

Guide to SAVOY Intuit Link for Clients

Intuit Link is a secure web-based portal that your Tax Accountants can use to gather tax data from your clients.

Intuit Link provides the following features to clients:

- Clarity on what your Tax Accountant needs to prepare for your tax returns
- Flexibility to collect & share tax data year-round from any device, including:
 - Document uploads
 - Snapping pictures from a mobile device
 - Download documents from your financial institutions
- Ability to keep track of your progress to help get everything faster to your Tax Accountant
- Bank level encryption, so you will feel secure knowing that your data is protected.

The taxpayer experience, with Intuit Link, is initiated by an email invitation from your Tax Accountant like the one below.

1. To accept the invitation from your Tax Accountant, click on the **Get Started** button located within the email. This will automatically open a new browser window to the taxpayer Intuit Link site.

NOTE: In an effort to simplify the sign up process for the tax payer, the e-mail address the Link invitation was sent to will be used as the clients User ID for Intuit Link. If the tax payer would like to be setup with a different e-mail address, they must contact the Tax Accountant before accepting the invitation.

2. If the tax payer does not have an Intuit online account, they will be required them to create one.
 - a. The user ID will automatically be pre-filled with the e-mail address. Since this is the method that links the tax payer to your Tax Accountant, the user ID needs to be the clients email address.

intuit. Link

Your taxes just got easier

Create an Intuit account

Already have an account? [Sign In](#)

Email address

link83829+2@gmail.com

Password

Confirm password

Mobile phone (optional)

Create Account

If an online account exists, the tax payer is prompted to enter your password. In this instance, the clients e-mail address will be also be your user ID.

intuit. Link

Woohoo! You already have an Intuit account.
We just need your password.

Sign in

Email or user ID
intuitlinkra+nc@gmail.com

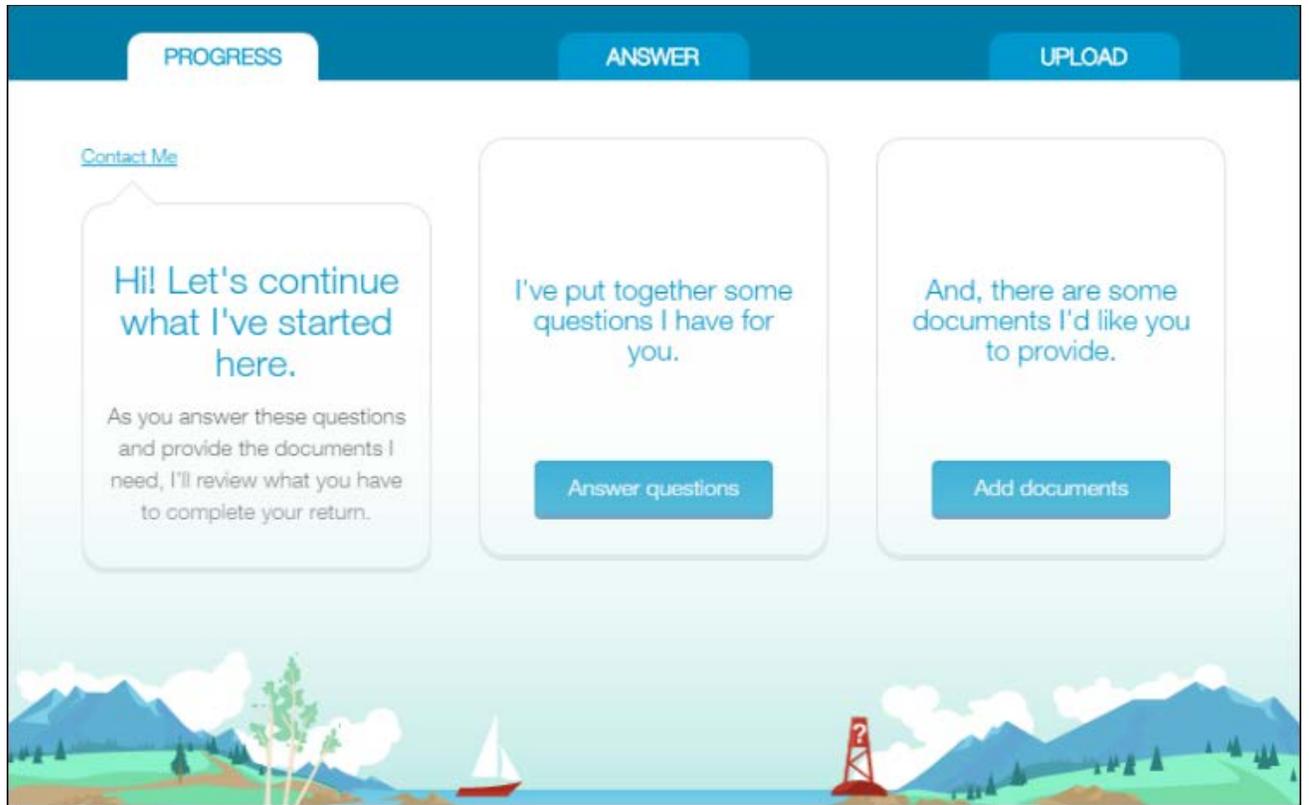
Password
|

Remember me

Sign In

[I forgot my user ID or password](#)
[New to Intuit? Create an account](#)
[Need help? Visit Support](#)

3. After logging in, you will now be entered into the site and will have a **Welcome** message, inviting you to Intuit Link.
4. Click on the **Let's Get Started** button.
5. If your Tax Accountant has sent questions or document requests, you can simply click on the **Answer questions** or **Add documents** buttons. This will load the correlating screen.



- For yes or no Questions, there are Yes, No, or Not Sure buttons, next to the question. There is also an option to add a comment and add a file located on the right side.
- For open-ended Questions, you will see a list of questions with a dialog box to the left. To answer questions, simply write the answers in the dialog box. Open-ended questions also have an option to add a file.

The screenshot shows a tax software interface with three tabs: 'PROGRESS', 'ANSWER', and 'UPLOAD'. The 'ANSWER' tab is active. There are two question cards. The first card has a green checkmark icon and asks 'Did your marital status change before 12/31/2014?'. It has three radio button options: 'Yes' (selected), 'No', and 'Not Sure'. To the right are links for 'Add a comment' and 'Add a file'. The second card has a question mark icon and asks 'Did you have any child or dependency care expenses? Please include care provider's name, address, SSN, and amount.'. It has a text input field and an 'Add a file' link. The bottom of the interface features a decorative landscape with mountains, trees, and a red tower.

6. Once a question is answered a green check mark will appear in the column on the left.
7. For Add documents or Upload, the taxpayer will see a list of requested documents, with an Upload Document button located in the center, next to each request.

PROGRESS	ANSWER	UPLOAD
 1099	Upload Document	
 W2	Upload Document W2 2014.png 	
 I-9	Upload Document K-1 1041 2012.png 	
 W-2	Upload Document W2G 2014.png 	
 Do you have other documents to provide? If so, you can upload them here.	Upload Document(s)	

8. To upload a document, save the document in an easy to find location on your computer.
 - i. Click on **Upload Document**.
 - ii. Navigate to the location where the file is saved.
 - iii. Select the file.
 - iv. Click **Open**.
 - v. If the wrong document is opened, it can be deleted by clicking on the trash can icon located to the right of the document name, and a new document can be uploaded by following the previous steps.
 - vi. Once a document is successfully loaded, a green checkmark will appear in the column on the left.

10. If you have questions, click on the Contact Me button on the top left. This will open an email directed to your Tax Accountant's email on file with Intuit Link.
11. Once Questions are answered and Documents are uploaded, your Tax Accountant will be notified of the changes, and the taxpayer is finished. Any new requests from your Tax Accountant will trigger an email notification to you.