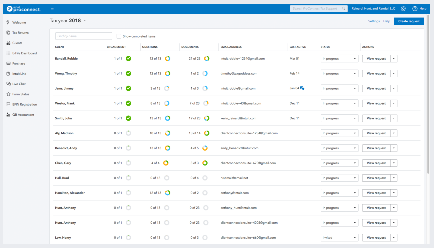
Import and Apply Client Source Document Data

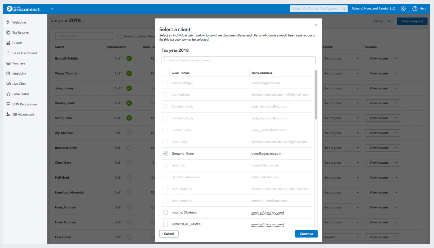
One of the many great benefits of a cloud-based tax software are the tools that significantly reduce manual work, like collecting tax documents from clients and data entry.

Step 1: Send the client request



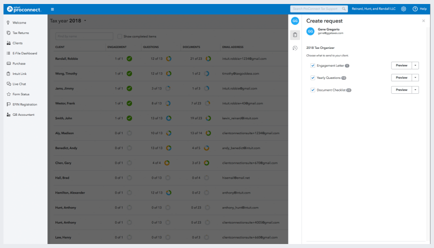
Get started

Log in to ProConnect Tax Online. Select **Intuit Link** in the main navigation panel to the left. Then, select **Create Request** in the upper right-hand corner.



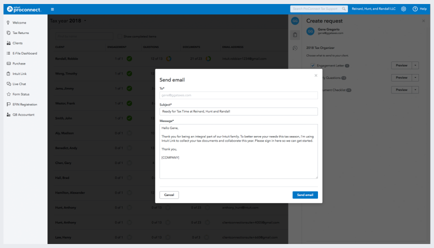
Create an organizer request

Select a **Client**, then click **Continue**. Check the items you'd like to request: an engagement letter for digital signature, a questionnaire and/or a document checklist. Then, click **Continue.**

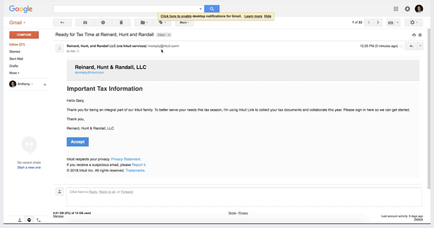


Send client request

Review the email request that will be sent to your client. Personalize the email, if you'd like, then click **Send Email**.

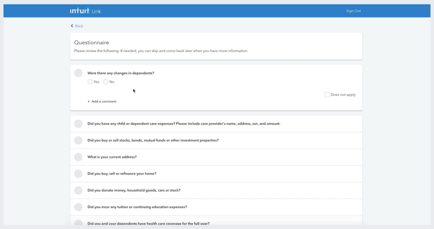


Step 2: Client completes the tax request



Client accepts Link request

Your client will receive an email request from you. They simply click **Accept** in the email to create an Intuit account login.



Client reviews and completes

The client can then preview the engagement letter and digitally sign, answer your questionnaire and upload the documents you requested.

intuit proconnect

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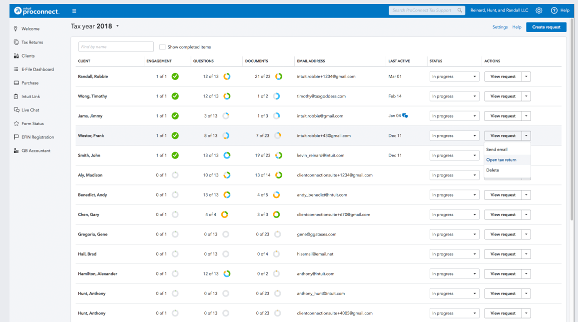
Step 3: Review and import client documents and information

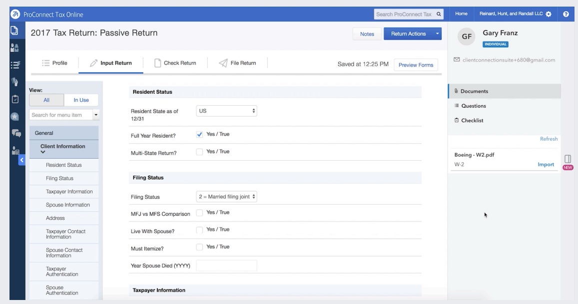
Get started

Click **View request** menu and click the **Open tax return** option. Click on the client's return link. On the **Input Return** tab, click the **Client Organizer icon (clipboard)** on the right side. Here you'll find all the client's questionnaire responses and documents.



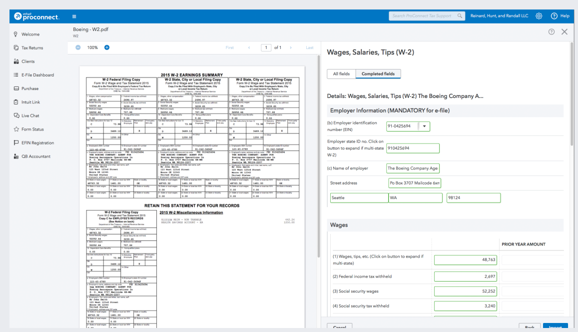
Import client tax data

Under Document Checklist, click **Import** next to the document you would like to import.



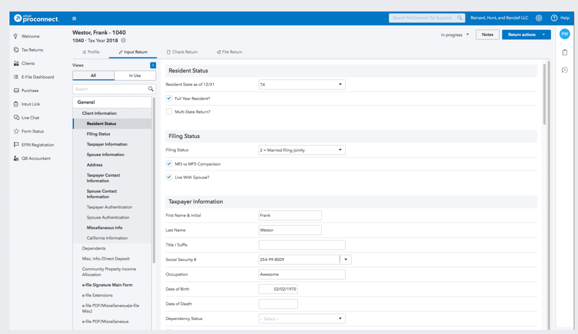
Review client tax data

Once the import is complete, you'll be prompted to view the original source document and the imported data side-by-side. Review for accuracy and click **Import**.



Apply client tax data

The client's data is then automatically mapped to the corresponding fields in the tax return. No data entry required!



Supported source documents

Currently Data Import capabilities are supported for seven of the most popular tax forms – **W-2, 1099-INT, 1099-DIV, 1099-R, 1098-Mortgage, 1099-MISC and 1098-T**. There's more coming soon!