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.
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**.

**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, 1099-MISC, 1098-Mortgage, 1098-T**. There’s more coming soon!