

Your Secure Intuit Link

How to Use ProConnect Intuit Link

We use ProConnect Intuit Link as our secure portal to share tax documents, answer questions, and communicate safely throughout tax season. This guide gets you started.



How to Get Started



Watch for a secure email invitation from our office.

Sent by Michelle Soele PLLC · subject line

"Getting Ready for Tax Time"

Don't see it? Check spam or junk, then mark it "Not Spam."

Getting Started

- 1 Open the Invitation**
Click the blue Accept button in the email — the secure link is unique to you.
- 2 Create Your Intuit Account**
Enter your email, set a strong password, and add your phone for verification.
- 3 Sign In**
Continue to ProConnect Tax to reach your secure portal.

Signing In & Account Help



- 1** Already use TurboTax or QuickBooks? Click Sign In and use that login.
- 2** Forgot your password? Use "Forgot Password" on the sign-in page.
- 3** New device? Enter the 6-digit code Intuit texts you.
- 4** Return anytime at link.intuit.com — progress saves automatically.

Inside Your Intuit Link Portal

Everything we need from you is organized into a few simple sections.



Document Checklist

What We Need

UPLOAD

Your personalized list of items we need for your return.

You can

- ✓ Upload requested files
- ✓ Replace a file anytime
- ✓ Track each item's status

PDF (best), JPG/PNG, Word & Excel accepted — up to 25 MB each.



Questionnaire

Organizer Questions

RESPOND

A few quick questions we need answered for your return.

You can

- ✓ Answer each question
- ✓ Add a comment for context
- ✓ Mark items "I'm Done"

Tip

No match? Click "Does not apply." Progress saves automatically.



Tips for a Faster Process

- ✓ Upload PDFs when you can — cleanest for us to work with.
- ✓ Phone photos: good light, all four corners, no glare.
- ✓ Use Google Chrome for the most reliable experience.
- ✓ Never email tax documents — the portal is encrypted.
- ✓ Save your Intuit login somewhere safe for next year.



Final Step — Notify Your Accountant

- ✓ This is the step most clients miss — and it matters most.
- ✓ When most documents are uploaded, mark items "I'm Done."
- ✓ Then select "Yes, Notify My Accountant."
- ✓ This tells our office your file is ready to prepare.

