

Using Checklists in Hub

Hub allows users to maintain a checklist of tasks and/or requests assigned to a client. This is an automatically generated list based on your client's prior-year return that can be added to or changed as needed.

Reviewing a Checklist

- 1. Open the ProFile application.
- 2. Select the "Hub" option from the "Goto" menu in the top toolbar.



3. Hub opens, displaying a list of clients Identify the client to whom you want to create a checklist for (e.g., "John, Alexis"). Click the "Invite" button associated with the client.

ProFile Hub								
Action(s) • All •			Search (Client Name or File Name)				ч \$	
CLIENT INFORMATION								
	NAME 🗘	FILE NAME	INTUIT LINK	COMMENTS	STATUS	¢	LAST SAVED	
	Simpson. Jessica (647) 777-7776 💽	V2:123:15T	0/12	Payment is done.	Waiting For Client	•	Dec 16, 2016	
	Simo, Jessica (647) 777-7776 💽	77 JessicaSimpson V2123-15T	0/12	Payment is done.	Completed	•	Dec 14, 2016	
	Gupta, Varun	77 T2205_1.15T	Invite	This is an awesome file completed through the ProFile Hub	Carried Forward	•	Jan 30, 2017	
	Smith, John	77 T2205_10.15T	Invite Rejected	This is a sample character limite	In Partner Review	•	Dec 14, 2016	
	Wang, Phil	77 T2205_159.15T	Invite	Add Note	Work In Progress	•	Dec 14, 2016	
	John, Alexis (647) 949-6946 💌	77 T2205_160.15T	Invite	Add Note	Work In Progress	•	Dec 16, 2016	

4. The "Invite Clients to Use Link" window opens. Select the "Edit" link from the "Checklist" option.



Invite Clients To Use Link	×
To: Phil Wang 🛞	
Customize your invitation email below:	
Dear [CLIENTNAME],	
At [FIRMNAME], we know gathering tax info can be a pain. To make things easier, we're using Intuit Link to build a custom checklist for you. - We'll guide you through some questions, the documents needed, and let you know when you're done. - It's much more secure than sending by email so your personal information is safe! - Use your phone to snap photos of your documents much faster than using a scanner. Please sign up and get started. Regards, [FIRMNAME]	
Engagement Letter Edit Do not include Edit Do not include Checklist (6) Edit Do not include Checklist (6) Do not include	
Cancel	vite

The "Edit Document Checklist" window displays. The checklist details the client, the individual requests made to the client (based on the previous-year's requests) and the action that can be undertaken.

dit Document Checklist		23	
New clients get a	default checklist which can be modified here.	dd New Request	
📃 Do not include che	cklist for Alexis John		
CLIENTS	REQUEST	ACTION	
Alexis John	T4 from your employer(s)	Û	
	T5 from your bank(s)	Ū	
	Medical receipt(s)	Ū.	
	Charitable donation receipt(s)	Ū.	
	RRSP contribution receipt(s)	Ū.	
	Previous year Notice of Assessment from CRA	Ū	
Cancel		one	

Deleting an Existing Checklist Entry

1. Identify the checklist entry to be deleted.



2. Click on the "trash" icon inext to the checklist entry under the "ACTION" menu; the entry deletes.

Note: Hub users will not see a confirmation window; the checklist entry deletes immediately.

- 3. Click the "Done" button. The checklist updates and the "Edit Document Checklist" window closes.
- 4. Click the "Invite" button in the "Invite Clients to Use Link" window.

	Engagement Letter Edit Do not include	Questionnaire Edit Do not include	Ē	Checklist (6) Edit Do not include	e
Cancel					Invite

The invitation with the checklist is sent to the client.

Adding a New Checklist Entry

1. Click the "Add New Request" button in the "Edit Document Checklist" window. A new blank checklist entry field is created.

REQUEST	ACTION
T5 from your bank(s)	前
Medical receipt(s)	Ū
Charitable donation receipt(s)	前
RRSP contribution receipt(s)	힚
Previous year Notice of Assessment from CRA	힚
	Ū

- 2. Enter the new checklist entry (e.g., "Travel receipts").
- 3. Click the "Done" button. The checklist updates and the "Edit Document Checklist" window closes.
- 4. Click the "Invite" button in the "Invite Clients to Use Link" window.

	Engagement Letter Edit Do not include	=	Questionnaire Edit Do not include	Checklist (6) Edit Do not inclu	de
Cancel					Invite

The invitation with the checklist is sent to the client.