

Intuit Practice Management Emails and Reminders

Earlier this year, we started using a program called Intuit Practice Management (IPM) to improve work flow in our office. With this program, we are able to send and request information securely and send email reminders for tasks that need completed. While we have been using IPM with some of our payroll and accounting clients this summer, these emails will be new to most of you.

We know that not everyone is comfortable sending information this way. You are still able to share information with us the traditional way. If you would like us to stop the email reminders, please let your consultant know.

The emails that you will receive from IPM will come from an @nfbi.net email address. It will usually be from your consultant, but there is a chance that it will come from one of our other employees. If you do not recognize the name and would like to verify, feel free to call the office or contact your consultant.

When you receive one of these emails, you can click on either the box with the task or “view and manage your checklist” at the bottom of the email. This will open an internet browser window. The first time you respond to an email task we send to you through IPM, it will ask you to create a PIN in order to access it on other devices. After the first time, it will prompt you to enter your PIN whenever you attempt to complete a task from a different device. Creating this PIN will take you to the webpage where you can complete the task.

You will see NFBI’s logo in the top right corner of this webpage. If you click on the task, it will expand and show you all of the details/instructions. In order to complete the task just follow the instructions and either upload a file or post a comment. **If there is a PDF form attached that you need to fill out, be sure you save it to your computer before completing it.** If you fail to do so, it will save blank and you will have to fill it out again. When you have done all of this, just check the box and it will give us a notification that you have completed the task.

After the first of the year, you may receive an email with a listing of the 1099s, W-2s, and other tax documents you received last year. You can upload the documents and check them off your list as they come or you can wait until you get them all.

As an example, this fall, many of you will be receiving or may have already received an email with the subject “Please complete this engagement letter.” The contents of the email will look something like this:

Please complete the engagement letter, sign and return to us. By clicking below, you can get more information, add comments or questions, and upload files. Once you have completed the letter, please remember to check it off so we know that it has been done.

<input type="checkbox"/> Sign and return engagement letter	Due Oct 31 2020
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[View and manage your checklist](#)

intuit

The engagement letter the email is referring to is this year’s version of the same letter we have been having you sign the past couple of years. In order to complete the task, click on the box or on “view and manage your checklist.” It will open a browser and prompt you to create a PIN. After a PIN is created, it will take you to your checklist.

Engagement Letter
Abbenhaus, Kylie



Nebraska Farm Business, Inc. would like you to complete these tasks.
Click on tasks for more details.

Sign Engagement Letter

Sign and return engagement letter Due Sat 31 Oct

Fill out appropriate cells. Include names of children if you want us to prepare those returns as well. You can sign electronically and return to us via email or you can print it and mail it back to us. After completing the task, please mark the task so you don't receive further emails.

[1 file](#)

[Comment](#) or [Upload Files](#)

If you click on the task, it will expand and show you more details.

Sign Engagement Letter

Sign and return engagement letter Due Sat 31 Oct

Fill out appropriate cells. Include names of children if you want us to prepare those returns as well.

You can sign electronically and return to us via email or you can print it and mail it back to us.

After completing the task, please mark the task so you don't receive further emails.

Engagement Letter.pdf 168KB



Comment

Upload Files

In order to complete the task, you just need to open the PDF, save the PDF to your computer, follow the instructions listed on the task, save the PDF, and upload it onto the task. After you have done all of this, just check the box and we will get a notification that you have completed the task.