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Aravo Supplier Guides

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Aravo:

How to Reset Password or Retrieve Username

Supplier Guide: How to Reset Password or Retrieve Username in Aravo

This guide will provide Suppliers with step-by-step guidance on resetting password or retrieving username in Aravo

Password Reset

Step 1: Login to the Aravo portal:

<https://intuit.aravo.com:/aems/login.do>

Step 2: Enter your **Username**

Step 3: Click **Need help accessing your account?**

The screenshot shows the 'Login' page of the Aravo portal. It features a title 'Login' at the top left. Below the title are two input fields: 'Username:' and 'Password:'. A red 'Login' button is positioned to the right of the password field. At the bottom of the form, there are two language links: 'English (United Kingdom)' and 'English (United States)'. A blue-bordered link 'Need help accessing your account?' is located at the very bottom of the page. Three teal circular callouts with white numbers are overlaid on the image: '2' is next to the Username field, and '3' is next to the 'Need help accessing your account?' link.

Step 4: Select **Forgot Password** and click on **Continue**

Step 5: Instructions for resetting the password will be sent to your email address

Find Account Information

Choose the account information you need help with.

Forgot Password

Forgot Username

Continue

Cancel

ARAVO

Email sent

✔ We have sent instructions for resetting the password to the email address on the account.

If you do not receive an email or you are still unable to login - please contact Intuit Tech Support at t4AravoSupport@Intuit.com with the following reference:
token M539-1645658987553

Back to login page

Retrieve Username

Step 1: Login to the Aravo portal:
<https://intuit.aravo.com:/aems/login.do>

Step 2: Click on **“Need help accessing your account?”**

Step 3: Enter your Email Address and click on **Send**

2

Username:

Password:

Login

[English \(United Kingdom\)](#) · [English \(United States\)](#)

[Need help accessing your account?](#)

3

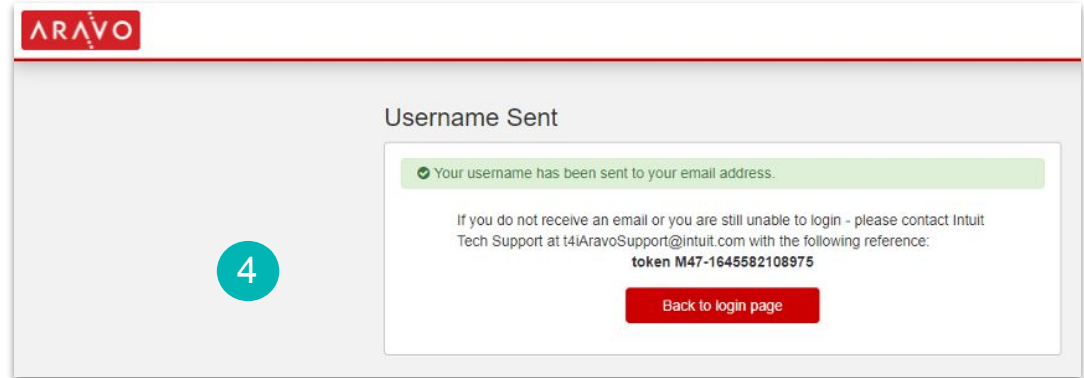
Forgot Username

Email Address:

Send

[Cancel](#)

Step 4: Username will be sent to your registered email address



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Aravo:

How to update Banking Details

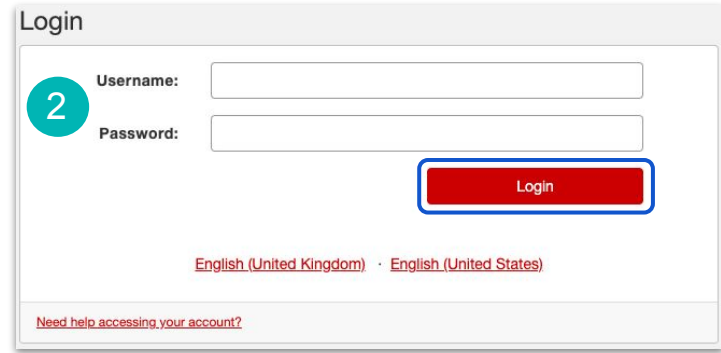
Supplier Guide: How to Updating Banking Details in Aravo

This guide will provide Suppliers with step-by-step guidance on updating their banking information in Aravo

Step 1: Login to the Aravo portal:
<https://intuit.aravo.com:/aems/login.do>

Step 2: Enter your Username and Password and click on Login

Step 3: Scroll down on the Aravo homepage and click on the **Update Information** button.



Login

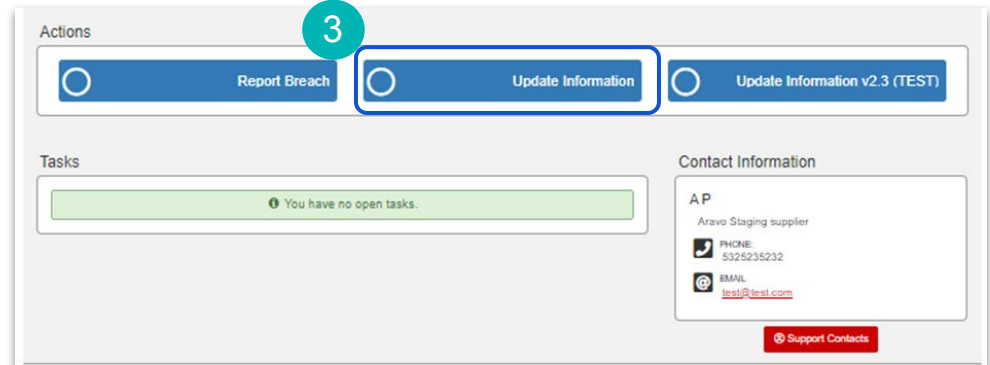
2 Username:

Password:

Login

[English \(United Kingdom\)](#) · [English \(United States\)](#)

[Need help accessing your account?](#)



Actions

3

Report Breach Update Information Update Information v2.3 (TEST)

Tasks

You have no open tasks.

Contact Information

AP
Aravo Staging supplier

PHONE: 5325235232

EMAIL: test@test.com

Support Contacts

Step 4: Click on the dropdown **Select Some Options**

Step 5: Select **Site & Bank Details** and click submit

Step 6: Click **Submit**.

The screenshot shows a web form titled "Update Information" with a yellow header. Below the header is a grey box containing instructions: "Please review the selections below and select the section(s) you want to update." and "Based on the selection(s), the information will be displayed for updating. Our Supplier Data Management team will review and approve your updates. During the review process, your profile will be locked." Below this is a text input field with the label "Select the data which you want to update: *". To the right of this field is a dropdown menu labeled "Select Some Options". A blue arrow points from this dropdown to a separate window showing a list of options: "Address & MISC", "Attestations", "CEO / Owner / Beneficiary Owner information", "Contact", "General Information", "Site & Bank details" (highlighted in blue), and "Tax & Withholding information". Below the dropdown are two buttons: a red "Submit" button and a grey "cancel" button.

Update Information

*Required Field

Please review the selections below and select the section(s) you want to update.

Based on the selection(s), the information will be displayed for updating. Our Supplier Data Management team will review and approve your updates. During the review process, your profile will be locked.

Select the data which you want to update: *

Select Some Options

Submit cancel

Address & MISC
Attestations
CEO / Owner / Beneficiary Owner information
Contact
General Information
Site & Bank details
Tax & Withholding information

Step 7: Determine whether you want to use your company headquarters address (billing address above) as the payment address.

If yes, select **Yes** skip to **Step 9**

If no, select **No** and continue to **Step 8**

Step 8: When you select **No**, the screen will display an area for you to input your billing address. Complete all required fields.

Step 9: Enter **ONE** email address for **Purchase Orders** and enter **ONE** email address for Remittance (payment status information).

7 Do you want to use your company headquarters address (billing address above) as the payment address? * Yes No

Address 1 *

Address 2

Address 3

Address 4

City *

Country *

8 Do you want to use your company headquarters address (billing address above) as the payment address? * Yes No

Email Instruction

Please enter **ONE** valid email per field for PO and Remittance values.

9 Email address for Purchase Orders *

Email address for Remittance *

Step 10: To update the **Accounting Contact Information** click on **Action** to show the drop down to choose **Edit**.

Update **First Name**, **Last Name**, **Email** and **Phone** of the primary contract as required

Step 11: To update the **Primary Account Information** click on **Action** to show the drop down to choose **Edit**.

A new window will open

Step 12: Select your **Bank Country** from the drop down list.

Note: The bank country will drive the required fields. There are helpful hints t to guide you. In this example we have selected United States of America as the Bank Country.

Step 13: Select your **Name of Bank** from the drop down list

Step 14: Select your **Branch Type**

Note: For US or Canada banks choose **ABA**. For all other countries it will depend on the country your bank is located in, if you need guidance contact **SupplierConnect@intuit.com**.

Accounting Contact Information

Filter Results:

	First Name*	Last Name*	Email*	Phone	Title
Actions	A	P	test@test.com	35353252352	

Primary Account Information

If your bank is not displayed below, please select your existing bank account from the drop down field next to the "Associate" button. Then click "Associate." The selected bank account will populate in the section under banking information. Click on "Actions," then "Edit" to change your banking information.

Primary Account Information

Filter Results:

	Bank Name	Bank Account Number	Primary?	Bank Country	Start Date
Actions Edit	SILICON VALLEY BANK	3300880430	—	United States Virgin Islands	07/24/2021

Choose an existing Banking Information: **Associate**

Edit Banking Information

Primary Account Information

Bank Country*

Name of Bank*

Branch Type*

Step 15: Enter your **Bank/Routing Number** or **Swift Code** depending on the location of your bank.

Step 16: Enter your **Bank Account Number**, **Account Currency** and **Bank Account Type**.

The screenshot shows a web form titled "Edit Banking Information". At the top, there is a text box containing the instruction: "digit institution identifier, and a check digit, which is used to uniquely identify any qualified financial institution participating in the payments system." Below this, it says "Formatted as: NNNNNNNNN" and "Example: 211179539".

Callout 15 points to the "Bank/Routing Number" input field. Below this field is a note: "Swift Code not required for domestic payments AND If you are using a Foreign Currency for this Bank Account, Swift Code is mandatory." Below that is the "SWIFT Code" input field.

Callout 16 points to the "Bank Account Number" input field. Below it is the "Account Currency" dropdown menu, which is currently set to "USD". At the bottom, there is a "Bank Account Type" section with radio buttons for "Checking" (selected) and "Savings".

Step 17: Determine if an intermediary bank required for the payment.

If no, select **No** and skip to **Step 19**

Step 18: if you select **Yes**, additional fields will appear. Enter the required fields as applicable

Step 1: When your updates are complete, select **OK**.

Note: The Supplier Data Management team will be automatically notified to review and approve. Your Bank Details will be updated within 48 hours.

If you have difficulty in completing any portion of the banking section, please reach out to **SupplierConnect@intuit.com** with any questions.

Intermediary Bank Information

i In case an intermediary bank is required to receive final payment, please indicate bank details for intermediary bank as well. Please note that we cannot make a USD payment to a US bank via another US bank, i.e., no corresponding banks for USD Domestic Wires.

17 Is an intermediary bank required for the payment?* Yes No

Edit Banking Information

Is an intermediary bank required for the payment?* Yes No

Intermediary Bank Name *

Intermediary Bank Account Number/Code *

Intermediary Bank Key/ ABBA Routing # of Intermediary/ IBAN # *

Intermediary Bank SWIFT Code

i For help, contact SupplierConnect@intuit.com

18 19 **OK** cancel

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Aravo:

How to Add a User

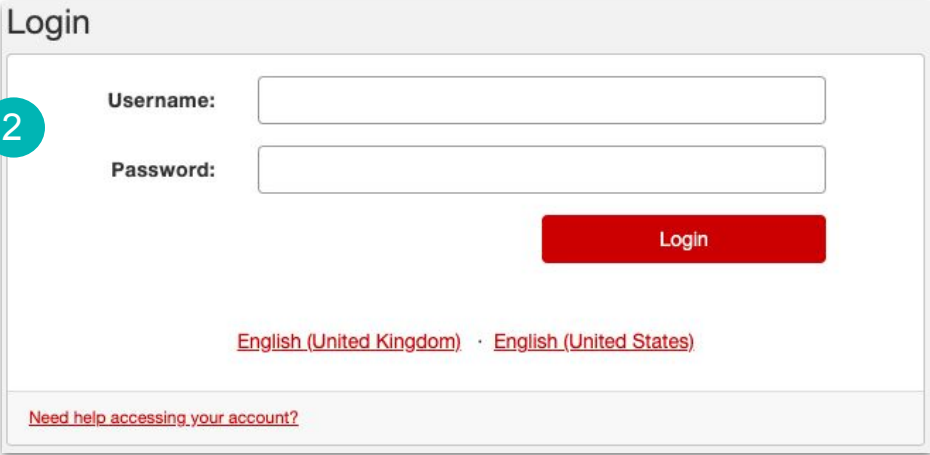
Supplier Guide: How to add a user in Aravo

This guide will provide Suppliers with step by step guidance on adding site contacts within Aravo. Provide contacts for Accounting, Sales/Business, Information Security, Privacy, and 24x7 Emergency. These contacts can be the same person or different people.

Step 1: Login to the Aravo portal:

<https://intuit.aravo.com:/aems/login.do>

Step 2: Enter your **Username & Password**



2

Username:

Password:

Login

[English \(United Kingdom\)](#) · [English \(United States\)](#)

[Need help accessing your account?](#)

Step 3: To edit an existing contact, click **Actions** > **Edit**.

Step 4: To add new contact, click **Add a new Contact**

Contacts

Filter Results:

	First Name	Last Name	Email	Type	Phone	Phone Ext
				—	—	—

3 **Actions**

4 **Add a new Contact**

Step 5: Add contact details and select the **Type** field to select from the drop-down list

5

Add New Contact

First Name * Joe

Last Name * Smith

Email * smith@sup2.com

Title

Please enter one of the following in the Title field above:
CEO, CFO, Owner, Partner, Senior Vice President, Vice President, Director, Manager, Administrator/Assistant.

Type *

Phone *

Accounting

Business

24x7 Emergency

Information Security

Privacy

Step 6: Select the **Self Service Login Access** checkbox

Step 7: Click **OK** when done

i Attention:
Before clicking "OK" below, please be sure to check the "**Self Service Login Access**" checkbox to ensure you receive login credentials to the Intuit 3rd Party Portal

Self Service Login Access

OK [cancel](#)

7

6

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Aravo:

How to Complete a Security Assessment

Supplier Guide: How to Complete a Security Assessment in Aravo

This guide will provide Suppliers with step-by-step guidance on completing Intuit's 3rd Party Security Assessment (3PSA). You are being asked to complete this because your company has or will have access to Intuit confidential information. **Note:** You may also receive a Privacy Assessment in addition to this Security Assessment. These are two distinct assessments and both should be completed if requested.

Step 1: You should have received an email from a member of our Privacy team with the subject line, **[Action Required] Please Complete and Return Intuit Third Party Security Survey**, open the email

Note: If you are not the correct person within your organization to complete the Security Assessment, you can forward the email to the correct individual

Step 2: Select **Click here** to begin the assessment

Note: If you need support on the Security Assessment you can reach out to the 3rd Party Security Assessment team at **3PSA@intuit.com**

Email Details Delivered ✓

SUBJECT	[Action Required] Please Complete and Return Intuit Third Party Information Security Survey –
SENT	12/02/2021
RECIPIENT	
CC	
SENDER	

Hello ,

Intuit performs a third party security assessment (and periodic reassessments) on its partners who process, store, manage or have access to Intuit confidential information.

It's been identified that your company, , has or will have access to Intuit confidential information. As such, we request that you complete this third Party information security assessment survey regarding your company's information security controls by **12/09/2021**.

Please Note:

If you're NOT the right person to complete the survey, please don't try to open or complete it, but instead forward this email to the appropriate person.

If you ARE the right person to complete the survey, please use your Aravo **credentials** to log in to the [Aravo portal](#) and go to My Tasks to complete the survey. If you are unable to access the Aravo portal, [Click here](#) to directly access the survey. If neither of those work, please email t4iAravoSupport@intuit.com for help.

Once you've successfully accessed the survey, you can contact the Intuit Information Security team with any questions you may have about the survey itself, by emailing 3psa@intuit.com

Thank you,
Intuit Information Security Team

Note: As part of this assessment you will be required to provide information in the following sections:

- Service Overview
- Hosted Data
- Segregation
- Asset Management
- Risk Management
- Encryption
- Business Continuity
- Data Storage
- Access Management
- Network Security
- Hosted Based Security
- Logging and Monitoring
- Vulnerability Management
- Incident Management
- Change Management
- Security Awareness
- Human Resource
- Software Development

Step 3: Select **Complete this Intuit Security assessment** from the drop down menu

Note: Alternatively, you can attach a security attestation report or Shared Assessment

If you think that this assessment does not apply please reach out to **3PSA@intuit.com** to discuss before making a selection

Step 4: Click **Next** to continue

Assessment Details

Page Requirements 0% Required Completed 0 of 1 Page Completed

Save & Continue Next »

*Required Field [preview](#)

Third Party Name Pazien, Inc.

Intuit expects third parties we do business with to comply with Intuit information security requirements, data privacy, and applicable data protection laws. Since your organization will have access to Intuit corporate, worker, or customer information, Intuit requires a response to this security assessment request.

Return this completed security assessment questionnaire or documents within 7 business days of receipt of this request. If you cannot meet this timeline or have any questions, please email us of your expected response date at 3PSA@intuit.com.

Third parties working with Intuit must undergo a security assessment by responding to an Intuit security questionnaire or providing the appropriate documentation. In lieu of this questionnaire, Intuit may accept

- A security attestation report (e.g. SOC2 TypeII report, PCI Attestation of Compliance (AOC) report, ISO 27001:2013 report)

or

- An already completed Shared Assessment (e.g. SIG, CAIQ)

How will you provide the requested information to Intuit? 3 Select an Option

4

Save & Continue Next »

Complete this Intuit Information Security questionnaire

Complete this Intuit Information Security questionnaire

Attach security attestation reports or shared assessment documentation

We will NOT complete the questionnaire nor provide documentation

We are not sharing or accessing Intuit data. This questionnaire does not apply

Step 5: Complete the **Service Overview** section of the assessment

Note: Throughout this assessment, the responses you give may trigger additional questions to appear

5

Service Overview

Describe the services being provided to Intuit for this engagement. How do these services interact with Intuit scoped information? *

Describe the data flow as it relates to this engagement with Intuit *

Attach a copy of a data flow diagram and/or architecture diagram *

Choose File No ...sen

Which Intuit product lines apply to this engagement? *

Select Some Options

What is the highest data classification that describes this engagement with Intuit? *

Select Some Options

What data elements are being shared or accessed for this engagement? *

Step 6: Complete the **Hosted Data Service** section of the assessment

Step 7: Complete the **Segregation** section of the assessment

Step 8: Click **Next** to continue

Note: At any point you can click **Save & Continue** in case you need to leave the assessment and come back to it later

The screenshot displays a web-based assessment form. The top section is titled "Hosted Data Service" and contains three main input areas: a text box for describing the hosting environment, a text box for listing cities, states, and countries, and a dropdown menu for selecting hosting options. The bottom section is titled "Segregation" and contains a single question with radio button options. At the bottom of the form are three navigation buttons: "Back", "Save & Continue", and "Next".

6 Hosted Data Service

Describe the hosting environment and services used.

List all the cities, states/regions, and countries that will host Intuit's scoped services and data. Include any redundant data centers *

How will these services or Intuit scoped data be hosted? *

Select Some Options

7 Segregation

Is Intuit's data segregated from other customer data? * Yes No

8 « Back Save & Continue Next »

Step 9: Complete the **Asset Management** section of the assessment

Note: Throughout this assessment, the responses you give may trigger additional questions to appear

9

Asset Management

Are staff allowed to have direct access to Intuit scoped systems or data directly via non-managed personal devices? * Yes No

Do you monitor and limit the use of external devices (USB, CDs, etc.) to business need? * Yes No

Do you have an asset inventory tool that manages and tracks authorized IT assets that handle Intuit scoped data? * Yes No

Which industry standards do you use for provisioning hardware, software, and operating systems that handle Intuit confidential data? *

Step 10: Complete the **Risk Management** section of the assessment

Step 11: Click **Next** to continue

10

Risk Management

Do you monitor and perform security assessments of your third parties, specifically any that might have access to Intuit data, for security risks at least every 12 months? * Yes No

If yes, explain how security assessments of your third parties are performed

If no, why are you not monitoring and performing security assessments of your third parties?

*

Will there be any subcontractors or any other third parties working on your company's behalf that will be involved with this Intuit engagement and have access to Intuit scoped systems or data? * Yes No

Will there be an integration and data sharing between Intuit, your organization, and a sub processor of yours or another third party not associated with this engagement? * Yes No

11

« Back Save & Continue Next »

Step 12: Complete the **Encryption** section of the assessment

Note: For more information about about the words in blue, you can hover over them and a tips pop up will appear

12

Encryption

Intuit expects that encryption is enabled on all hard disks for all host-based and/or file storage that access, store, and/or process Intuit scoped data. What type of encryption is enabled protecting Intuit scoped data at rest? *

Select an Option

Provide details about the encryption

Do you encrypt Intuit scoped data *in transit*? *

Yes No Not Applicable

Provide details about the encryption for data in transit *in transit*

Do you use any deprecated encryption algorithms and key lengths for protecting *Intuit data at rest or in transit*? *

Yes No Not Applicable

Provide details about the deprecated encryption

How are you managing encryption keys for Intuit scoped data? *

Select an Option

Describe how you are managing encryption keys

Step 13: Complete the **Business Continuity** section of the assessment

Step 14: Complete the **Data Storage** section of the assessment

The screenshot displays a web form with two sections. The first section, titled "Business Continuity", contains a question: "Do you have a Disaster Recovery Plan and/or Business Continuity Plan? *". To the right of the question are two radio buttons labeled "Yes" and "No". A teal circle with the number "13" is positioned to the left of this question. The second section, titled "Data Storage", contains a question: "How are backups storing Intuit scoped data protected? *". To the right of the question is a dropdown menu with the text "Select an Option" and a downward arrow. A teal circle with the number "14" is positioned to the left of this question.

Step 15: Complete the **Access Management** section of the assessment

Step 16: Click **Next** to continue

Access Management

15 Do you have multi-factor authentication (MFA) enabled in your environment for employee access to Intuit scoped data and/or services? * Yes No

List the compensating controls your organization has deployed to help reduce the risk of not having MFA

Can you meet ALL of the following minimum NIST SP 800-63 password standards for systems that handle Intuit scoped data/services: Yes No

- * 8 character minimum when a human sets password
- * 6 character minimum when set by a system/service
- * Support at least 64 characters maximum length
- * Minimum of 10 password attempts before logout
- * No complexity requirements
- * No password expiration period
- * No password hints

Do you perform user account reviews every 90 days (or sooner) to ensure access is appropriate, and do you disable accounts that have been terminated or are inactive? * Yes No

Is access control on applications, operating systems, databases, and network devices configured according to the principle of least privilege/Role Based Access (RBAC) for Intuit scoped systems and/or data? * Yes No

Can you meet ALL of the following privileged access user standards for users who process or store Intuit scoped data/services? Privileged user accounts are Yes No

- * restricted to system maintenance work and not daily functions such as email, web browsing, etc.
- * unique per individual and not shared with others
- * monitored for anomalous activity

16 « Back Save & Continue Next »

Step 17: Complete the **Network Security** section of the assessment

Step 18: Complete the **Hosted Based Security** section of the assessment

Network Security

17 Is Intuit in scope services/data hosted behind a firewall with a default-deny rule that drops all traffic except those services and ports that are explicitly allowed for this service/offering? * Yes No

Is there an Intrusion Detection/Prevention System (IDS/IPS) to detect/block malicious network traffic at your organization's network boundaries? * Yes No

Is there a Web Application Firewall (WAF) in place to protect against common attacks for any Intuit scoped externally facing web applications? * Yes No

Host Based Security

18 Is there host-based security (anti-virus, behavioral, etc.) on all systems that handle Intuit scoped services/data? * Yes No

Step 19: Complete the **Logging and Monitoring** section of the assessment

19

Logging and Monitoring

Are ALL logs supporting Intuit scoped data protected against modification, deletion and inappropriate access? * Yes No

Are your network and security systems logging ALL activity info, errors, start and finish times? * Yes No

Are log files retained for 90 days or longer? * Yes No

Are log reviews of systems handling Intuit confidential data continuous with alerting enabled for anomalous activity at least on a daily basis? * Yes No

Do you have an automated system to alert suspicious events (e.g. SIEM or equivalent)? * Yes No

Are logs encrypted and/or isolated to restrict access to specific roles and prevent tampering? * Yes No

Step 20: Complete the **Vulnerability Management** section of the assessment

Step 21: Click **Next** to continue

20

Vulnerability Management

Can your organization meet Intuit's requirements for infrastructure vulnerability scanning for Intuit scope systems? Yes No

***Vulnerability scanning on Intuit scope system should be done on a monthly basis**
***Found vulnerabilities should be prioritized by severity and remediated on a risk-based timeline ***

Provide details about your vulnerability scanning

Intuit requires security patching to follow the National Vulnerability Database ratings and scheduling guidelines: Yes No

-Critical rated patches should be applied no later than 48 hours of release
-High rated patches should be applied within 7 days of release
-All other vulnerabilities should be applied within 30 days of release

Can you meet these guidelines? *

Provide details about your security patching plan

Do you have any pending zero day vulnerabilities and/or critical/high risk vulnerabilities on resources on which Intuit shared data will be stored and processed? Yes No

Be sure to consider unmitigated risks related to the SolarWinds, FireEye, Microsoft Exchange, or Apache Log4j vulnerabilities. *

21

Step 22: Complete the **Incident Management** section of the assessment

Step 23: Complete the **Change Management** section of the assessment

Step 24: Complete the **Security Awareness** section of the assessment

Step 25: Complete the **Human Resource** section of the assessment

Step 26: Click **Next** to continue

Incident Management

22 How often do you test your Incident Response Plan with the incident handling team? * Select an Option ▾

Has your company experienced a data breach within the last 3 years? * Yes No

Change Management

23 Do you have a formal change management process which includes impact analysis, approvals, testing, and rollback procedures? * Yes No

Describe your change management process

Security Awareness

24 Are employees required to take security awareness training at least annually or when there has been a substantive change to security policies or procedures? * Yes No

Human Resource

25 Have all employees who have access to Intuit data gone through a criminal background check? * Yes No

26 « Back Save & Continue Next »

Step 27: Complete the **Software Development** section of the assessment

Step 28: Add any **Closing Comments**

Step 29: Click **Next** to continue

The screenshot displays a form titled "Software Development" with three main sections. Step 27 is a radio button question: "Does the scope of this Intuit engagement include software development? *" with "Yes" and "No" options. Step 28 is a text area for "Closing Comments" with the prompt "Any additional comments or feedback for Intuit regarding this assessment?". Step 29 is a navigation bar with three buttons: "« Back", "Save & Continue", and "Next »". A note at the bottom of the form reads: "Don't forget to click the **Save & Send Updates** button to submit your information to Intuit."

Software Development

27 Does the scope of this Intuit engagement include software development? * Yes No

Closing Comments

28 Any additional comments or feedback for Intuit regarding this assessment?

29 « Back Save & Continue Next »

Don't forget to click the **Save & Send Updates** button to submit your information to Intuit.

Note: Review the information that you have provided

If you need to make any changes, click the **Back** button



Step 30: When you are finished with the assessment, click **Save & Send Updates**

Note: The 3PSA team will review your assessment and contact you via email if they require any further information or once the assessment is accepted

Review & Submit

Please review the information you have provided. If you would like to make a change to the information you have provided, please click on the 'Back' button or use the links in the menu on the left side of this page to go directly to the page that needs to be modified. If you are satisfied with the information you have provided, please click on the 'Save & Send Updates' button to submit your information.

[« Back](#)[preview](#)

Click on a page title below to expand a section, or click the + to expand all sections.  

▶ Assessment Details

▶ Security Assessment

▶ Security Assessment (contd.,)

▶ Security Assessment (contd.,)

▶ Security Assessment (contd.,)

▶ Security Assessment (contd.,)

▶ Security Assessment (contd.,)

30

[« Back](#)[Save & Send Updates](#)

intuit



Aravo:

How to Complete a Privacy Assessment

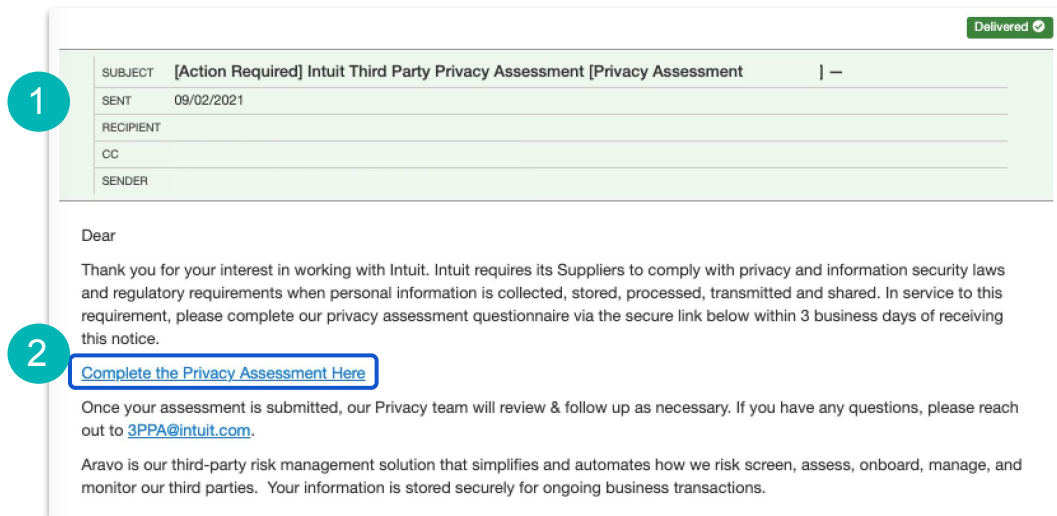
Supplier Guide: How to Complete a Privacy Assessment in Aravo

This guide will provide Suppliers with step by step guidance on completing a 3rd Party Privacy Assessment (3PPA). A Privacy Assessment is necessary because your organization will have access to transmit, process or store Intuit corporate, Intuit worker or Intuit customer information. **Note:** you may also receive a Privacy Assessment in addition to this Security Assessment. These are two distinct assessments and both should be completed if requested.

Step 1: You should have received an email from a member of our Privacy team with the subject line, **[Action Required] Intuit Third Party Privacy Assessment [Privacy Assessment xxxxxxxx]**, open the email

Note: If you are not the correct person within your organization to complete the Privacy Assessment, you can forward the email to the correct individual

Step 2: Click the link to **Complete the Privacy Assessment Here**



Note: As part of this assessment you will be required to provide information in the following sections:

- Your Organization's Role
- Data Delete and Access (if applicable)
- Privacy
- Purpose and Use
- Policy
- Reporting


Note: If you need support on the Privacy Assessment you can reach out to 3rd Party Privacy Assessment team at **3PPA@intuit.com**

Data Privacy Assessment

Save & Continue Next »

Page Requirements

Required Completed 0% | Page Completed 0 of 1

[preview](#) 

***Required Field**

Intuit expects third parties we do business with to comply with Intuit privacy requirements, data privacy and applicable data protection laws.

Your organization will have access to, transmit, process or store Intuit corporate, Intuit worker or Intuit customer information. Your responses to the following survey will allow Intuit to understand your organization's ability to meet and comply with the above requirements and laws.

Please respond fully to this survey within 7 business days of receipt. If you cannot meet this expectation, notify us of your expected survey response date at 3PPA@intuit.com.

Some questions contain tooltips. Hover over underlined words to see additional information.

You can save and return to the form as often as you need by clicking on the Save and Continue button. When you are ready to submit this form, make sure you click **Save and Send Updates** button on the last page to send your responses to Intuit.

If you have any questions, please contact Intuit Privacy Team at 3PPA@intuit.com

Step 3: Begin the process by ensuring the **Primary Contact** is listed on the form

You can select the appropriate contact from the drop down list and click **Associate**

If the appropriate contact is not found in the drop down list, click **Add a new Contact** to include that person

Note: Once the contact is selected or added, be sure to include the **Type** as **Privacy**

Privacy Contact

Required: There must be one Privacy Contact assigned. The contact should be the appropriate person within your organization who can answer a privacy questionnaire. Select **only one** contact designed for Privacy.

- Select from the dropdown and click Associate. If the Contact Type does not include Privacy, select Actions > Edit in the table to update the contact OR
- Click the Add new contact and create a new contact with Type = Privacy

Privacy Contact:

No items found.

3

Choose an existing Contact: ---

Associate

or

Add a new Contact

Privacy Contact:

Filter Results:

	First Name*	Last Name*	Email*	Title	Type*	All Fields Phone Number
Actions <small>Newly Associated</small>	Raj	Naik		Manager	Accounting, Main Contact, 24x7 Emergency, Information Security, Privacy	

Step 4: Choose the category for your organization

Step 5: Click **Next**

Note: At any point you can click **Save & Continue** in case you need to leave the assessment and come back to it later

Note: The questions that follow in the assessment will depend on your answer to this initial question

In this case, we are showing the questions which appear for **Data Processor**

Your Organization's Role

The next set of questions will help to determine your company's obligations with respect to data subject rights requests under applicable privacy laws and regulations

4 How would you categorize your organization? * Select an Option

Data Controller - the legal entity which determines the purposes and means of processing of personal data;

Joint Data Controller - the legal entity which, jointly with Intuit, determines the purposes and means of the processing of personal data;

Data Processor - the natural or legal entity which processes personal data on behalf of the controller (for example, in a service agreement)

5 Save & Continue Next >

Select an Option

- Data controller
- Data processor
- We do NOT access, transmit, process, or store Intuit data

Note: Throughout this assessment, the responses you give may trigger additional questions to appear

In this example, we are showing the questions which appear for **Data Processor**

Complete all required questions in the Organization section

Does Intuit have the same customer or Intuit worker data that is stored in your system? * Yes No

Can your company delete all customer data shared with you by Intuit every 30 days without impacting your business model? * Yes No

- De-identified means information that has had enough Personal Information removed or obscured such that the remaining information does not identify an individual, and there is no reasonable basis to believe that the recipient of the information can use it to identify an individual.
- Aggregated means information from or pertaining to a group of people that has been altered or manipulated so that there is no reasonable basis for the recipient of the information to discern the specific identity or response of any person from which the data was obtained or to whom it pertains.

Can you anonymize, de-identify, or aggregate the Intuit data that is shared with you? * Yes No

What data element or combination of data elements can Intuit use to help your company locate an individual in your system? *

Upon termination of services, are you able to delete any and all related Intuit data? * Yes No

Step 6: If applicable, complete the **Data Delete and Access** section (only required for Data Processors)

Note: For the **Data Inventory Attachment**, please use the link mentioned to download the template first, and then once completed upload the file

It is important within the Data Inventory to **specify who is the custodian of the data elements** in case we need to request access or deletion of certain elements.

Step 7: Click **Next**

6

Data Delete and Access

Do you have a **DELETE API**? * Yes No

Do you have an **ACCESS API**? * Yes No

Use this [link](#) to download a data inventory template. Provide the information requested and upload the file below.

Data Inventory Attachment *

No...sen

DELETE requests from Intuit must be acknowledged within 2 calendar days and executed within 10 business days. Can you meet this SLA? * Yes No

ACCESS requests from Intuit must be executed within 4 calendar days. Can you meet this SLA? * Yes No

7

Save & Continue

Next »

Step 8: Complete the **Privacy** section

Note: For more information about about the words in blue, you can hover over them and a tips pop up will appear

Step 9: Complete the **Purpose and Use** section

Step 10: Click **Next**

The screenshot shows a multi-step form titled "Privacy" and "Purpose and Use".

Step 8: A question asks "Does this engagement involve processing Sensitive Personal Information?" with radio buttons for "Yes" and "No". A callout box below provides a definition: "Personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, or trade union membership, as well as genetic data, biometric data for the purpose of uniquely identifying a natural person, data concerning health or data concerning a natural person's sex life or sexual orientation."

Step 9: A question asks "Will the personal information be used for any purpose other than that for which it was primarily collected?" with radio buttons for "Yes" and "No".

Step 10: A navigation bar at the bottom contains three buttons: "« Back", "Save & Continue", and "Next »". The "Next »" button is highlighted with a red border.

Step 11: Complete the **Policy** section

Note: For more information about about the words in blue, you can hover over them and a tips pop up will appear

Policy		
11	Will there be subcontractors or any other third parties working on your company's behalf that will be processing Personal Information? *	<input type="radio"/> Yes <input type="radio"/> No
	Will Personal Information be transferred across international borders by you or your subcontractors? *	<input type="radio"/> Yes <input type="radio"/> No
	Do you have an external privacy notice? *	<input type="radio"/> Yes <input type="radio"/> No
	Do you have documented policies and procedures detailing your organization's privacy practices and safeguards, including data handling and data retention(i.e. polices around hot, warm and cold backups for data, logical/physical segregation, legal holds, as well as other exceptions to the deletion requirements listed above)? *	<input type="radio"/> Yes <input type="radio"/> No
	Do you have documented policies and procedures on processing and managing data subject rights requests (practices in place to handle requests including but not limited to: Access, Correction, Deletion, Opt-Out, Portability)? *	<input type="radio"/> Yes <input type="radio"/> No
	Do you have documented policies and procedures to ensure the Personal Information processed is minimized only to what is strictly necessary to fulfill the business purpose? *	<input type="radio"/> Yes <input type="radio"/> No
	Do you have documented policies and procedures around how data is deleted/deprecated/segregated once it is no longer necessary for the purpose it was originally retained? *	<input type="radio"/> Yes <input type="radio"/> No
	Are employees required to take a privacy awareness training at minimum annually? *	<input type="radio"/> Yes <input type="radio"/> No
	Do employees (i.e. customer support agents) who have access to Personal Information receive role-specific training on data privacy protection practices? *	<input type="radio"/> Yes <input type="radio"/> No

Step 12: Complete the **Reporting** section

Step 13: Click **Next**

12

Reporting

Do you have a breach notification process that defines steps for reporting and notifying, in accordance with applicable laws and regulations, to include your notifications from your own processors/sub-processors? *

Yes No

Do you have a documented process for reporting and notifying privacy and/or security vulnerabilities of your or your processors'/sub-processors' systems? *

Yes No

Will you be able to report any breach to Intuit within 48 hours of detection? *

Yes No

13 « Back Save & Continue **Next** »

Note: If you need to go back and change any of your responses, click **Back**

Step 14: When you are ready to submit, click **Save & Send Updates**

Note: The 3PPA team will review your assessment and contact you via email if they require any further information or once the assessment is accepted

Tasks > Privacy Assessment v2.3 > Task: TP access 3PPA

Email

Review & Submit

Don't forget to click the **Save & Send Updates** button to submit your information to Intuit.

« Back Save & Send Updates

Click on a page title below to expand a section, or click the + to expand all sections.

- ▶ Data Privacy Assessment
- ▶ Purpose and Use
- ▶ Policy and Reporting

14 « Back Save & Send Updates

Additional support

For additional questions and reference guides, visit our [Supplier Programs page](#)

You can also reach out to us at SupplierConnect@Intuit.com