



## TEACHER CHECKLIST

COMPLETE THE FOLLOWING BEFORE TEACHING TURBOTAX

☐ **CONNECT TO TURBOTAX THROUGH THE EDUCATIONAL LINK.**

**Action step:**

Follow the directions on the first page of the Step-By-Step Guide  
You will be accessing an educational version of TurboTax

[https:// accounts.intuit.com/turbotaxonline/education](https://accounts.intuit.com/turbotaxonline/education)

This is different than the official TurboTax site.

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☐ **CREATE AN ACCOUNT.**

**Action step:**

Follow the directions on the first page of the Step-By-Step Guide  
Create a fictional email address that ends in "@intuiteducation.com"

Note: *You cannot re-access TurboTax's educational site even with the username and password that you created. Plan to complete the tax filing process in one session.*

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☐ **CHOOSE A PROFILE AND W2**

**Action step:**

There are several different W2 personas from which to choose for this activity. All will give students a similar experience in filing taxes, but there are variations in income, age, job, etc. Select one that suits you.

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☐ **CONTINUE FILING TAXES FOR THE SELECTED PERSONA**

**Action step:**

Follow the directions on Part 2 of the Step-By-Step Guide  
Navigate through TurboTax, enter information as prompted.  
Manually enter the W2 (*do not select auto-import, it will not work*).

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☐ **COMPLETE AND PRINT**

**Action step:**

When you get to the W2 summary screen (*shown on Part 3 of the Step-By-Step Guide*), you are ready to download or print the tax return. This is the final step for this activity, do not continue on TurboTax past this.



## STEP-BY-STEP GUIDE TO TURBOTAX

The following guide will help you log into TurboTax and then complete the tax simulation.

**Part 1** is to login to TurboTax. **Part 2** is doing taxes. **Part 3** is completing the tax return.

### PART 1: SIGN IN TO TURBOTAX

Go to TurboTax for Education at:  
[accounts.intuit.com/turbotaxonline/education](https://accounts.intuit.com/turbotaxonline/education) access

Create any 'fake' email address, but it **must end in**

**@intuiteducation.com**

*Example: ThisIsMyEmail@intuiteducation.com*

Your User ID matches your email address

**Add the phone number: 555-555-5555**

*Uncheck 'verify' box*

**Suggested Password: Turbotax1234!**

**Then press "Create Account"**

This is a test account.

### Create an Intuit account

One account for everything Intuit, including TurboTax. [Learn more](#)

Email address: StudentName@intuiteducation.com ✓

Confirm email: StudentName@intuiteducation.com ✓

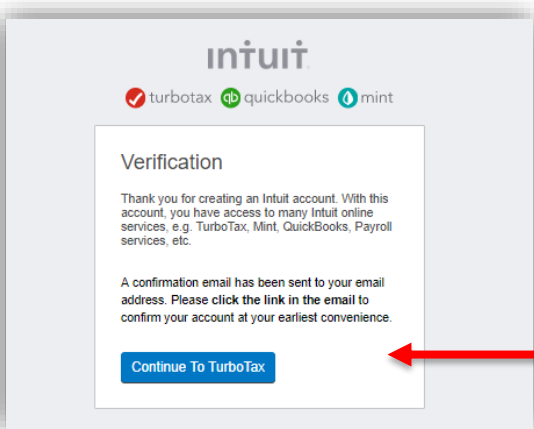
User ID: ThisIsMyEmail ✓

Phone (recommended): (555) 555-5555  
Standard call, messaging or data rates may apply.  
 Verify with text message (most secure)

Password: ..... ✓  
Your password is STRONG.

Confirm password: ..... ✓

[Create Account](#)



On the next screen, ignore the verification prompt and simply press "Continue To TurboTax"

## PART 2: DOING YOUR TAXES

Tell us about you - we'll recommend the right tax solution

I want to maximize deductions and credits

I have a job (received W-2)

I paid rent

I own a home

I have children or dependents

I want a CPA to review my return

I donated to charity

I'm paying off student loans

turbotax. You can do it

turbotaxlive Do your taxes with a CPA

America's #1 brand of tax software

| Free Edition                                      | Deluxe <small>MOST POPULAR</small>                      | Premier   | Self-E  |
|---|---|---|---|
| Simple tax returns                                | Maximize tax deductions and credits                     | Investments and rental property                         | Personal & expenses                                     |
| \$0 Fed. \$0 State. \$0 File.                     | \$59.99*<br><small>State additional</small>             | \$79.99*<br><small>State additional</small>             | \$119.99*<br><small>State additional</small>            |
| <b>File for \$0</b>                               | Start for Free<br><small>Pay only when you file</small> | Start for Free<br><small>Pay only when you file</small> | Start for Free<br><small>Pay only when you file</small> |
| ★★★★★<br><small>(4.41/5   102738 reviews)</small> | ★★★★★<br><small>(4.41/5   102738 reviews)</small>       | ★★★★★<br><small>(4.47/5   15405 reviews)</small>        | ★★★★★<br><small>(4.47/5   15405 reviews)</small>        |

There are many steps and pages to completing taxes.

On the first screen, select that you have a job with a W-2.

Then scroll down and choose Free Edition: **“File for \$0”**

As you move through TurboTax, a couple of general tips.

1. On every screen, you'll have to click or enter information in order to continue.

2. You will be asked many questions.

The answers provided on the W2 provide many answers, such as Soc Sec number and occupation.

You might be asked a question for which you aren't sure of an answer. *See the following page for answers to confusing questions*

3. There are about 20 screens to click through before getting to the section to enter W2 financial information.

4. This TurboTax for Education requires users to manually type in tax information and W2s because it is all fictional. TurboTax may ask to auto-import, but you cannot do that.

How are you feeling about doing your taxes?

Good

Not so good

Don't ask

Continue

Date of birth

mm/dd/yyyy

Social Security number [Learn more](#)

xxx-xx-xxxx

Occupation [Learn more](#)

Example: student, retired, engineer

Continue

Skip Import

## THINGS TO KNOW DURING THE PROCESS



**Last year:** You used “other tax software”

### Personal info:

See worksheet simulations with all information needed to file your taxes.

You'll see occupation, date of birth, SSN, phone number, and more.

### Financial picture:

Read the paragraph on your W-2 closely to learn how to answer.

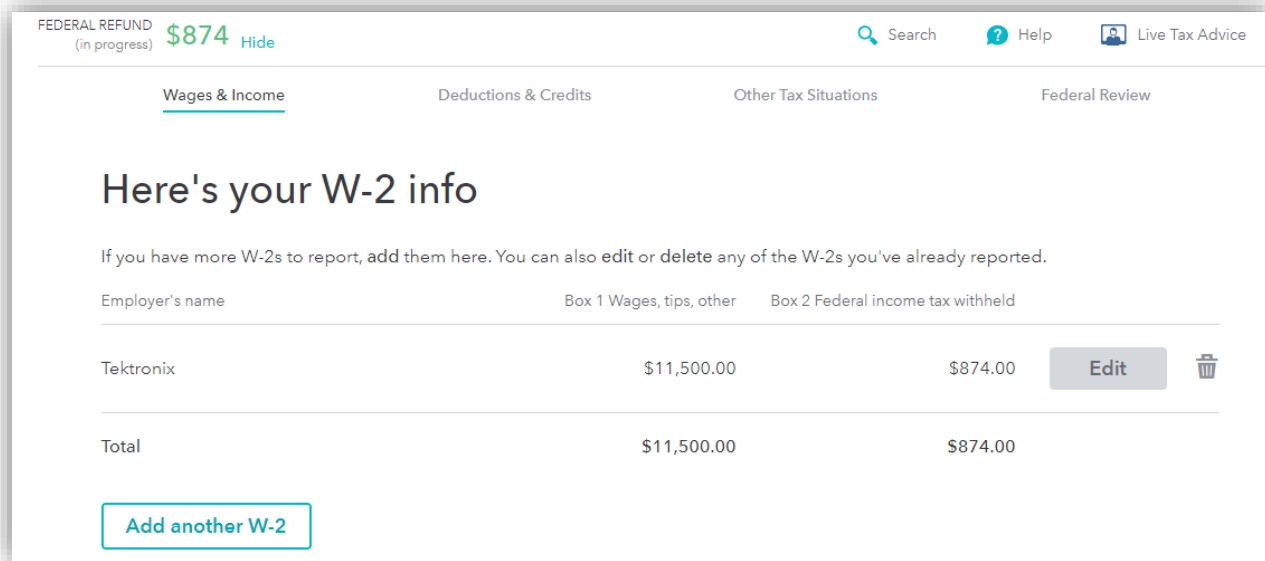
### Miscellaneous information:

- You are independent and cannot be claimed by anyone else
- If boxes 7-14 on your W-2 are blank, leave them blank in TurboTax
- You had health coverage all year, **not** with a gov. assisted program
- You did/do NOT:
  - o Make money in another state
  - o Have dependents
  - o Receive retirement income, income from gambling, or other.

**EINs:** Your employer EINs are on the worksheet.

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When you get to the following screen, you are ready to finish (see Part 3)



FEDERAL REFUND (in progress) \$874 Hide

Search Help Live Tax Advice

Wages & Income Deductions & Credits Other Tax Situations Federal Review

### Here's your W-2 info

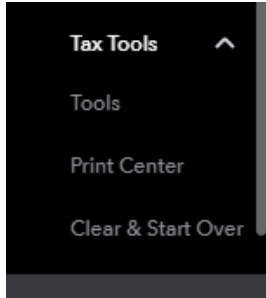
If you have more W-2s to report, add them here. You can also edit or delete any of the W-2s you've already reported.

| Employer's name | Box 1 Wages, tips, other | Box 2 Federal income tax withheld |      |    |
|-----------------|--------------------------|-----------------------------------|------|----|
| Tektronix       | \$11,500.00              | \$874.00                          | Edit | 🗑️ |
| Total           | \$11,500.00              | \$874.00                          |      |    |

Add another W-2

## PART 3: COMPLETE AND PRINT

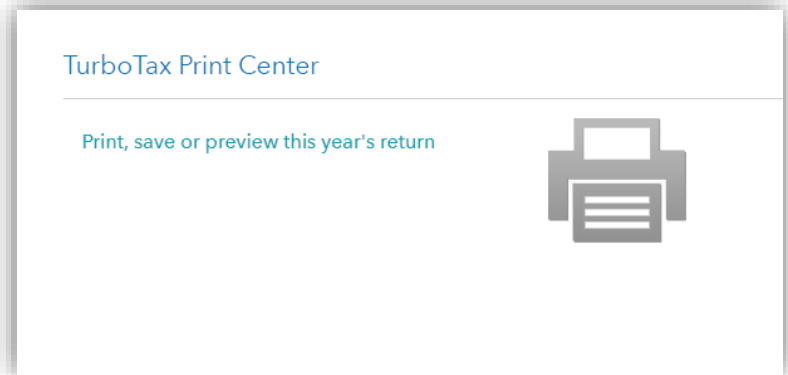
After getting to the W2 summary screen, you are ready to download or print your taxes.



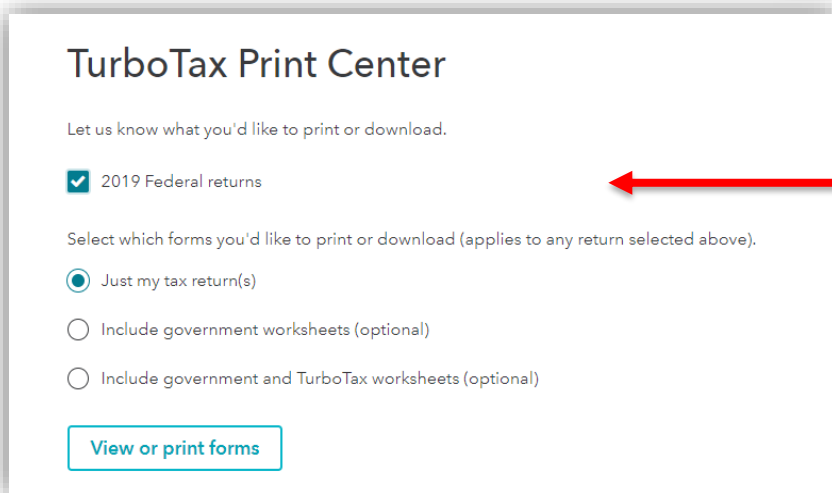
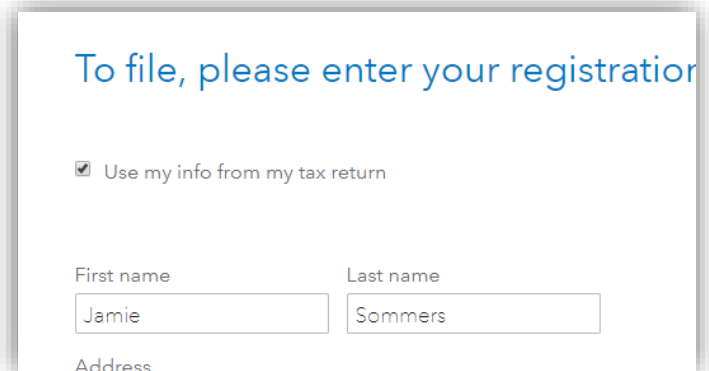
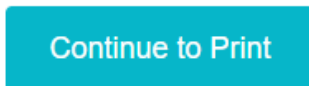
Click "Tax Tools" on the left side of the screen and click on "**Print Center**"



Click to print this year's tax return.  
Press continue



Select "Use my Info" to download your W-2s  
and Click "Continue to Print"



Choose **Federal** return.

Select just your tax return.

**SAVE or PRINT.** Once you log out or end your session, you won't be able to access this again!

**CONGRATULATIONS! YOU FILED TAXES!**