



Intuit Education: TurboTax Simulation

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Checklist



Complete the following before teaching TurboTax.

Connect to TurboTax through the educational link.

Follow the directions on Page 1 of the Start-Up Guide.

You will be accessing an educational version of TurboTax which is different than the official TurboTax site <https://myturbotax.intuit.com/sign-up/education>.

Create an account.

Follow the directions on Page 1 of the Start-Up Guide.

Create a fictional email address that ends in @intuiteducation.com.

Choose a profile and W2.

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

Continue filing taxes for the selected persona.

Follow the directions on Page 2 and 3 of the Start-Up Guide.

Navigate through TurboTax, enter information as prompted. Manually enter the W2 (*do not select auto-import, it will not work*).

Complete and print.

When you get to the W2 summary screen (*shown on Page 4 of the Start-Up 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.

Congratulations! You are ready to use the TurboTax simulations!

Guide to TurboTax



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

Step 1: Sign in to TurboTax.

Step 2-5: Doing taxes.

Step 6: Completing the tax return.

Step 1: Sign in to TurboTax.

Go to TurboTax for Education at:
<https://myturbotax.intuit.com/sign-up/education>

Create any 'fake' email address, but it **must end in @intuiteducation.com**

Example: taxesarefun@intuiteducation.com

Each time you access the link you will need to create a new account.

Your User ID matches your email address

Do NOT add a phone number

Uncheck 'verify' box

Suggested Password: Turbotax1234!

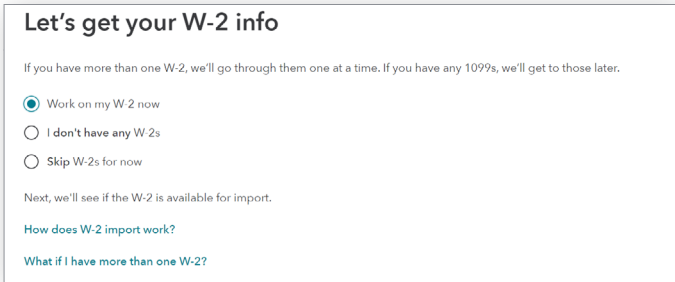
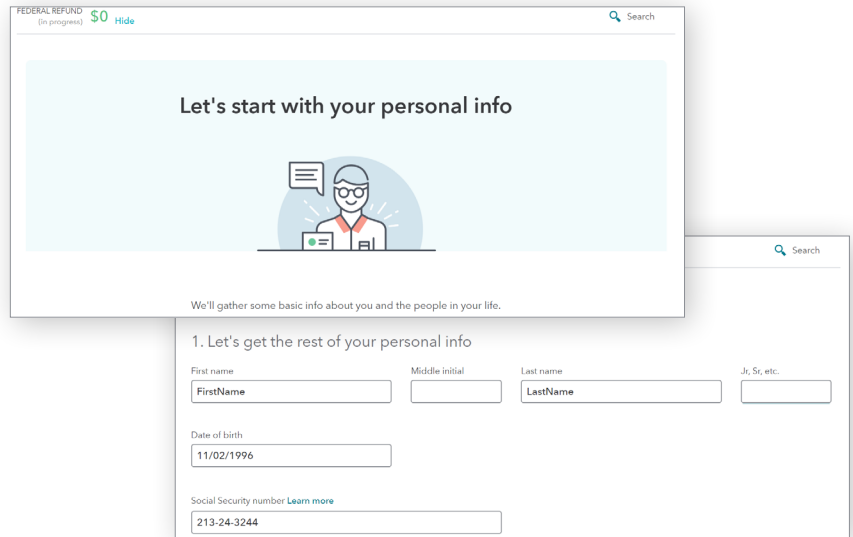
Then click **Create Account**

On the next screen, ignore the verification prompt and click

Continue To TurboTax

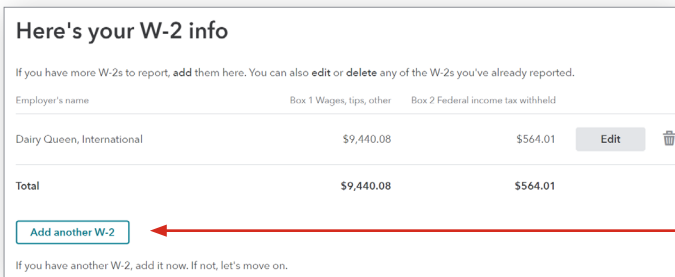
Step 2

There are many steps and pages to completing taxes. To get started, continue from the welcome screen to enter information from the W2 scenario including address, date of birth, and marital status. **Do not your own personal information.**

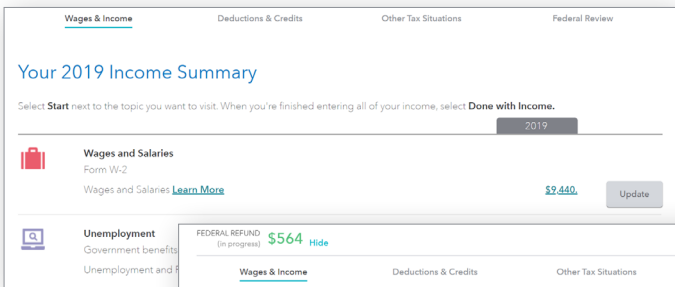


Step 3

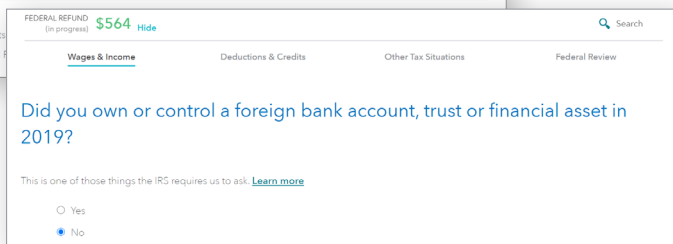
Next, you will be prompted to enter the W2 information including employer details, wages, and withholdings.



Once you have entered the W2, you will see a summary screen as well as the amount of the Federal return at the top of the screen. If your scenario has multiple W2s, click here to enter another, or continue.

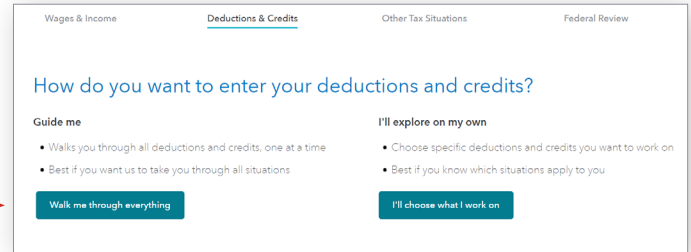


Following the W2 summary, TurboTax will show options and ask questions for additional forms of income. None of these apply; scroll down and continue through these screens.



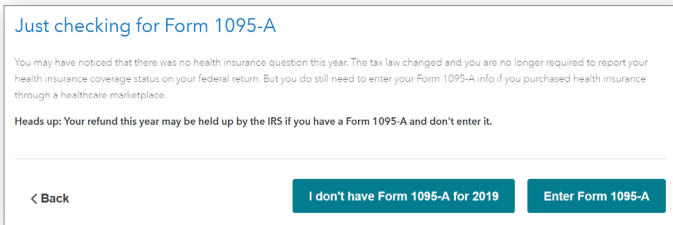
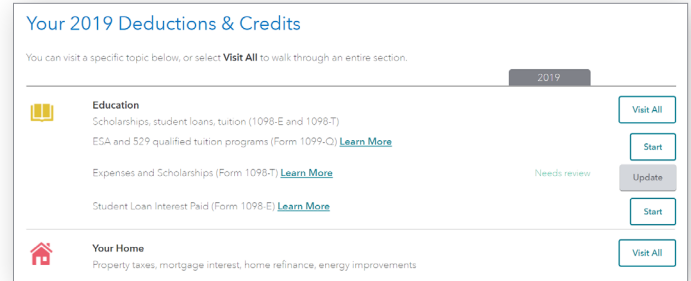
Step 4

In the next step, you will be prompted to click to choose how you want to enter deductions. Pressing either button will bring you to a page of all possible tax deductions.



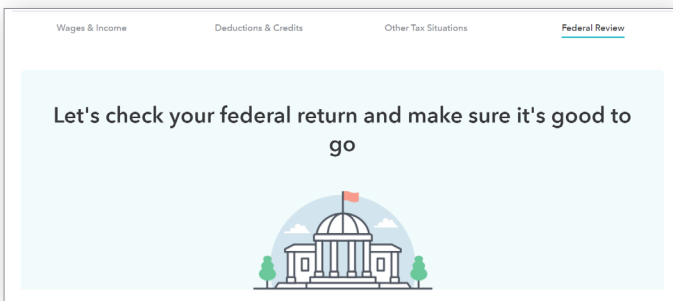
If your W2 scenario does not mention any deductions, then scroll down and continue through these screens.

If your W2 scenario does mention deductions, choose them from the list of deductions.



Step 5

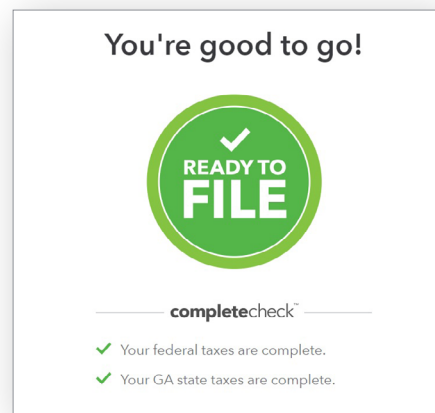
After deductions, TurboTax will ask about other tax situations and health insurance Form 1095-A. None of these apply; continue past these.



Next is the federal review – the last step before continuing to state.

There are many screens to complete in the state section of TurboTax. However; there is no new data or information to enter here. If you are ever unsure of a question, answer in a way that will not prompt for additional details.

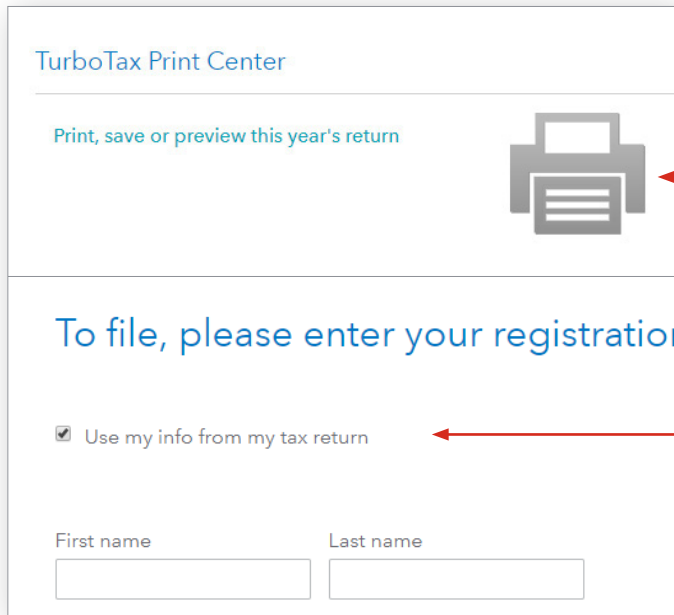
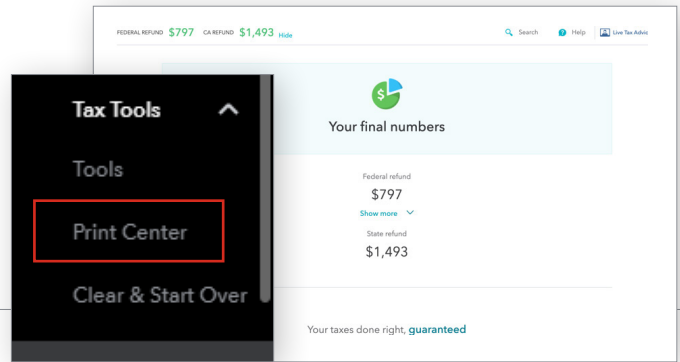
When you reach the following screen, you have finished filing.



Step 6: Complete and Print.

After getting to the W-2 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.

Click **Continue**

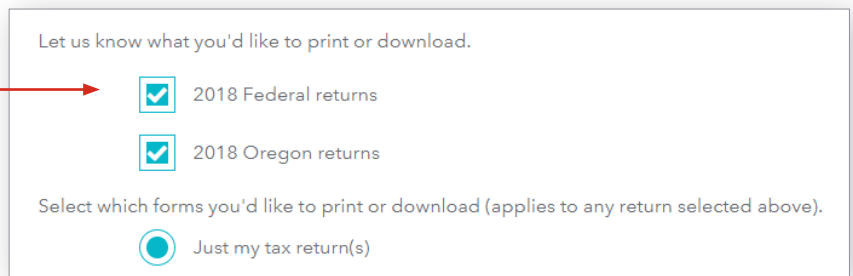
Select **Use my info** to download your W-2s.

Click **Continue to Print**

Choose **Federal** and **State** return.

Select **Just my 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!

W2 Descriptions



There are five W2s provided for students to use to file taxes with the Intuit Education TurboTax tool.

Each activity comes with an accompanying 'answer key' in the form of a summary page and Form 1040. These are the documents students would print or save after filing taxes.

- ✓ **Ezra Daniels**
The simplest of all the W2s, in this scenario the filer is a dependent high school student with a part-time job earning less than \$10,000 per year.

- ✓ **Ada Singh**
In this scenario, the filer is a college student with one job who earns under \$20,000 per year. In addition, Ada has a 1098-T from her college and has donated to charity.

- ✓ **Dirk Lohani**
The filer in this scenario is an independent young adult working for two different employers and has two W2s. Dirk earns almost \$30,000 per year from full-time employment.

- ✓ **Karissa Rettig**
This scenario is more complex; the filer is a full-time employee who filled out his W4 with too many allowances. As a result, Karissa will owe money instead of receiving a refund.

The estimated time for these activities is 30-45 minutes and includes the time to connect to TurboTax and print or save the tax return.