



Intuit Education: Student Activities

- > Scenario 1: Ezra Daniels
- > Scenario 2: Ada Singh
- > Scenario 3: Dirk Lohani
- > Scenario 4: Karissa Rettig



Filing Your Taxes



W-2 Scenario: Ezra Daniels

Ezra is a high school senior; he works at The Home Depot as a sales associate, approximately 10 hours per week during the school year and 30 during the summer. He received this W-2 from his employer in February and needs to file his taxes for the first time. He heard about the IRS Free File Program but he is a bit nervous to file taxes for the first time.

Ezra is 18 and lives at home, his parents do not claim him as a dependent. For tax purposes, he is single, and has one job. Ezra's birthday is July 21, 2001.

Ezra doesn't pay rent, and has no other complex expenses (deductions).

a Employee's social security number 024-32-2020		Safe, accurate, FAST! Use		Visit the IRS website at www.irs.gov/efile	
b Employer identification number (EIN) 44-7293754		1 Wages, tips, other compensation 9440.08	2 Federal income tax withheld 564.01		
c Employer's name, address, and ZIP code The Home Depot 3422 Pleasant Hill Road Irvine, CA 92664		3 Social security wages 9440.08	4 Social security tax withheld 585.28		
		5 Medicare wages and tips 9440.08	6 Medicare tax withheld 136.88		
		7 Social security tips	8 Allocated tips		
d Control number		9	10 Dependent care benefits		
e Employee's first name and initial Last name Suff. Ezra Daniels 624 Liberty Avenue Irvine, CA 92664		11 Nonqualified plans	12a See instructions for box 12		
		13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	12b		
		14 Other	12c		
			12d		
f Employee's address and ZIP code					
15 State CA	Employer's state ID number 618726437	16 State wages, tips, etc. 9440.08	17 State income tax 597.00	18 Local wages, tips, etc.	19 Local income tax
				20 Locality name	

Form W-2 Wage and Tax Statement 2019 Department of the Treasury—Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return.
This information is being furnished to the Internal Revenue Service.

There is no other information about Ezra that you need to file his taxes. However, at times you may be asked questions by TurboTax such as "Did Ezra serve in the National Guard" or "Is Ezra legally Blind". Answer "no" to questions like these.

Filing Your Taxes



W-2 Scenario: Ada Singh

Ada is a part-time college student at Linn Community College and she works at Regal Cinemas as an office assistant. Ada received this W-2 from her employer along with the 1098-T from her college. Ada also made a charitable donation this year and got a document as proof. She needs to file her taxes - something she has never done before!

Ada rents an apartment with two roommates, she pays her own living expenses - her parents do not claim her as a dependent. For tax purposes, she is single, and has one job. Ada's birthday is September 16, 1999.

Ada will need to enter the 1098-T and charity donation in the deductions section.

a Employee's social security number 068-43-1568		Safe, accurate, FAST! Use		Visit the IRS website at www.irs.gov/efile	
b Employer identification number (EIN) 41-6453210		1 Wages, tips, other compensation 18,200.00		2 Federal income tax withheld 1,030.12	
c Employer's name, address, and ZIP code Regal Cinemas 2848 Ashford Drive Centerville, VA 22020		3 Social security wages 18,200.00		4 Social security tax withheld 1,128.40	
		5 Medicare wages and tips 18,200.00		6 Medicare tax withheld 263.90	
		7 Social security tips		8 Allocated tips	
d Control number		9		10 Dependent care benefits	
e Employee's first name and initial Last name Suff. Ada Singh 2968 Perine Street Centerville, VA 22020		11 Nonqualified plans		12a See instructions for box 12	
		13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b	
		14 Other		12c	
				12d	
f Employee's address and ZIP code		15 State Employer's state ID number VA 0187503586		16 State wages, tips, etc. 18,200.00	
		17 State income tax 1,300.00		18 Local wages, tips, etc.	
				19 Local income tax	
				20 Locality name	

Form **W-2** Wage and Tax Statement **2019** Department of the Treasury—Internal Revenue Service
Copy B—To Be Filed With Employee's FEDERAL Tax Return.
This information is being furnished to the Internal Revenue Service.

Ada's 1098-INT


FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number		1 Payments received for qualified tuition and related expenses	OMB No. 1545-1574	Tuition Statement
Linn-Benton Community College 6500 Pacific Blvd SW, Uniontown, VA 20121		\$ 2,400.00	2019	
FILER'S employer identification no. 930561307		STUDENT'S SSN 068-43-1568	3	Copy B For Student This is important tax information and is being furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the tax preparer or use it to prepare the tax return.
STUDENT'S name Ada Singh		4 Adjustments made for a prior year	5 Scholarships or grants	
Street address (including apt. no.) 2968 Perine Street		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January—March 2020 <input type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code Centerville, VA 22020		9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund	
Service Provider/Acct. No. (see instr.)	8 Check if at least half-time student <input checked="" type="checkbox"/>			

Form **1098-T** (keep for your records) www.irs.gov/Form1098T Department of the Treasury - Internal Revenue Service

Other information about Ada's 1098-INT:

She also spent \$600 on books and materials for classes but has no scholarships or grants.
 This is her 2nd year of part-time college, she is working on an associate's degree.
 She has never before received a college tax credit.
 She has never committed a crime.

Ada's Charitable Donation

THANK YOU FOR YOUR DONATION TO UNITED WAY	
Here are the details of your transaction for your tax records:	
Amount: \$200.00 United Way EIN: 13-1635294	
Transaction ID: 3748539 Date: 05/10/2019 Payment Type: Check	
Personal Information: Ada Singh 2968 Perine Street Centerville, VA 22020	
 1 United Way Sudley, VA 20109	

There is no other information about Ada that you need to file her taxes. However, at times you may be asked questions by TurboTax such as "Did Ada serve in the National Guard" or "Did Ada own a foreign bank account". Answer "no" to questions like these.

Filing Your Taxes




W-2 Scenario: Dirk Lohani

Dirk is in his 20s and working full time and living in New York. He worked part of the year for EvoTek Logistics before getting a job at Nike working as a Warehouse Coordinator. Dirk received both W2 from EvoTek Logistics and Nike and needs to file his taxes. In the past, he had somebody do taxes for him. This year, he is excited to use the IRS's Free File Program on his own because it is free!

Dirk lives with his uncle to save money, but is officially 'independent'. For tax purposes, he is single and has one job. Dirks's birthday is November 4, 1996.

Dirk has no dependents and has no other complex expenses (deductions).

a Employee's social security number 265-16-6451		OMB No. 1545-0008		Safe, accurate, FAST! Use 		Visit the IRS website at www.irs.gov/efile	
b Employer identification number (EIN) 93-0573541				1 Wages, tips, other compensation 15,860		2 Federal income tax withheld 1176.00	
c Employer's name, address, and ZIP code Nike, Inc. 900 Corporate Blvd Newburgh, NY 12250				3 Social security wages 15,860		4 Social security tax withheld 983.32	
				5 Medicare wages and tips 15,860		6 Medicare tax withheld 229.97	
				7 Social security tips		8 Allocated tips	
d Control number				9		10 Dependent care benefits	
e Employee's first name and initial Last name Suff. Dirk Lohani 100 Meadow Hill Road Newburgh, NY 12250				11 Nonqualified plans		12a See instructions for box 12	
				13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b	
				14 Other		12c	
						12d	
f Employee's address and ZIP code							
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name	
NY	93058454	15,860	591.42				

Form **W-2** Wage and Tax Statement **2019**

Department of the Treasury—Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return.
This information is being furnished to the Internal Revenue Service.

a Employee's social security number 265-16-6451		Safe, accurate, FAST! Use		Visit the IRS website at www.irs.gov/efile	
b Employer identification number (EIN) 93-6187540		1 Wages, tips, other compensation 11,500		2 Federal income tax withheld 640.00	
c Employer's name, address, and ZIP code EvoTek Logistics 1400 Orr Avenue Bldg 3 Newburgh, NY 12250		3 Social security wages 11,500		4 Social security tax withheld 713.00	
		5 Medicare wages and tips 11,500		6 Medicare tax withheld 166.75	
		7 Social security tips		8 Allocated tips	
d Control number		9		10 Dependent care benefits	
e Employee's first name and initial Last name Suff. Dirk Lohani 100 Meadow Hill Road Newburgh, NY 12250		11 Nonqualified plans		12a See instructions for box 12	
		13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b	
		14 Other		12c	
f Employee's address and ZIP code				12d	
15 State Employer's state ID number NY 680465849	16 State wages, tips, etc. 11,500	17 State income tax 326.25	18 Local wages, tips, etc.	19 Local income tax	20 Locality name

Form **W-2** Wage and Tax Statement

2019

Department of the Treasury — Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return.
This information is being furnished to the Internal Revenue Service.

There is no other information about Dirk that you need to file his taxes. However, at times you may be asked questions by TurboTax such as "Did Dirk serve in the National Guard" or "Did Dirk own a foreign bank account". Answer "no" to questions like these.

In the state section of TurboTax, New York asks many additional questions:

If asked, Newburgh, NY is in Orange County of New York. The school district is Newburgh Enlarged City School District.

If prompted to enter Drivers License or State ID, choose "I don't have any of these".

Filing Your Taxes



W-2 Scenario: Karissa Rettig

Karissa is an independent adult working full-time at Banfield Pet Clinic as a veterinarian assistant. She received a W2 from her employer in January and needs to file her taxes! Last year, Karissa changed her W4 and indicated she had 6 allowances even though that is not accurate. Karissa noticed that her bi-weekly paycheck went up by over \$100 after the change. Last year she got a \$500 federal tax refund.

Karissa rents an apartment with a roommate, she has been independent several years. For tax purposes, she is single, and has one job. Karissa's birthday is August 11, 1992.

Karissa has no dependents and has no other complex expenses (deductions).

a Employee's social security number 398-49-6480		Safe, accurate, FAST! Use		Visit the IRS website at www.irs.gov/efile	
b Employer identification number (EIN) 92-0123456		1 Wages, tips, other compensation 34,500.00	2 Federal income tax withheld 1555.00		
c Employer's name, address, and ZIP code Banfield Pet Clinic 279 Northgate Drive Suite 1231 Kansas City, MO 64106		3 Social security wages 34,500.00	4 Social security tax withheld 2139.00		
		5 Medicare wages and tips 34,500.00	6 Medicare tax withheld 500.25		
		7 Social security tips	8 Allocated tips		
d Control number		9	10 Dependent care benefits		
e Employee's first name and initial Last name Suff. Karissa Rettig 965 Spring Court Apt. #12 Kansas City, MO 64106		11 Nonqualified plans	12a See instructions for box 12		
		13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	12b		
		14 Other	12c		
			12d		
f Employee's address and ZIP code		15 State Employer's state ID number MO 935135121	16 State wages, tips, etc. 34,500.00	17 State income tax 1,428.00	18 Local wages, tips, etc.
					19 Local income tax
					20 Locality name

W-2 Wage and Tax Statement **2019** Department of the Treasury—Internal Revenue Service

Form **W-2** **Copy B—To Be Filed With Employee's FEDERAL Tax Return.**
This information is being furnished to the Internal Revenue Service.

There is no other information about Karissa that you need to file her taxes. However, at times you may be asked questions by TurboTax such as "Did Karissa serve in the National Guard" or "Did Karissa own a foreign bank account".

Answer "no" to questions like these.

