



# 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](mailto:@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](mailto: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**

This is a test account.

### Create an Intuit account

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

Email address: Taxesarefun@intuiteducation.com ✓

Confirm email: Taxesarefun@intuiteducation.com ✓

User ID: Taxesarefun@intuiteducation.com ✓

Phone (recommended): [Empty field]

Standard call, messaging or data rates may apply.

Verify with text message (most secure)

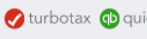


Password: [Masked] ✓

Your password is STRONG.

Confirm password: [Masked] ✓

**Create Account**

### intuit

#### Verification

Thank you for creating an Intuit account. With this account, you have access to many Intuit online services, e.g. TurboTax, Mint, QuickBooks, Payroll services, etc.

A confirmation email has been sent to your email address. Please click the link in the email to confirm your account at your earliest convenience.

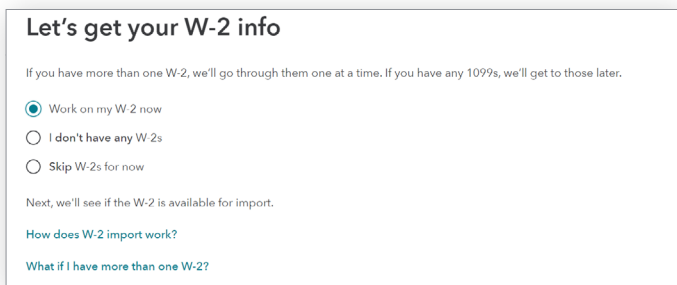
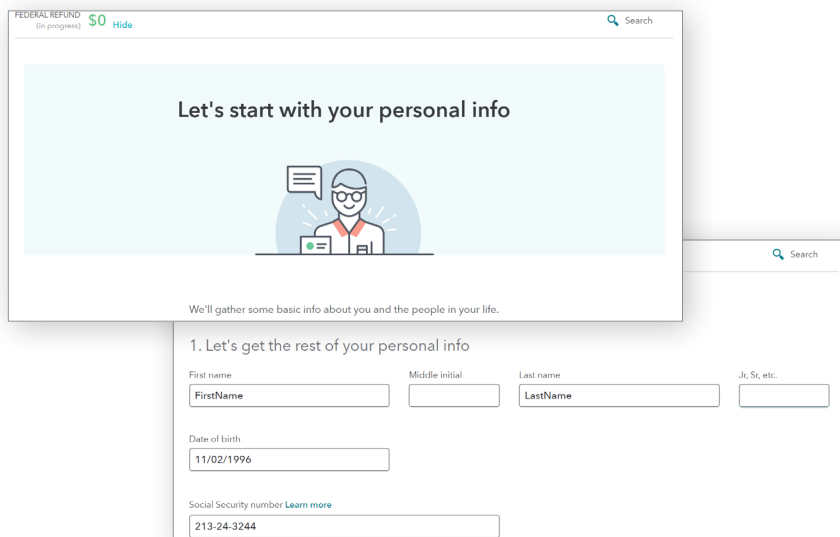
**Continue To TurboTax**

On the next screen, ignore the verification prompt and click

**Continue To TurboTax**

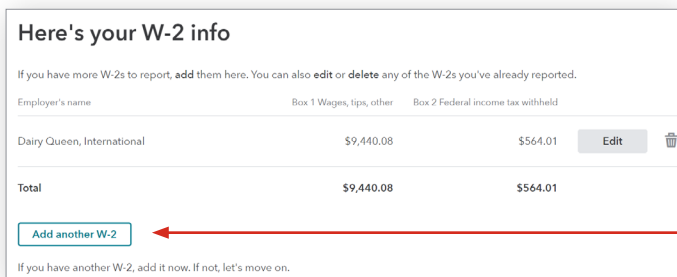
## Step 2

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.**

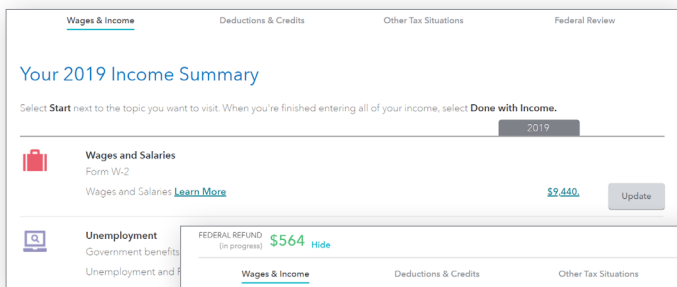


## Step 3

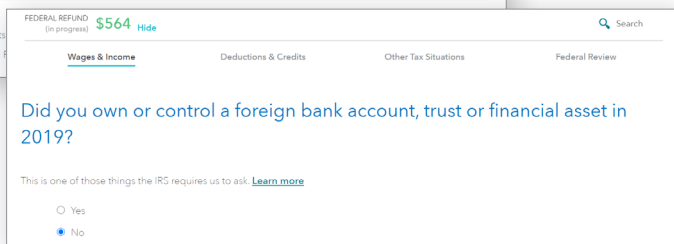
Next, you will be prompted to enter the W2 information including employer details, wages, and withholdings.



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.

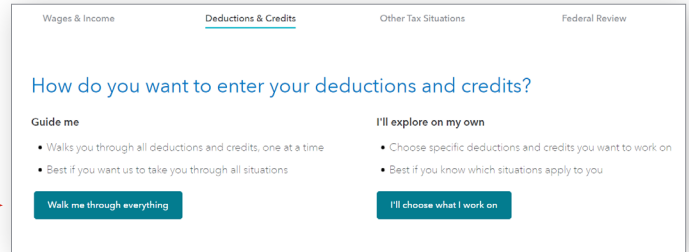


Following the W2 summary, TurboTax will show options and ask questions for additional forms of income. None of these apply; scroll down and continue through these screens.



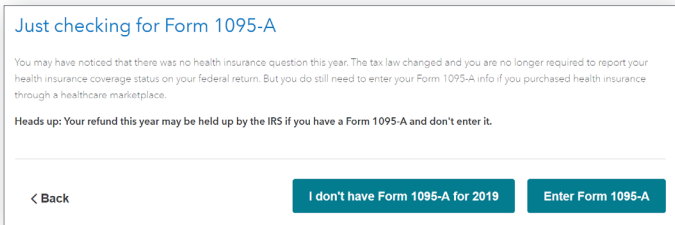
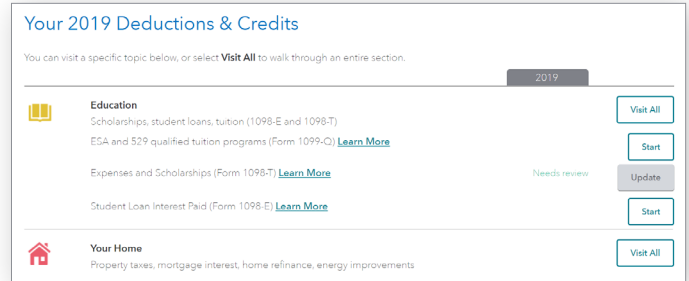
### Step 4

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.



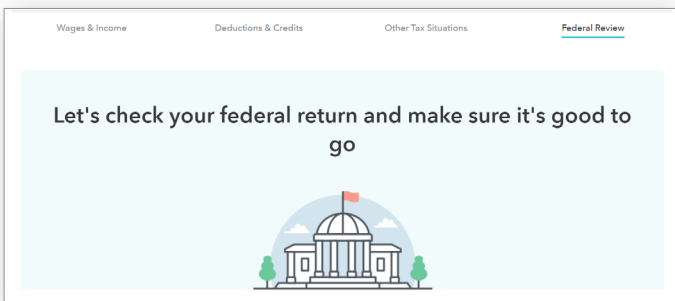
If your W2 scenario does not mention any deductions, then scroll down and continue through these screens.

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



### Step 5

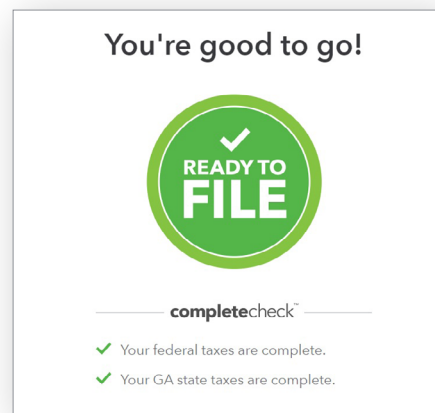
After deductions, TurboTax will ask about other tax situations and health insurance Form 1095-A. None of these apply; continue past these.



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.

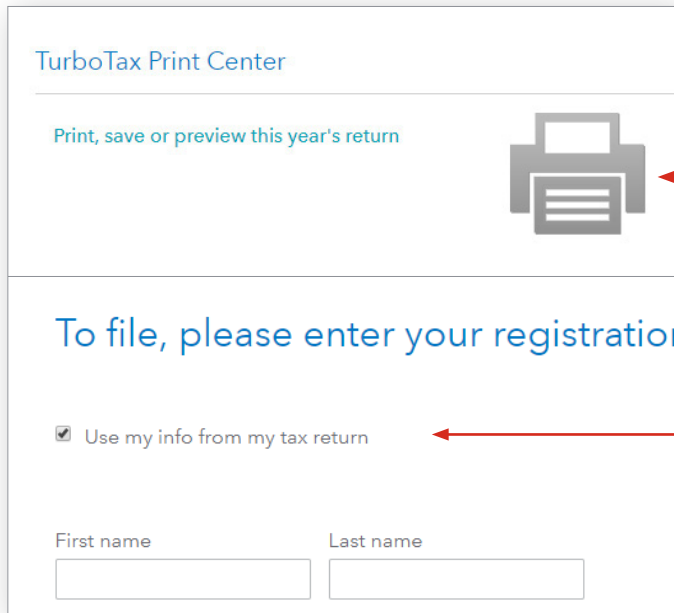
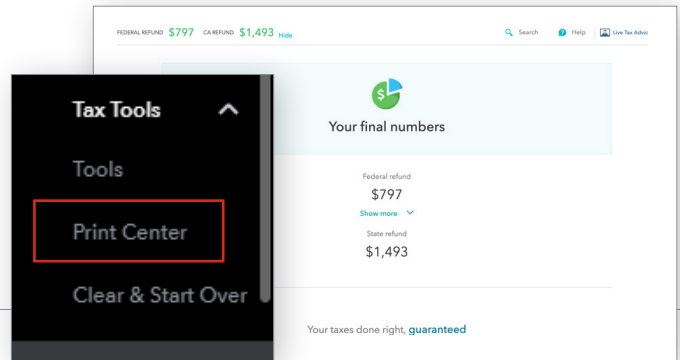
When you reach the following screen, you have finished filing.



### 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**

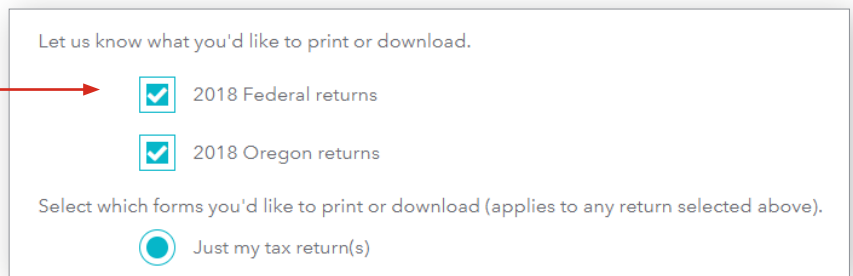
Select **Use my info** to download your W-2s.

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.

# 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 claim him as a dependent. For tax purposes, he is single, has one job and doesn't pay for his own living expenses. Ezra's birthday is December 21, 2002.

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 <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>	
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 Employer's state ID number CA   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** 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.

If asked, Irvine is in the county of Orange.

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 <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>	
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			
f Employee's address and ZIP code				12d			
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	
VA	0187503586	18,200.00	1,300.00				

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

When asked about the stimulus payment, Ada received a \$1200 payment in 2020.

### Ada's 1098-INT

CORRECTED

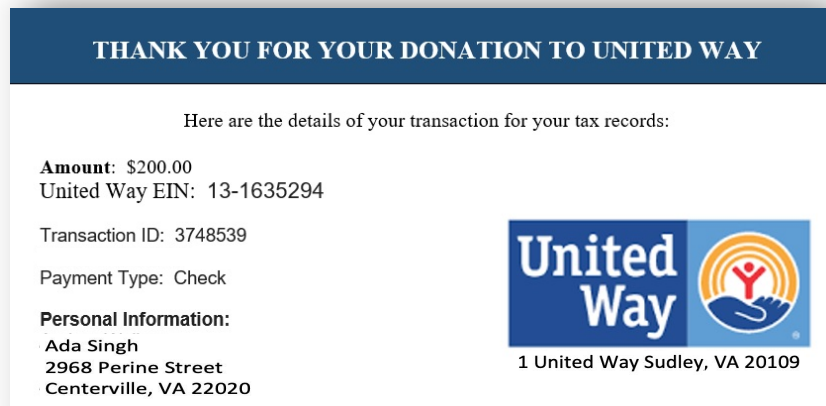
FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number  <b>Linn-Benton Community College</b> 6500 Pacific Blvd SW, Uniontown, VA 20121		<b>1</b> Payments received for qualified tuition and related expenses \$ 2,400.00 <b>2</b>	OMB No. 1545-1574  Form <b>1098-T</b>	<b>Tuition Statement</b>
FILER'S employer identification no. 930561307	STUDENT'S SSN 068-43-1568	<b>3</b>		<b>Copy B For Student</b>  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		<b>4</b> Adjustments made for a prior year \$	<b>5</b> Scholarships or grants \$ 0	
Street address (including apt. no.) 2968 Perine Street		<b>6</b> Adjustments to scholarships or grants for a prior year \$	<b>7</b> 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		<b>9</b> Checked if a graduate student <input type="checkbox"/>	<b>10</b> Ins. contract reimb./refund \$	
Service Provider/Acct. No. (see instr.)	<b>8</b> Check if at least half-time student <input checked="" type="checkbox"/>			

Form **1098-T** (keep for your records) [www.irs.gov/Form1098T](http://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 2<sup>nd</sup> 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



Ada made a \$200 one-time deduction to the United Way.

This can be entered in the deductions section.

If asked, Ada lives in Fairfax County.

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 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 <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>			
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 Dirk Lohani		Last name Lohani		Suff.		11 Nonqualified plans		12a See instructions for box 12	
f Employee's address and ZIP code 100 Meadow Hill Road Newburgh, NY 12250			13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b			12c	
			14 Other		12d				
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 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.

When asked about the stimulus payment, Dirk received a \$1200 payment in 2020.

<b>a</b> Employee's social security number 265-16-6451		OMB No. 1545-0008 Safe, accurate, FAST! Use		Visit the IRS website at <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>	
<b>b</b> Employer identification number (EIN) 93-6187540		<b>1</b> Wages, tips, other compensation 11,500	<b>2</b> Federal income tax withheld 640.00		
<b>c</b> Employer's name, address, and ZIP code EvoTek Logistics 1400 Orr Avenue Bldg 3 Newburgh, NY 12250		<b>3</b> Social security wages 11,500	<b>4</b> Social security tax withheld 713.00		
		<b>5</b> Medicare wages and tips 11,500	<b>6</b> Medicare tax withheld 166.75		
		<b>7</b> Social security tips	<b>8</b> Allocated tips		
<b>d</b> Control number		<b>9</b>	<b>10</b> Dependent care benefits		
<b>e</b> Employee's first name and initial      Last name      Suff. Dirk Lohani 100 Meadow Hill Road Newburgh, NY 12250		<b>11</b> Nonqualified plans		<b>12a</b> See instructions for box 12	
		<b>13</b> Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>	<b>12b</b>		
		<b>14</b> Other		<b>12c</b>	
<b>f</b> Employee's address and ZIP code				<b>12d</b>	
<b>15</b> State NY	Employer's state ID number 680465849	<b>16</b> State wages, tips, etc. 11,500	<b>17</b> State income tax 326.25	<b>18</b> Local wages, tips, etc.	<b>19</b> Local income tax
				<b>20</b> Locality name	

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

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 School District.

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

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.

# 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		OMB No. 1545-0008		Safe, accurate, FAST! Use 		Visit the IRS website at <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>	
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			
f Employee's address and ZIP code				12d			
15 State MO	Employer's state ID number 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	

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

When asked about the stimulus payment, Karissa received a \$1200 payment in 2020.

If asked on the state return, Kansas City is in Jackson county.

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.

