



## FILING YOUR TAXES: A TURBO TAX SIMULATION STUDENT DIRECTIONS

### Overview

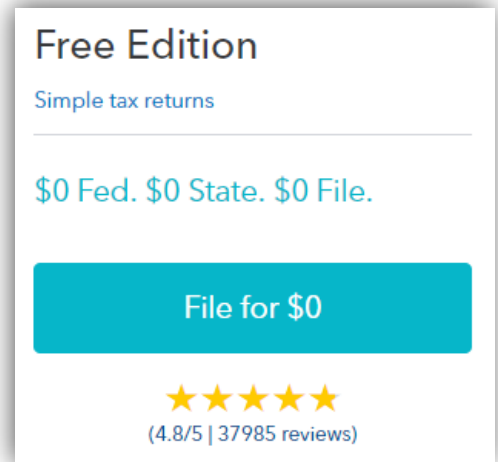
In today's activity, you will be learning about and using **TurboTax** – a financial tool used by millions of people to file their taxes. Since every person's financial information is private, when you log in to **Mint**, you will be looking at data for a fictional persona for whom you are filing their taxes for them.

The goal today is to learn about TurboTax and the process of filing taxes. You do not have to worry about breaking anything once you are in TurboTax. In fact, you can click and poke around in TurboTax as much as you like!

### Filing Taxes Directions

The Step-By-Step Guide is a multi-page walkthrough of how to file taxes. This includes logging into TurboTax for the first time. There are a lot of steps and parts, so use it throughout the process.

The one or two-page W2 Worksheet gives you background information and the documents for your fictional user. You will be filing taxes for that person.



### **DISCLAIMER:**

To access TurboTax successfully, use the same computer or device every time or you will be forced to re-create a new account. Also, keep your username and password recorded in a safe place.

**If you lose your login information, there is no way to reset or recover it.**



## FILING YOUR TAXES: A TURBO TAX SIMULATION STEP-BY-STEP GUIDE

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

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

### PART 1: SIGN IN TO TURBOTAX

Use [accounts.intuit.com/turbotaxonline/education](https://accounts.intuit.com/turbotaxonline/education) to access TurboTax with your **Student account**.

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

**@intuiteducation.com**

*Example: ThisIsMyEmail@intuiteducation.com*

Your User ID matches your email address

**Do not** add a phone number

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: ThisIsMyEmail@intuiteducation.com ✓

Confirm email: ThisIsMyEmail@intuiteducation.com ✓  
ThisIsMyEmail@intuiteducation.com ✓

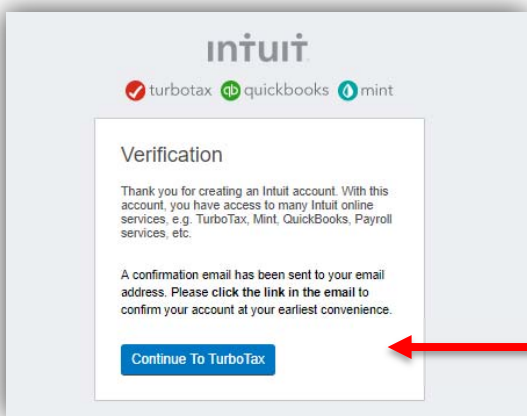
User ID: MyMadeUpID ✓

Phone (recommended): [Empty field] ⚠  
We strongly recommend adding a phone number. This will help verify your account and keep it safe.

Password: [Masked] ✓  
Your password is STRONG.

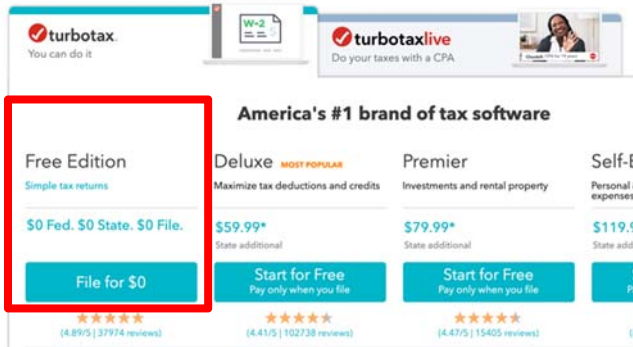
Confirm password: [Masked] ✓

[Create Account](#)



On the next screen, press **"continue"** and **wait.**

## PART 2: DOING YOUR TAXES

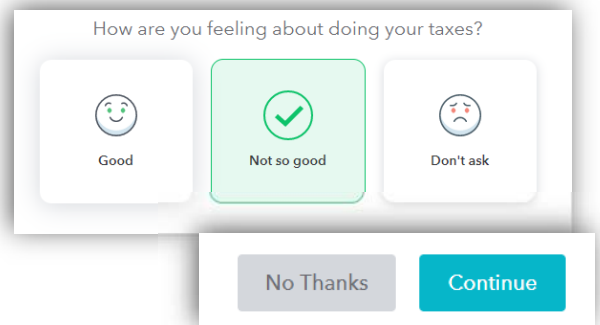


There are many steps and pages to completing taxes.

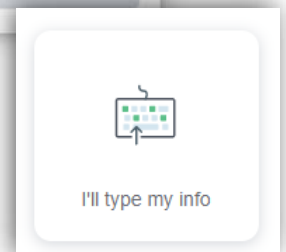
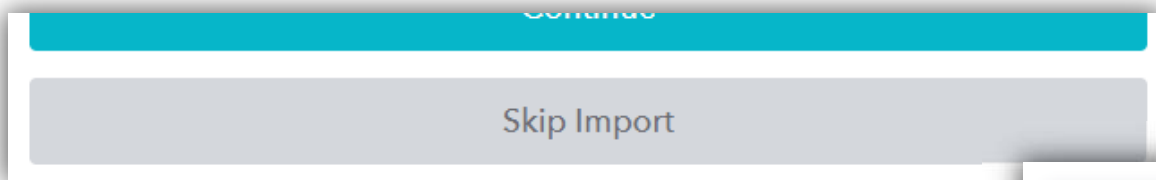
On the first screen, scroll down and click  
**“File for \$0”**

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

1. On most screens, you'll have to click or enter information before pressing **continue** or before the word continue will appear.
2. You might be asked a question for which you aren't sure of an answer. **See the following page for answers to most every question you might be asked.** (*you are not a war veteran or legally blind*). TurboTax will ask a lot of questions about the simulation.



3. We have to manually type in **ALL** tax information and W2s because it is all fictional. TurboTax will ask to auto-import, but you cannot do that.



## THINGS TO KNOW DURING THE PROCESS

If TurboTax asks you about...

**Last year:** You used “other tax software” to file your taxes.

**Financial picture:** Read the paragraph on your W-2 closely to learn about your simulation.

### Miscellaneous information:

- You had health coverage all year, **not** with a gov. assisted program
- 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

### 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.

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



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When you get to the following screen you have completed entering all W-2 information and can wrap up the income section.

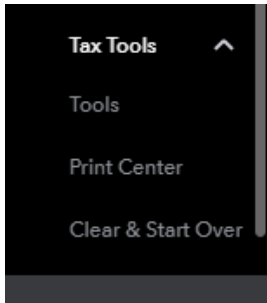
### Here's your W-2 info

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.

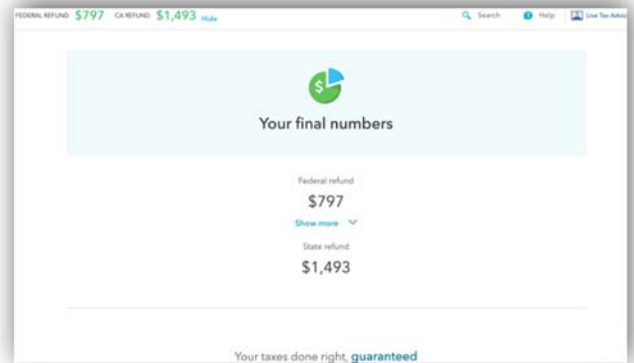
Employer's name	Box 1 Wages, tips, other	Box 2 Federal income tax withheld		
Tektronix Foundation	\$11,500.00	\$874.00	Edit	🗑️
NIKE INC	\$15,860.00	\$1,125.98	Edit	🗑️
Total	\$27,360.00	\$1,999.98		

## PART 3: COMPLETE AND PRINT

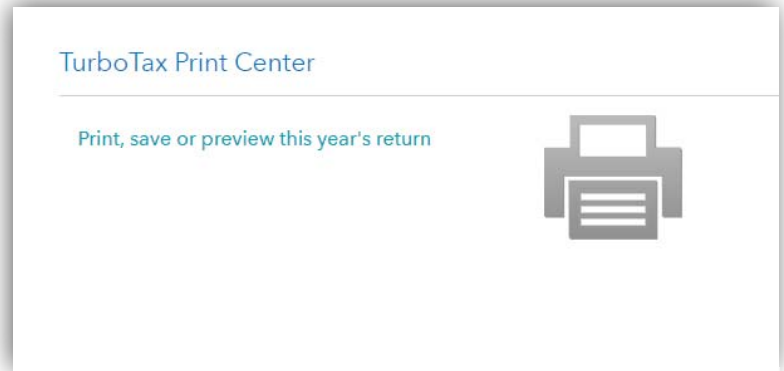
After getting to the W2 summary screen, you are ready to download or print your taxes.



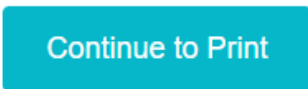
Click "Tax Tools" on the left side of the screen and click on "**Print Center**"



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



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



Finally, choose **State & Federal** return to download.

**CONGRATULATIONS ! YOU FILED TAXES !**

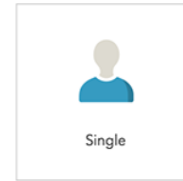


## FILING YOUR TAXES: A TURBO TAX SIMULATION

### W2 WORKSHEET

#### W2 Scenario 1: Antonio

Antonio is a high school senior; he works at Dairy Queen as a sales associate, approx. 10 hours per week during the school year and 30 during the summer. He received this W2 from his employer in February and needs to file his taxes for the first time. He heard TurboTax has a 'free' version, he is a bit nervous to file taxes for the first time.



Antonio is 18 and lives at home, his parents claim him as a dependent. For tax purposes, he is single, and has one job. Antonio's birthdate is July 21, 2002.

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

a Employee's social security number <b>013-28-2019</b>		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) <b>52-2972543</b>			1 Wages, tips, other compensation <b>9440.08</b>		2 Federal income tax withheld <b>564.01</b>					
c Employer's name, address, and ZIP code  <b>Dairy Queen, International 1640 Camino Del Rio San Diego, CA 92108</b>			3 Social security wages <b>9440.08</b>		4 Social security tax withheld <b>585.28</b>					
			5 Medicare wages and tips <b>9440.08</b>		6 Medicare tax withheld <b>136.88</b>					
			7 Social security tips		8 Allocated tips					
			9		10 Dependent care benefits					
d Control number			11 Nonqualified plans		12a See instructions for box 12					
e Employee's first name and initial Last name Suff.  <b>Antonio Davis 3902 Georgia St San Diego, CA 92116</b>			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			15 State Employer's state ID number <b>CA 421502878</b>		16 State wages, tips, etc. <b>9440.08</b>		17 State income tax <b>597.00</b>		18 Local wages, tips, etc.	

Form **W-2** Wage and Tax Statement **2019** Department of the Treasury

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

WE RECOMMEND

**Free Edition**

Simple tax returns

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**\$0 Fed. \$0 State. \$0 File.**

File for \$0

There is no other information about Antonio that you need to file his taxes.

However; at times you may be asked questions by TurboTax such as "Did Antonio serve in the National Guard" or "Is Antonio legally Blind". Answer "no" to questions like these.