



Intuit Education: Curriculum Orientation

- > Checklist
- > Connecting to Mint
- > Intro to Mint Activity

Checklist



Complete the following before using Mint:



Create an account to log in (and out) of Mint successfully.

Follow the directions on page 1 of the Connecting to Mint Guide.

This is how you will log in to gain access to Mint.



Connect to the Bank of Intuit.

Follow the directions on page 2 of the Connecting to Mint Guide to connect to the Bank of Intuit.

This will import data from a *fictional* accounts including checking, savings, credit card, and loans. This step is crucial before starting activities.



Connect to credit score.

Follow the directions on page 3 of the Connecting to Mint Guide to connect to TransUnion's credit score.

This will import a *fictional* credit score and report and is also crucial before starting activities.



Complete the "Intro to Mint" activity.

After gaining access to Mint through the above steps, open and complete the Intro to Mint Activity on your own.

This activity serves as an orientation to Mint and an introduction to the fictional persona Isaiah. It is recommended that you also do this activity before any other of the content-specific Mint activities



Come back into Mint on a subsequent day.

Log out of Mint and re-access Mint in a couple of days.

These Mint activities and the fictional persona Isaiah simulate an authentic Mint experience as the account balances, budgets, and trends change daily. You will see new financial data automatically updated daily.

Connecting to Mint



The following steps will allow you to connect to Mint as Isaiah. This setup should take only 5-10 minutes and you will only do this series of steps the first time you log on to Mint.

Things to note:

- When you access Mint for this simulation, you will be accessing a scenario for a fictional user - Isaiah and his financial profile.
- Do **not** use any personal information when signing up, including your real email, phone number, or other info.
- When you log out or end your session, **you MUST use the same device for future logins**. If you use a different device, you'll have to create a new account.

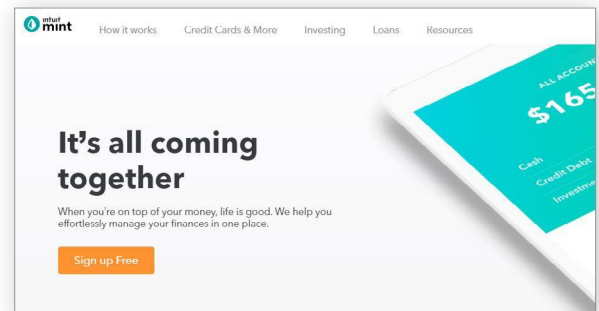
Part 1 is to sign in to Mint and connect to Isaiah's financial accounts

Part 2 is to connect to Isaiah's credit history.

Part 1

1. Go to **Mint.com** and sign up for free.

The device that you are using is the only one that can re-access Mint without going through these steps again.



2. Create an account.

Make up an email address that ends in **@intuiteducation.com**.

Do not use a real or personal email address.

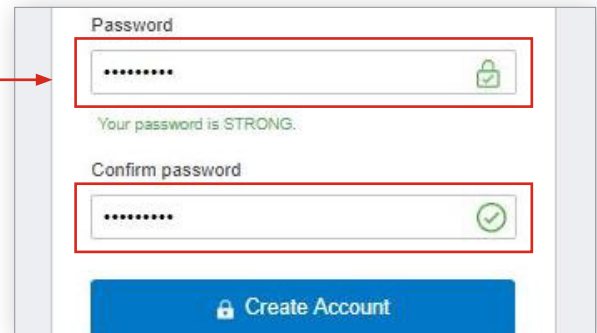
Ignore the prompt to enter a phone number. It is not necessary to log in.

Do not use a personal phone number.

2. (continued)

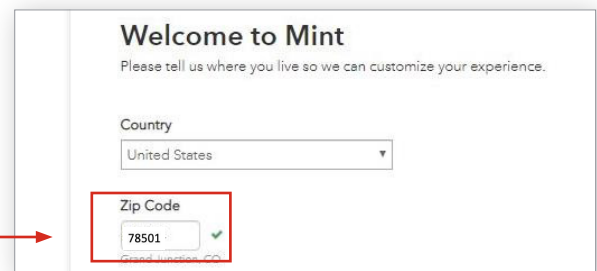
Use the suggested password **Mint1234!**
Record the email and password you used.

Click to create an account.



3. Welcome to Mint.

Enter **78501** for zip code.

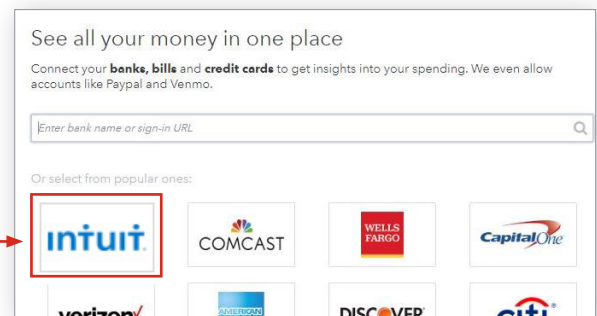


4. Connect to Bank of Intuit.

This is the screen to connect to the bank
account for our fictional persona **Isaiah**.

Search for **Bank of Intuit**.

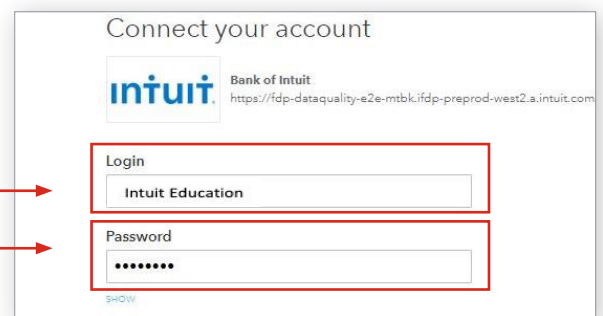
More than one may appear,
choose the one with the blue Intuit logo.



Use the following:

Login: Intuit Education

Password: Mint1234!



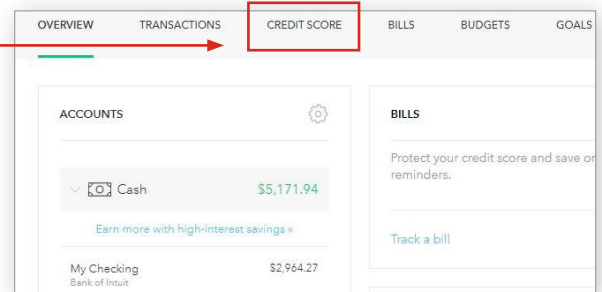
Success! You are now connected to Mint.
Go to Account Overview.

Part 2

After connecting to Bank of Intuit, you are now at the **Overview** tab. From here you can see some of the financial information for our fictional user Isaiah.

5. Connect to **Credit Score**.

Click on the **Credit Score** tab.
It is the 3rd from the left.

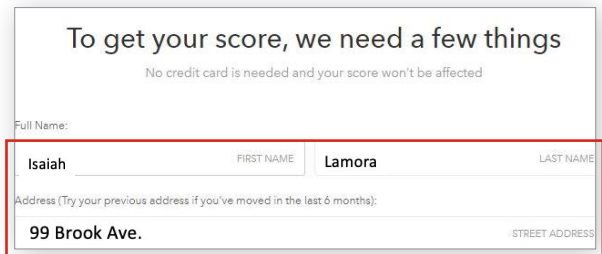


Click to get Isaiah's credit score.

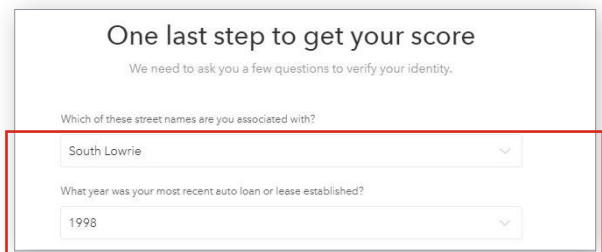


6. Enter Isaiah's information:

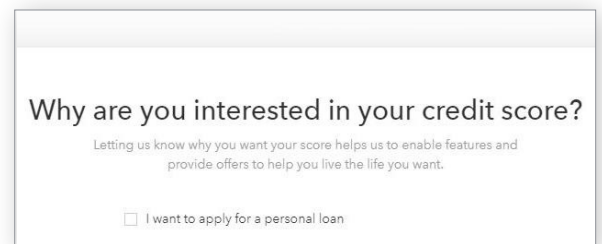
Name: Isaiah Lamora
Address: 99 Brook Ave.
McAllen, TX 78501
DOB: January 1, 1996
Soc Sec: 999-11-1996

A screenshot of the credit score setup form. The title is 'To get your score, we need a few things'. Below it, it says 'No credit card is needed and your score won't be affected'. The form has two sections: 'Full Name:' with fields for 'FIRST NAME' (Isaiah) and 'LAST NAME' (Lamora), and 'Address (Try your previous address if you've moved in the last 6 months):' with a field for 'STREET ADDRESS' (99 Brook Ave.).

7. Verification questions.
Select the **first** answer from each of the drop downs to verify.

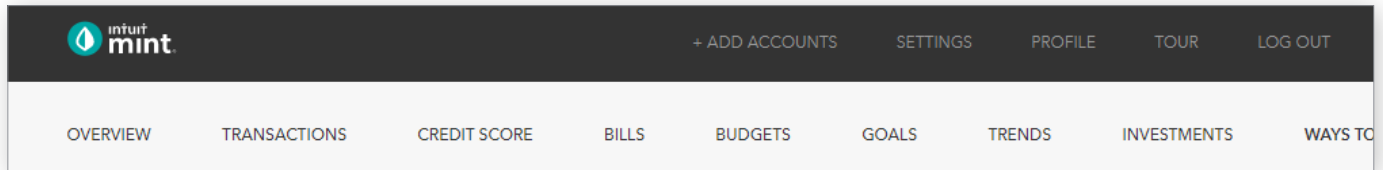
A screenshot of the verification questions screen. The title is 'One last step to get your score'. Below it, it says 'We need to ask you a few questions to verify your identity.' There are two questions: 'Which of these street names are you associated with?' with a dropdown menu showing 'South Lowrie', and 'What year was your most recent auto loan or lease established?' with a dropdown menu showing '1998'.

On the next screen when asked interest in credit score, click on any box(es).

A screenshot of the interest in credit score screen. The title is 'Why are you interested in your credit score?'. Below it, it says 'Letting us know why you want your score helps us to enable features and provide offers to help you live the life you want.' There is a checkbox labeled 'I want to apply for a personal loan'.

Success! You are connected to Isaiah's credit score.
Return to the Mint overview tab.

Intro to Mint Student Worksheet

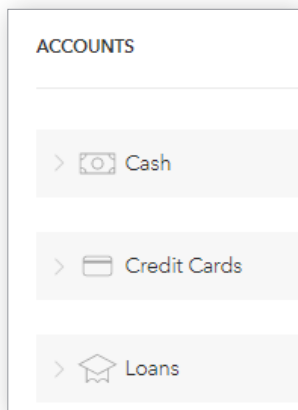


Part 1: Overview Tab

You should be at the Mint **Overview** tab. If not, click on overview from the menu at the top of the page.

Mint imports transactions from Isaiah's financial accounts. On the left side of the page, you can see the accounts and balances.

1. Record each account name and balance:



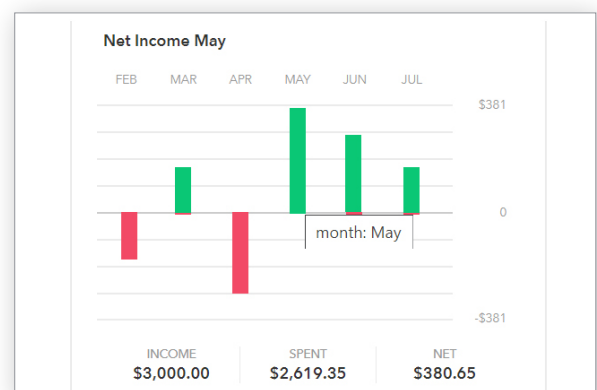
ACCOUNT	ACCOUNT NAME	BALANCE
Cash		\$
Cash		\$
Credit Card		\$
Loan		\$
Loan		\$

Note: Clicking on the gray arrows will expand or collapse accounts

Scrolling down on the **Overview** tab, on the left side is a graph that shows net income by month.

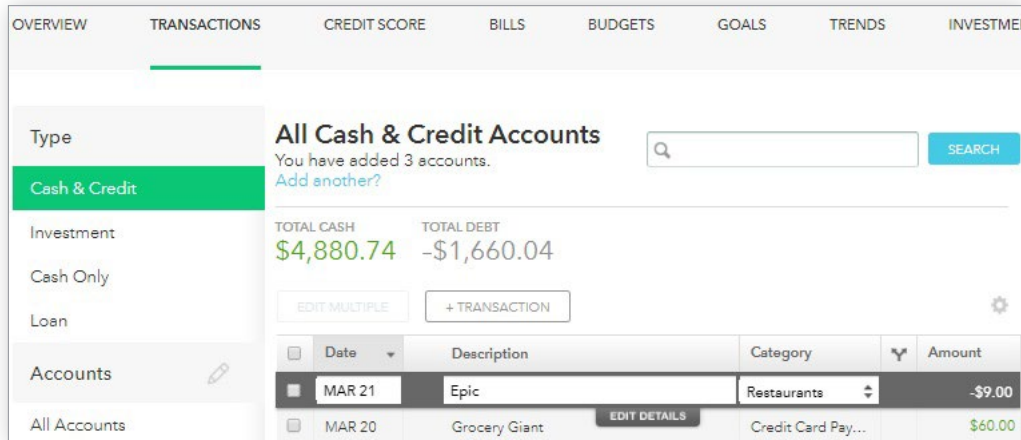
A green bar indicates more income than spending; a red bar more spending than income.

2. How much has Isaiah spent so far this month?
How does it compare to last month?



Part 2: Transactions Tab

Click on the **Transactions** tab. Here we see all Isaiah's spending, all sorted by date.



3. List Isaiah's three most recent transactions:

DATE	DESCRIPTION	CATEGORY	AMOUNT
			\$
			\$
			\$

On the left side, we can choose to see transactions for any individual account instead of all accounts:

4. Click on Isaiah's **My Savings** account.
 How much does Isaiah transfer to his savings each month?
 How much did Isaiah earn in interest last month?

5. Click on Isaiah's **My Credit Card** account.
 Where are some frequently occurring places Isaiah uses his credit card for purchases?
 When did Isaiah last make a credit card payment? How much was the payment?

Part 3: Credit Score

At the **Credit Score** tab, we can learn about Isaiah's credit rating. If you do not see a score, see directions in the Connecting to Mint Guide.

6. What is Isaiah's credit score and ranking?

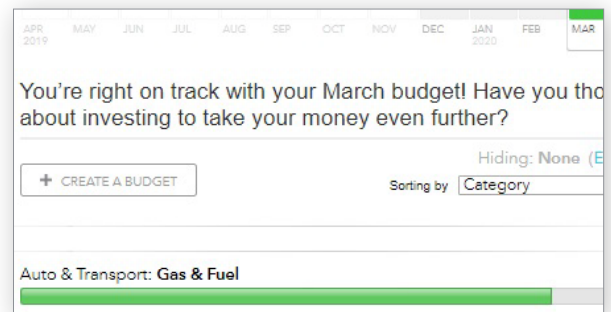
☐ Poor
 ☐ Fair
 ☐ Good
 ☐ Very Good
 ☐ Excellent

Part 4: Budgets

This tool is an interactive section of Mint where users can set up spending categories and set limits for themselves.

By default, a couple budget categories are set up with sample limits. For example, **Auto & Transport: Gas & Fuel**.

7. Analyze the **Auto & Transport** budget.
- What is the current suggested budget limit?
 - How much has Isaiah spent so far this month?



Click on the heading or magnifying glass icon to view transactions for **Gas & Fuel**.

8. Click to view the transactions.
- Describe the transactions for **Auto & Transport**.
 - Where and how much are some of the transactions?



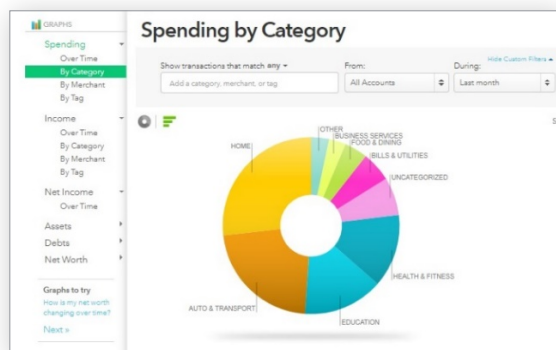
To interact with this budget, click to change the budget limit. The color may be green (Isaiah is within his budget), yellow (approaching limit), or red (over limit).

9. Click to change the budget limit to see how the color change.



☐ Check complete

Part 5: Trends

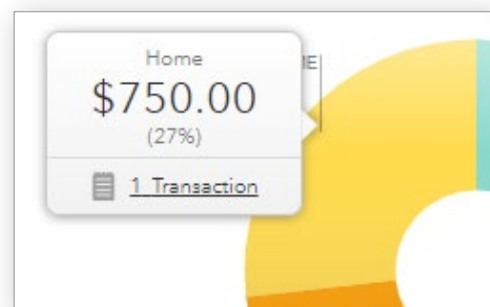


In this tab, we see charts that illustrate Isaiah's spending and income over time.

There are many types of charts listed on the left side of the page.

On the left side, click on **Spending**, and then choose **By Category**. Above the pie chart, make sure to select **Last Month**.

List the five biggest categories of Isaiah's spending.



Hover over any piece of the pie to see the amount and percent that will appear in a pop-up box. Add the amount and percent to the above category list.

In addition to seeing the amount and percent, a link appears in a pop-up box. It links to the transactions that make up spending for that category.

11. Click to see the transactions for Home. What is/are the transactions?

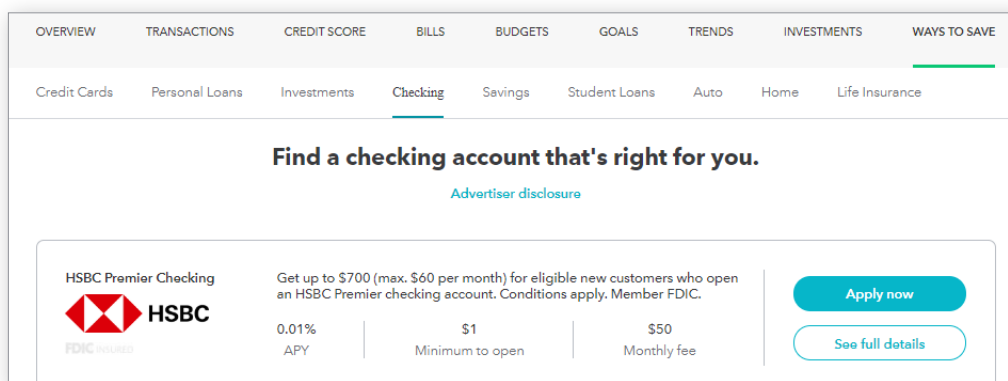
Change the chart type to **Income**, then **Over Time**. Above the chart, select **Last 3 Months**. Here we see how much Isaiah is earning each month from his jobs.

12. How much does Isaiah earn each month?
Is it the same every month?



Part 6: Ways to Save

Mint's **Ways to Save** tab shows offers from current banks for savings, loans, credit, and more. While Isaiah already has a **Savings** account, he can investigate other bank offers. He may find one that offers better terms.



Click to look at the **Checking** account offers.

13. Choose any one of the offers. Record:

BANK NAME	ACCOUNT NAME	APY	MINIMUM NEEDED	MONTHLY FEE
		%	\$	\$

Part 7: Conclusion

People manage their money and budget in different ways. Mint is one of those ways.

14. From the parts of Mint that you've seen, what are two features that make it a useful tool to manage money?

Supplemental Screenshots

The following screenshots should guide students through Mint:

1. Students log in but will not have to provide any personal information.
2. **Mint's** dashboard and landing page immediately shows financial information. Running across the top of the screen are the various tabs.
3. On the left side of the **Overview** tab, Isaiah's accounts appear.
4. In the **Transactions** tab all the individual transactions for Isaiah are in order by date and can be seen entirely or by account.
5. The **Credit Score** tab shows Isaiah's credit score.
6. The **Budgets** tab is also interactive. Mint does a basic set-up of a budget for Mint users.
7. The **Trends** tab shows historical income and spending.
8. Finally, the **Ways to Save** tab shows offers from banks and other institutions.

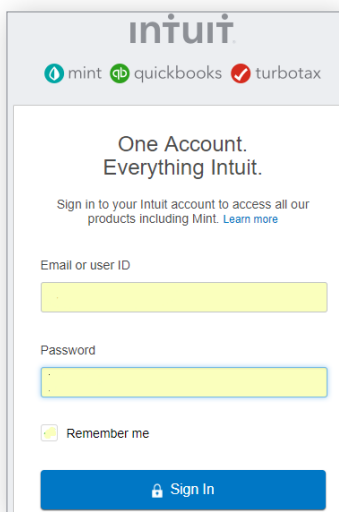


Figure 1: Mint Log In Screen
Log in to Mint using the same device every time.

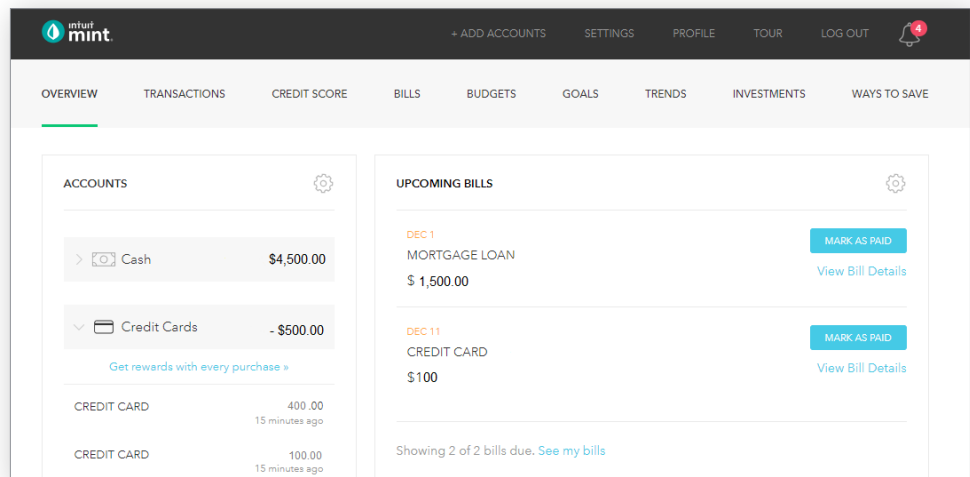


Figure 2: Mint Dashboard
Close any pop-up ads that appear.

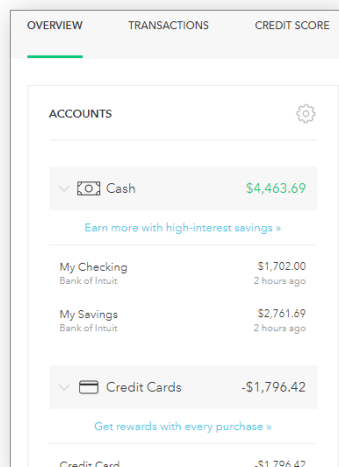
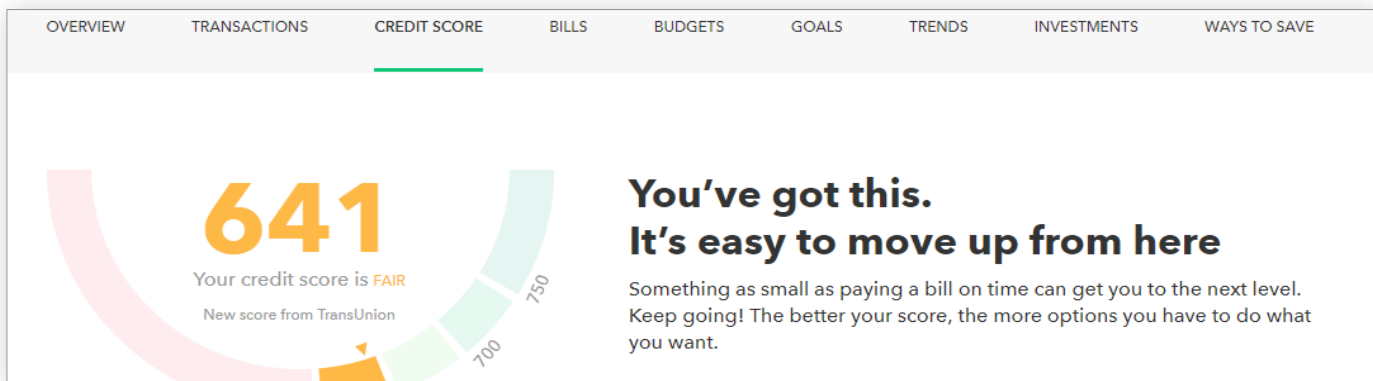
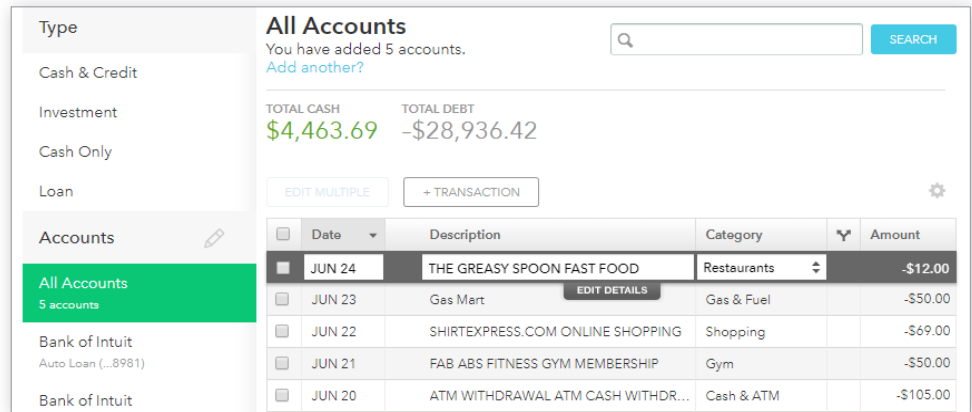


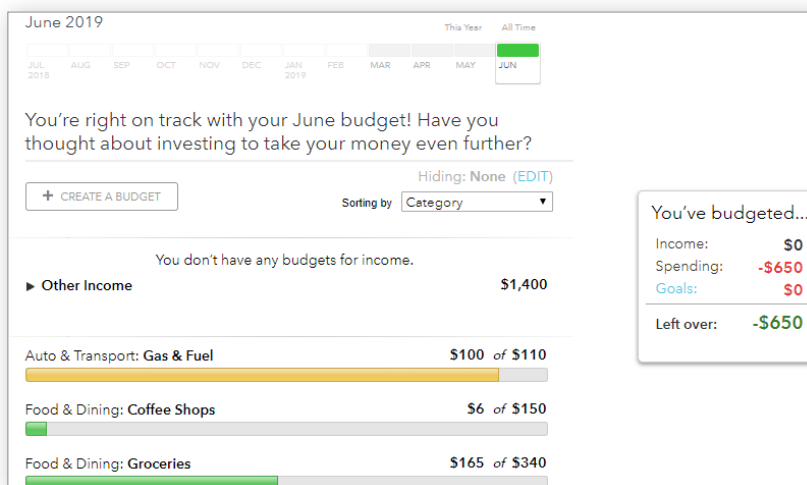
Figure 3: Isaiah's accounts appear in a vertical bar on the left side of the screen. Click on any one to see transactions for that account.

Figure 4: Transactions

Click on All Accounts to see all Isaiah's transactions. Or, choose one account such as Auto Loans, to see transactions for that specific account

**Figure 5: Credit Score**

This is the 3rd tab from the left on Mint's dashboard.

**Figure 6: Budgets**

In Mint, the budgets are set up for a couple categories.

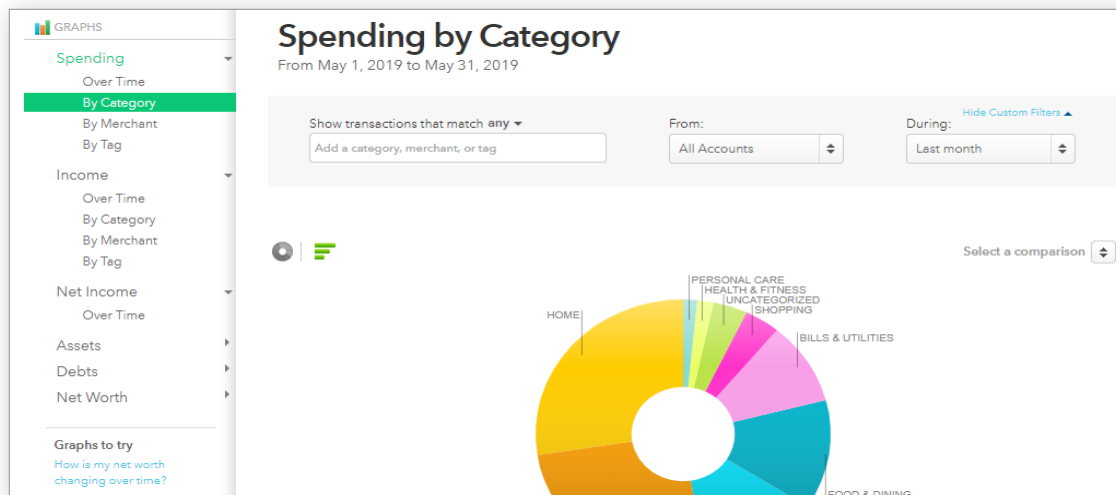


Figure 7: Trends

The right side of the screen in Trends allows the user to choose from a list of graphs by major heading (Spending) and as minor heading (By Category). In addition, a time range can be selected from the drop-down menus above the graph itself.

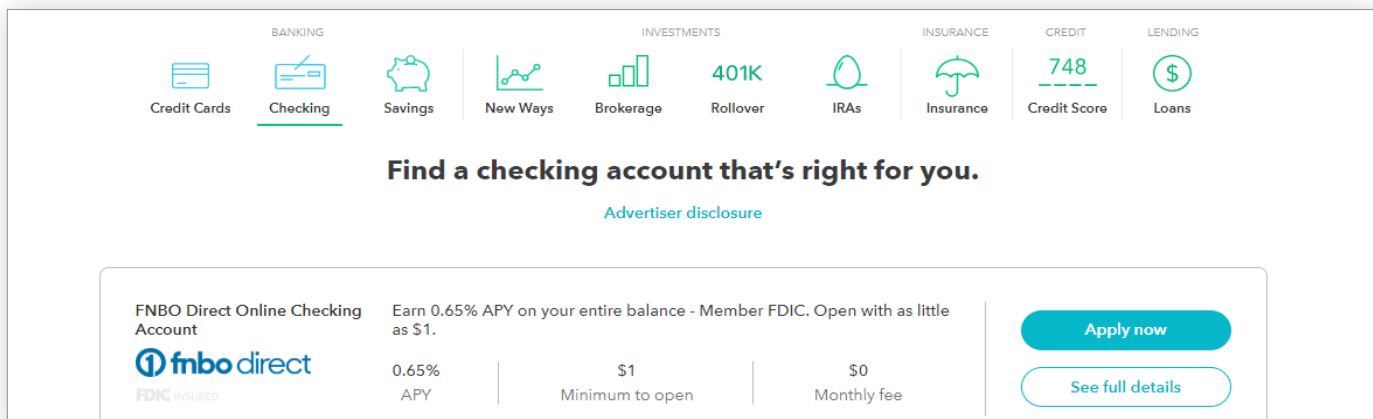


Figure 8: Ways to Save

Mint has a list of ways to save running across the top of the tab. Click on checking, for example, will bring up a list of current checking account offers and details of the account.