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Financial Education for a Better Future



intuit  
turbotax®

## STEP-BY-STEP GUIDE TO TURBOTAX

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

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

### PART 1: SIGN IN TO TURBOTAX

Go to TurboTax for Education at:

<https://accounts.intuit.com/turbotaxonline/education>

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

**@intuiteducation.com**

Example: *ThisIsMyEmail@intuiteducation.com*

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

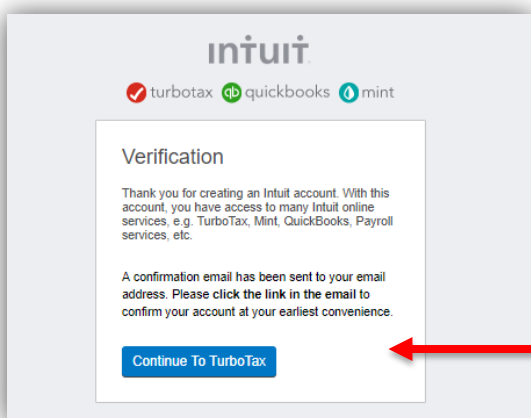
Your User ID matches your email address

**Add the phone number: 555-555-5555**

**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  
StudentName@intuiteducation.com ✓

Confirm email  
StudentName@intuiteducation.com ✓

User ID  
ThisIsMyEmail ✓

Phone (recommended)  
(555) 555-5555  
Standard call, messaging or data rates may apply.  
☐ Verify with text message (most secure)

Password  
.....  
Your password is STRONG.  
Confirm password  
..... ✓

Create Account

On the next screen, ignore the verification prompt and click **"Continue To TurboTax"**

## PART 2: DOING YOUR TAXES

Tell us about you - we'll recommend the right tax solution

America's #1 brand of tax software

Free Edition	Deluxe <small>MOST POPULAR</small>	Premier	Self-E
Simple tax returns	Maximize tax deductions and credits	Investments and rental property	Personal & expenses
\$0 Fed. \$0 State. \$0 File.	\$59.99* <small>State additional</small>	\$79.99* <small>State additional</small>	\$119.99* <small>State additional</small>
<b>File for \$0</b>	<b>Start for Free</b> <small>Pay only when you file</small>	<b>Start for Free</b> <small>Pay only when you file</small>	<b>Start for Free</b> <small>Pay only when you file</small>
★★★★★ <small>(4.99/5   137924 reviews)</small>	★★★★★ <small>(4.41/5   102738 reviews)</small>	★★★★★ <small>(4.47/5   15405 reviews)</small>	★★★★★ <small>(4.47/5   15405 reviews)</small>

There are many steps and pages to completing taxes.

On the first screen, select that you have a job with a W-2.

Then scroll down and choose Free Edition: **"File for \$0"**

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

1. On every screen, you'll have to click or enter information in order to continue.
2. You will be asked many questions.

The answers provided on the W-2 provide many answers, such as Soc Sec number and occupation.

You might be asked a question for which you aren't sure of an answer. *See the following page for answers to confusing questions*

3. There are about 20 screens to click through before getting to the section to enter W-2 financial information.
4. This TurboTax for Education requires users to manually type in tax information and W-2s because it is all fictional. TurboTax may ask to auto-import, but you cannot do that.

How are you feeling about doing your taxes?

Good

Not so good

Don't ask

**Continue**

Date of birth

mm/dd/yyyy

Social Security number [Learn more](#)

xxx-xx-xxxx

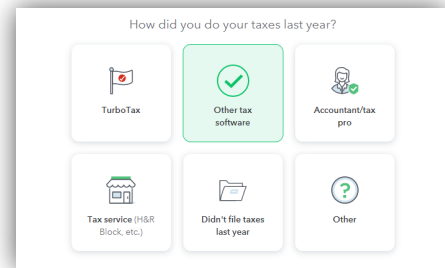
Occupation [Learn more](#)

Example: student, retired, engineer

**Continue**

**Skip Import**

## THINGS TO KNOW DURING THE PROCESS



**Last year:** You used “other tax software”

**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.

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

### Miscellaneous information:

- 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
- You had health coverage all year, **not** with a gov. assisted program
- You did/do NOT:
  - o Make money in another state
  - o Have dependents
  - o Receive retirement income, income from gambling, or other.

**EINs:** Your employer EINs are on the W-2 scenario worksheet.

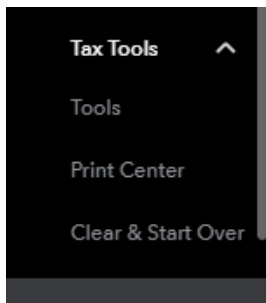
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When you get to the following screen, you are ready to finish (see Part 3)

A screenshot of the TurboTax "Here's your W-2 info" screen. At the top, it shows a "FEDERAL REFUND (in progress)" of \$874. The screen has four tabs: "Wages & Income" (selected), "Deductions & Credits", "Other Tax Situations", and "Federal Review". Below the tabs, there's a heading "Here's your W-2 info" and a subtext: "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." Below this is a table with three columns: "Employer's name", "Box 1 Wages, tips, other", and "Box 2 Federal income tax withheld". The table has one entry for "Tektronix" with wages of \$11,500.00 and tax withheld of \$874.00. There is an "Edit" button and a trash icon next to this entry. At the bottom of the table is a "Total" row with wages of \$11,500.00 and tax withheld of \$874.00. Below the table is a button that says "Add another W-2".

## PART 3: COMPLETE AND PRINT

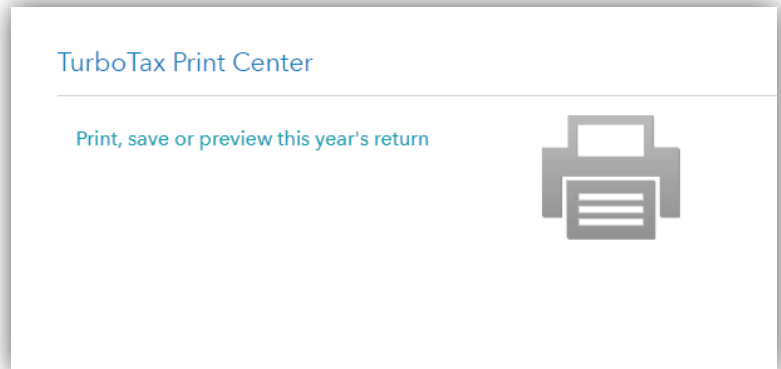
After getting to the W-2 summary screen, you are ready to download or print your taxes.



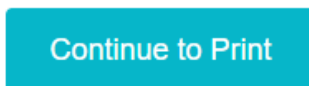
Click **"Tax Tools"** on the left side of the screen and click on **"Print Center"**

Click to print this year's tax return.

Click **continue**



Select **"Use my info"** to download your W-2s and click **"Continue to Print"**

A screenshot of a registration form titled 'To file, please enter your registration'. It has a white background. At the top, there is a checkbox labeled 'Use my info from my tax return' which is checked. Below this, there are two input fields: 'First name' with the value 'Jamie' and 'Last name' with the value 'Sommers'. Below these is an 'Address' field which is partially visible.A screenshot of the TurboTax Print Center selection screen. It has a white background. At the top, it says 'TurboTax Print Center'. Below that, it says 'Let us know what you'd like to print or download.' There is a checkbox labeled '2019 Federal returns' which is checked. Below this, it says 'Select which forms you'd like to print or download (applies to any return selected above).' There are three radio button options: 'Just my tax return(s)' (selected), 'Include government worksheets (optional)', and 'Include government and TurboTax worksheets (optional)'. At the bottom, there is a blue button labeled 'View or print forms'. A red arrow points from the '2019 Federal returns' checkbox to the right.

Choose **Federal** 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!**