



TEACHER CHECKLIST

OVERVIEW FOR TEACHING TURBOTAX

CONNECT TO TURBOTAX THROUGH THE EDUCATIONAL LINK.

Action step:

Follow the directions on Page 1 of the How-To Guide.
You will be accessing an educational version of TurboTax,
<https://accounts.intuit.com/turbotaxonline/education>
This is different than the official TurboTax site.

CREATE AN ACCOUNT.

Action step:

Follow the directions on Page 1 of the How-To Guide
Create a fictional email address that ends in “@intuiteducation.com”
Note: *You cannot re-access TurboTax’s educational site even with the username and password that you created. Plan to complete the tax filing process in one session.*

CHOOSE A PROFILE AND W-2

Action step:

There are several different W-2 personas from which to choose for this activity. All will give students a similar experience in filing taxes, but there are variations in income, age, etc. Select one that suits you.

CONTINUE FILING TAXES FOR THE SELECTED PERSONA

Action step:

Follow the directions on Page 2 and 3 of the How-To Guide.
Navigate through TurboTax, enter information as prompted.
Manually enter the W-2 (do not select auto-import, it will not work).

COMPLETE AND PRINT

Action step:

When you get to the W-2 summary screen (*shown on Part 3 of the How-to 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.