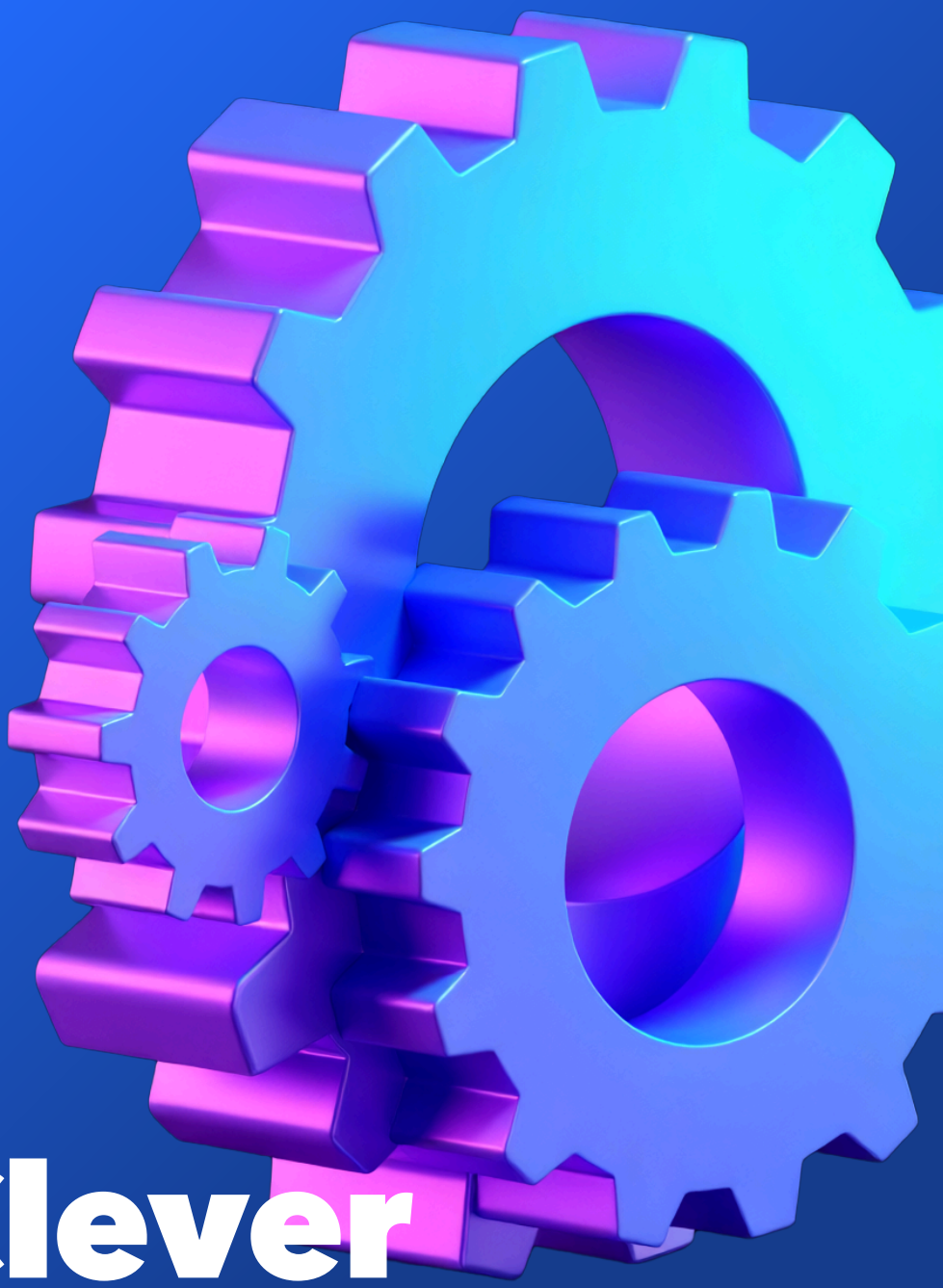
INTUIT
for Education



Your Clever Integration Guide

Intuit for Education has partnered with Clever for SSO, Rostering, and Assignments making it even easier to bring real-world financial literacy lessons into every classroom. This integration meets administrative security standards and was built for a smooth setup every step of the way.

This guide will walk you through each step of the setup process – from connection to classroom – with clear visuals and support on how Intuit for Education fits seamlessly within your Clever dashboard. Empowering educators to focus on what matters most.

Let's get started – your path from setup to success begins below.

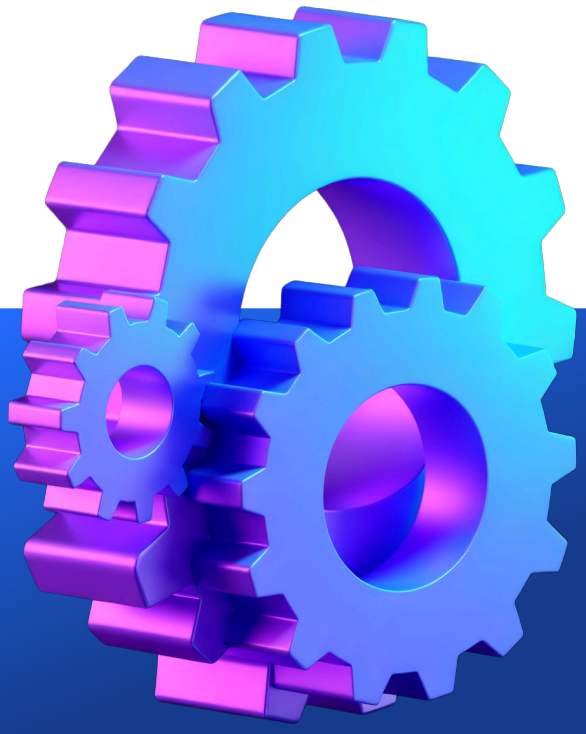
Need help? Our team is always here at education@intuit.com.

Our Mission

Intuit for Education provides free financial education with engaging, real-world tools designed to connect with the next generation. Our goal is to help 50 million students become financially literate, capable, and confident by 2030. Together, we can get there.

Who We Are

Intuit for Education is a free learning platform that empowers teachers to bring financial and entrepreneurial learning into the classroom through tools like QuickBooks, Credit Karma, and TurboTax simulations. We partner with educators and districts to make financial literacy engaging, relevant, and actionable – helping students gain the confidence to take control of their financial future.



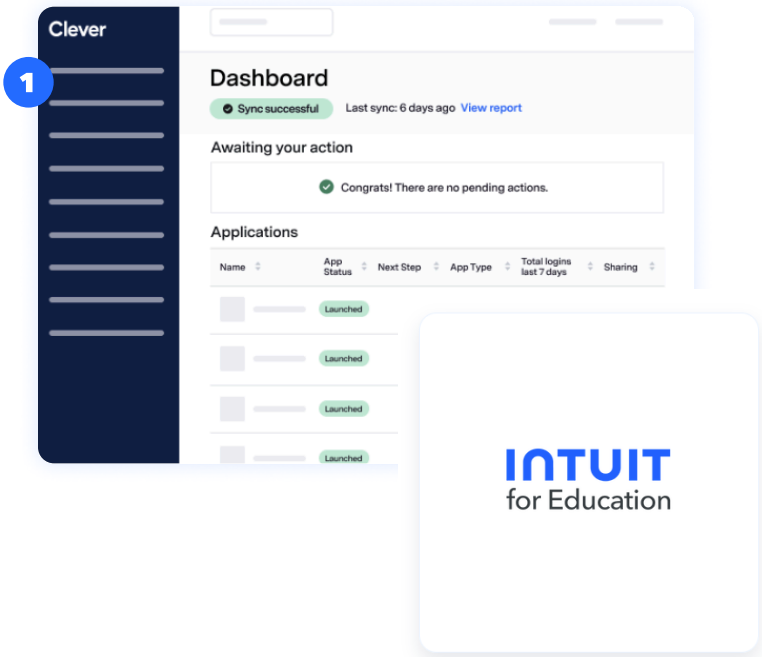
Getting Started: Clever Admin Experience

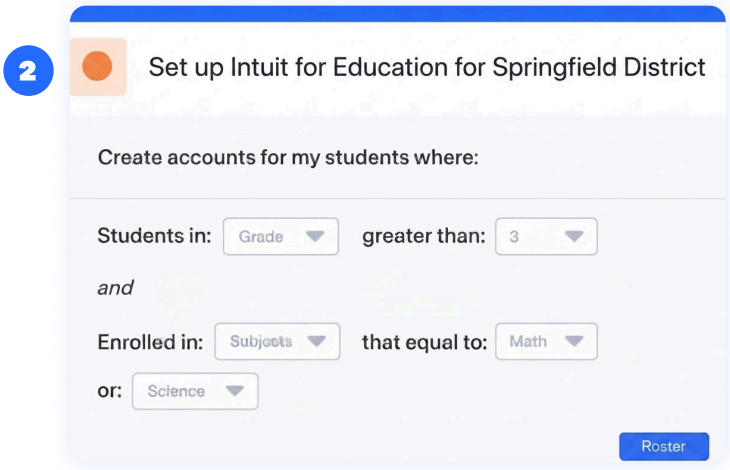
Setup is a few easy steps, primarily consisting of adding the Intuit for Education application and setting sharing permissions in your Clever Dashboard.

There are two ways to connect applications: **accepting an app invite** or **requesting an app**. You can add Intuit for Education at any time.

Accepting Application Invites:

1. Go to your Clever Dashboard and check for a pending application invite.
2. Accept the invite from Intuit for Education to begin the rostering setup.
3. Set up your sharing rules to control which data is shared with Intuit for Education.
4. Share the application with the appropriate schools.
5. When your users are ready, make the application visible in the Clever portal. Until then, you can keep it hidden.
6. Notify teachers that they can now access the application through Clever.





Requesting the Intuit for Education App through Clever

No invite? No problem. Clever Admins can request to connect with Intuit for Education directly.

1. Search for "Intuit for Education" in the "**Add Applications**" section of your Clever Dashboard.
2. **Configure user access.** These sharing permissions control what data Intuit for Education will have access to when creating accounts for your users. Additionally, it will determine which users will be able to see Intuit for Education in the Clever Portal.
3. **Inform and train teachers.** It is important that teachers know how they and their students will access and use Intuit for Education in their classroom.

Tips & Tricks for Managing Data in Clever

- Add co-teachers in Clever
- Create custom sections
- Create custom teachers or staff
- Syncing custom fields
- Sharing demographic fields with apps

Troubleshooting

The source of truth for all data in Intuit for Education is your SIS and then Clever. As such, it data is incorrect in Intuit for Education, the issue will likely need to be resolved in your SIS or with the help of Clever.

Data incorrect in Clever?

Most common solutions:

- Fix data in SIS
- Review Clever troubleshooting documentation
- Contact Clever Support

Data incorrect in Intuit for Education?

Follow these steps:

- Confirm data is correct in your SIS
- Confirm data is correct in Clever
- Confirm record is shared with Intuit for Education
- Wait 24 hrs – data is synced by Intuit for Education once per day
- Contact Intuit for Education Support

User Access

If a user does not see the Intuit for Education icon in the Clever Portal, it is likely because they are not shared with our application. Clever has a tool called "Troubleshoot Sharing" that can be used to help identify why the user is not shared. More details on this tool can be found in Clever's help center.

Logins to Intuit for Education

If a user encounters a problem after clicking on the Intuit for Education icon in the Clever Portal, please reach out to our team. If the user has been shared for more than 24 hrs, the issue will need to be investigated and resolved by our team.

FAQs

Find quick answers to common questions on integrating and using Intuit for Education with Clever.

1. How does Intuit for Education work with Clever?
Intuit for Education integrates with Clever for single sign-on and secure rostering. Once a district adds Intuit for Education in Clever, teachers and students open it from the Clever Portal, and classes roster through Secure Sync.

2. Do students need new accounts or passwords with Clever?
No, not at all. With Clever, you can share coursework and activity links or a class code, so students can join without creating an account.

3. Do educators still need to create a class if we use Clever?
No. With Clever's rostering, classes and rosters are created for you and stay current through Secure Sync. If you want to make new classes, make them in your existing rostering tools instead. They'll come through Clever along with the rest of your classes.

4. What data is shared through Clever, and is it secure?
Your district stays in control of its data. Clever shares only what Intuit for Education needs, and the integration complies with FERPA and COPPA. For more information, visit: https://www.clever.com/trust/privacy