Ask anyone to tell you about an experience they had with taxes and the IRS.

There's a reason tax-prep tools are turning those tax filing experiences into positive ones.

THE CHALLENGE

How can the IRS leverage its incredible data collection to make taxpayer data <u>helpful</u>, and create a better user <u>experience</u> for people to make informed financial decisions <u>BETWEEN</u> their tax filings.

TAXPAYERS NEED A SERVICE THAT IS...

Actionable

To be helpful, the service must offer dynamic actions a person can take to accomplish goals in addition to analyzing and browsing their data.

Comprehensible

Prioritized and organized data needs to provide context that is clear to understand.
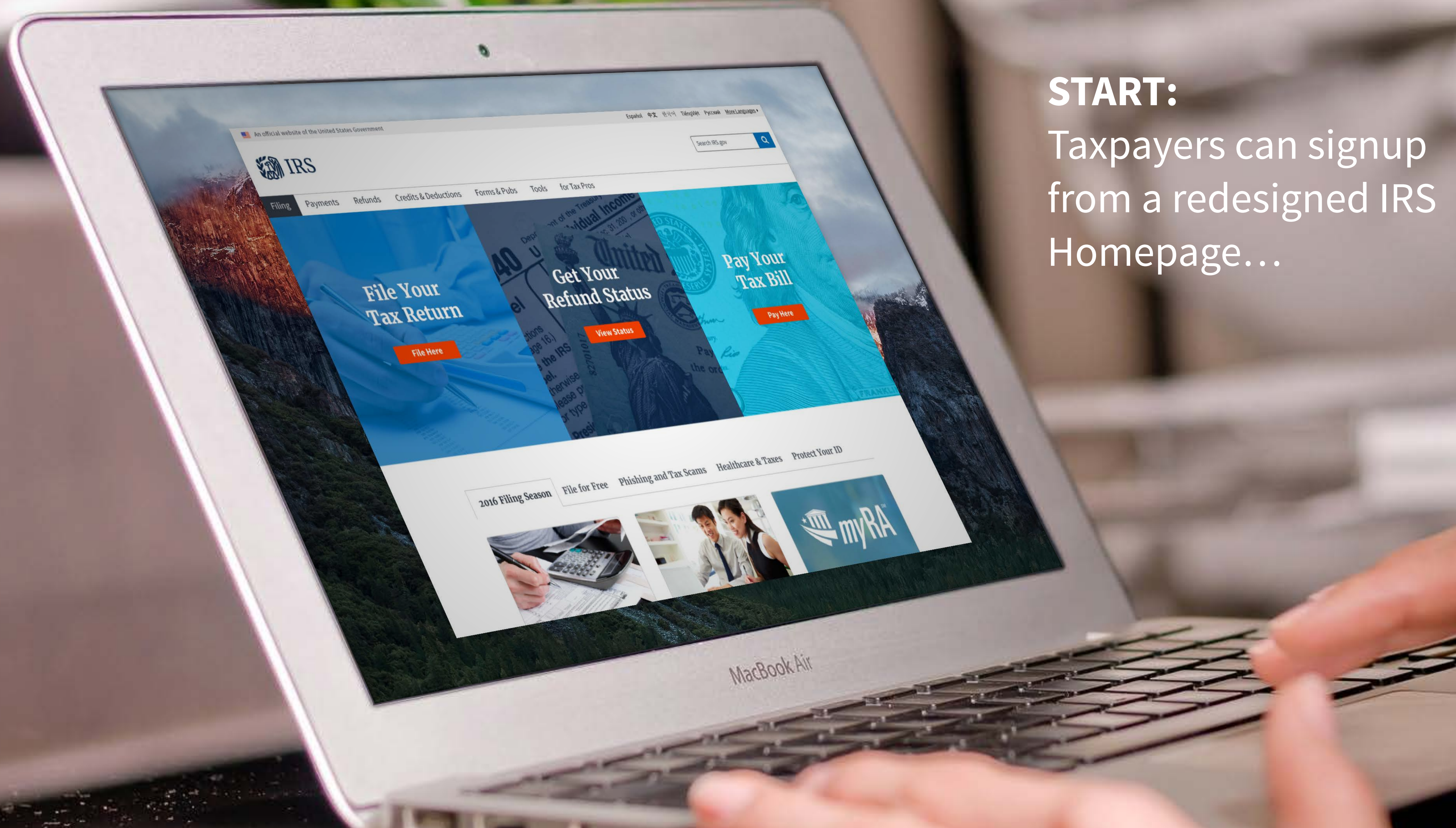
Humble

This service is never intended to be used day-to-day. It should be a helpful tool that can be easily learned and boasts a recognizable interface for a wide audience

Accessible

Make the most important tools and notifications accessible to those who might not have access to internet services, or trouble connecting.
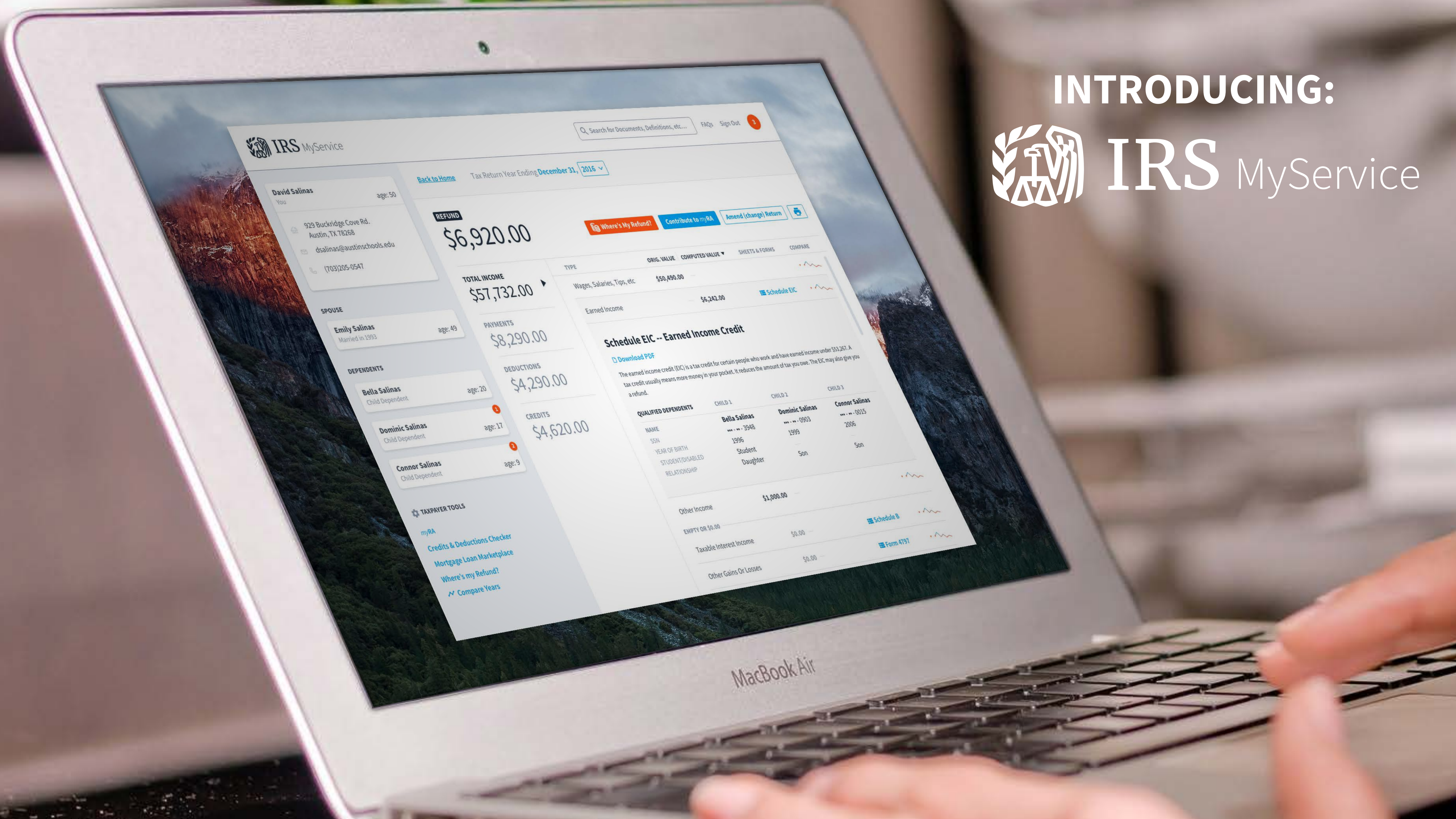
START:
Taxpayers can signup from a redesigned IRS Homepage…

DASHBOARD (HOME)

Profile Sidebar

You and your family are constant variables that don't often change. Update you family's information that can be used to get started on next year's taxes. This includes automatically calculating if you and/or your dependents qualify for credits and deductions.

Individual-based Notifications ❶

Profile information such as ages of children can ping automatic notifications that can be used to trigger reminders and calls to action.

Dominic Salinas
Child Dependent   age: 17

● Is **Dominic** ready for college? Get help paying for it.

Start a New FAFSA

Tax Return Cards

Yearly snapshots provide simple insights to compare data year-to-year before jumping into individual years. Clicking the card takes users into the Individual Return View.

Tax Return Card (Back)

Clicking ▢ More shows a few more quick actions a user can take.

IRS MyService

🔍 Search for Documents, Definitions, etc...   FAQs   Sign Out   **3**

David Salinas
You   age: 50

🏠 929 Buckridge Cove Rd.
   Austin, TX 78268

✉ dsalinas@austinschools.edu

☎ (703)205-0547

SPOUSE

Emily Salinas
Married in 1993   age: 49

DEPENDENTS

Bella Salinas
Child Dependent   age: 20

Dominic Salinas   ❶
Child Dependent   age: 17

Connor Salinas   ❷
Child Dependent   age: 9

⚙ **TAXPAYER TOOLS**

*my*RA
Credits & Deductions Checker
Mortgage Loan Marketplace
Where's my Refund?
📈 **Compare Years**

Get Started on 2017

File My Taxes

2016

$6,920.00
REFUND

Accepted on April 4, 2016

Total Income	$51,490.00
Total Payments	$4,620.00
Total Deductions	$7,350.00
Total Credits	$7,350.00

🖨   ▢ More

2015

$210.00
OWED

Payment Recieved on May 24, 2015

Total Income	$72,604.32
Total Payments	$2,400.00
Total Deductions	$8,120.34
Total Credits	$7,350.00

🖨   ▢ More

Year

$3,201.80
REFUND

Accepted on April 4, 2016

Total Income	$51,490.00
Total Payments	$4,620.00
Total Deductions	$7,350.00
Total Credits	$7,350.00

🖨   ▢ More

Year

$490.00
OWED

Accepted on April 4, 2016

Total Income	$51,490.00
Total Payments	$4,620.00
Total Deductions	$7,350.00
Total Credits	$7,350.00

🖨   ▢ More

Year

$1,007.00
REFUND

Accepted on April 4, 2016

Total Income	$51,490.00
Total Payments	$4,620.00
Total Deductions	$7,350.00
Total Credits	$7,350.00

🖨   ▢ More

Year

$720.30
OWED

Year

$2,342.94
REFUND

SOME THINGS YOU CAN DO

🖨 **Print/Download Tax Return**

Amend (Change) Return

Download all Forms and Worksheets

Contribute to myRA

💲 **Where's My Refund?**

▢ Less

TAX RETURN INDIVIDUAL YEAR VIEW

Search for Documents, Definitions, etc...

Back to Home   Tax Return Year Ending **December 31,** 2016

David Salinas
You   age: 50

929 Buckridge Cove Rd.
Austin, TX 78268

dsalinas@austinschools.edu

(703)205-0547

REFUND

$6,920.00

Where's My Refund?   **Contribute to myRA**   **Amend (change) Return**

Important Actions

Front-and-center are actions most important to users.

SPOUSE

Emily Salinas
Married in 1993   age: 49

DEPENDENTS

Bella Salinas
Child Dependent   age: 20

Dominic Salinas   1
Child Dependent   age: 17

Connor Salinas   2
Child Dependent   age: 9

TOTAL INCOME
$57,732.00

PAYMENTS
$8,290.00

DEDUCTIONS
$4,290.00

CREDITS
$4,620.00

TYPE	ORIG. VALUE	COMPUTED VALUE ▼	SHEETS & FORMS	COMPARE
Wages, Salaries, Tips, etc	**$50,490.00**	—		
Earned Income	—	**$6,242.00**	☰ Schedule EIC	
Other Income	**$1,000.00**	—		
EMPTY OR $0.00				
Taxable Interest Income	$0.00	—	☰ Schedule B	
Other Gains Or Losses	$0.00	—	☰ Form 4797	
Capital Gain Or Loss	$0.00	$0.00	☰ Schedule D	
Business Income Or Loss	$0.00	$0.00	☰ Schedule C	
Alimony Received	$0.00			
Total Social Security Benefits	$0.00	—		
Qualified Dividends	$0.00	—		
Ordinary Dividend Income	$0.00	—	☰ Schedule B	
Tax-Exempt Interest	$0.00	—		

Organize and sort data

Data fields can be sorted. Sorting by descending value is shown here. This is useful for separating out empty fields

Sibling Service Quicklinks

Links to services that can be combined with IRS MyService using your profile information.

⚙ TAXPAYER TOOLS

myRA

Credits & Deductions Checker

Mortgage Loan Marketplace

Where's my Refund?

〰 Compare Years

Compare to other years

Each field is accompanied by a snapshot histogram illustrating the simple trend which can be **expanded** to view details and explore the data.

IRS MyService

Search for Documents, Definitions, etc...

FAQs Sign Out 3

Back to Home Tax Return Year Ending **December 31,** 2016

David Salinas
You   age: 50

929 Buckridge Cove Rd.
Austin, TX 78268

dsalinas@austinschools.edu

(703)205-0547

REFUND

$6,920.00

Where's My Refund? Contribute to *my*RA Amend (change) Return

SPOUSE

Emily Salinas
Married in 1993   age: 49

TOTAL INCOME
$57,732.00

PAYMENTS
$8,290.00

DEDUCTIONS
$4,290.00

CREDITS
$4,620.00

DEPENDENTS

Bella Salinas
Child Dependent   age: 20

Dominic Salinas   1
Child Dependent   age: 17

Connor Salinas   2
Child Dependent   age: 9

TYPE	ORIG. VALUE	COMPUTED VALUE ▼	SHEETS & FORMS	COMPARE
Wages, Salaries, Tips, etc	$50,490.00	—		
Earned Income	—	$6,242.00	Schedule EIC	

Schedule EIC -- Earned Income Credit

📄 Download PDF

The earned income credit (EIC) is a tax credit for certain people who work and have earned income under $53,267. A tax credit usually means more money in your pocket. It reduces the amount of tax you owe. The EIC may also give you a refund.

QUALIFIED DEPENDENTS	CHILD 1	CHILD 2	CHILD 3
NAME	Bella Salinas	Dominic Salinas	Connor Salinas
SSN	••• - •• - 3948	••• - •• - 0903	••• - •• - 0015
YEAR OF BIRTH	1996	1999	2006
STUDENT/DISABLED	Student		
RELATIONSHIP	Daughter	Son	Son

Other Income	$1,000.00	—		

EMPTY OR $0.00

Taxable Interest Income	$0.00	—	Schedule B	
Other Gains Or Losses	$0.00	—	Form 4797	

TAXPAYER TOOLS

*my*RA

Credits & Deductions Checker

Mortgage Loan Marketplace

Where's my Refund?

Compare Years

Supporting documents

If a data field is accompanied with a form or worksheet, view an itemized breakdown by clicking the link.

Schedule EIC

Search for Documents, Definitions, etc...

FAQs Sign Out 3

Tax Return Year Ending **December 31,** 2016

Where's My Refund? Contribute to *my*RA Amend (change) Return

TYPE	ORIG. VALUE	COMPUTED VALUE ▼	SHEETS & FORMS	COMPARE
Wages, Salaries, Tips, etc	$50,490.00			✕ CLOSE

COMPARE YEARS
Wages, Salaries, Tips, etc.

▼ Down **28%** from 2015   ▲ Up **35%** from 2010

25% Tax Rate
$74,901

$76,373.48
📄 W2 (1) $49,200.00
📄 W2 (2) $27,173.48

Inflation from 2010

15% Tax Rate
$18,451

2016 2015 2014 2013 2012 2011 2010

Earned Income	—	$6,242.00	Schedule EIC	
Other Income	$1,000.00	—		

EMPTY OR $0.00

Taxable Interest Income	$0.00	—	Schedule B	
Other Gains Or Losses	$0.00	—	Form 4797	
Capital Gain Or Loss	$0.00 $0.00		Schedule D	

TAXPAYER TOOLS

*my*RA

Credits & Deductions Checker

Mortgage Loan Marketplace

Where's my Refund?

Compare Years

FUNCTIONALITY DETAILS

Contribute to myRA

Specify the amount you wish to contribute from your **2016** refund.

myRA Contribution

$500.00

Direct Deposit

$6,220.00

Submit   Cancel

✕ CLOSE

★ TOP RESULT

What Are Tax Deductions?

A **tax deduction** lowers your taxable income, which therefore low... tax liability. Some people mistakenly think a tax deduction is a dire... reduction of taxes owed. That is actually a tax credit, which does di... reduce the amount of taxes owed instead of simply reducing your ta... income.

Itemized **Deduction**

Standardized **Deduction**

🔍 Search for Documents, Definitions, etc...

Start a New FAFSA

Using your profile and tax information, we will automatically begin a new FAFSA application fill in as many fields as we can for:

Dominic Salinas
Child Dependent   age: 17

When is Dominic attending college?

○ Between July 1, 2016 and June 30, 2017?
✓ Between July 1, 2015 and June 30, 2016?
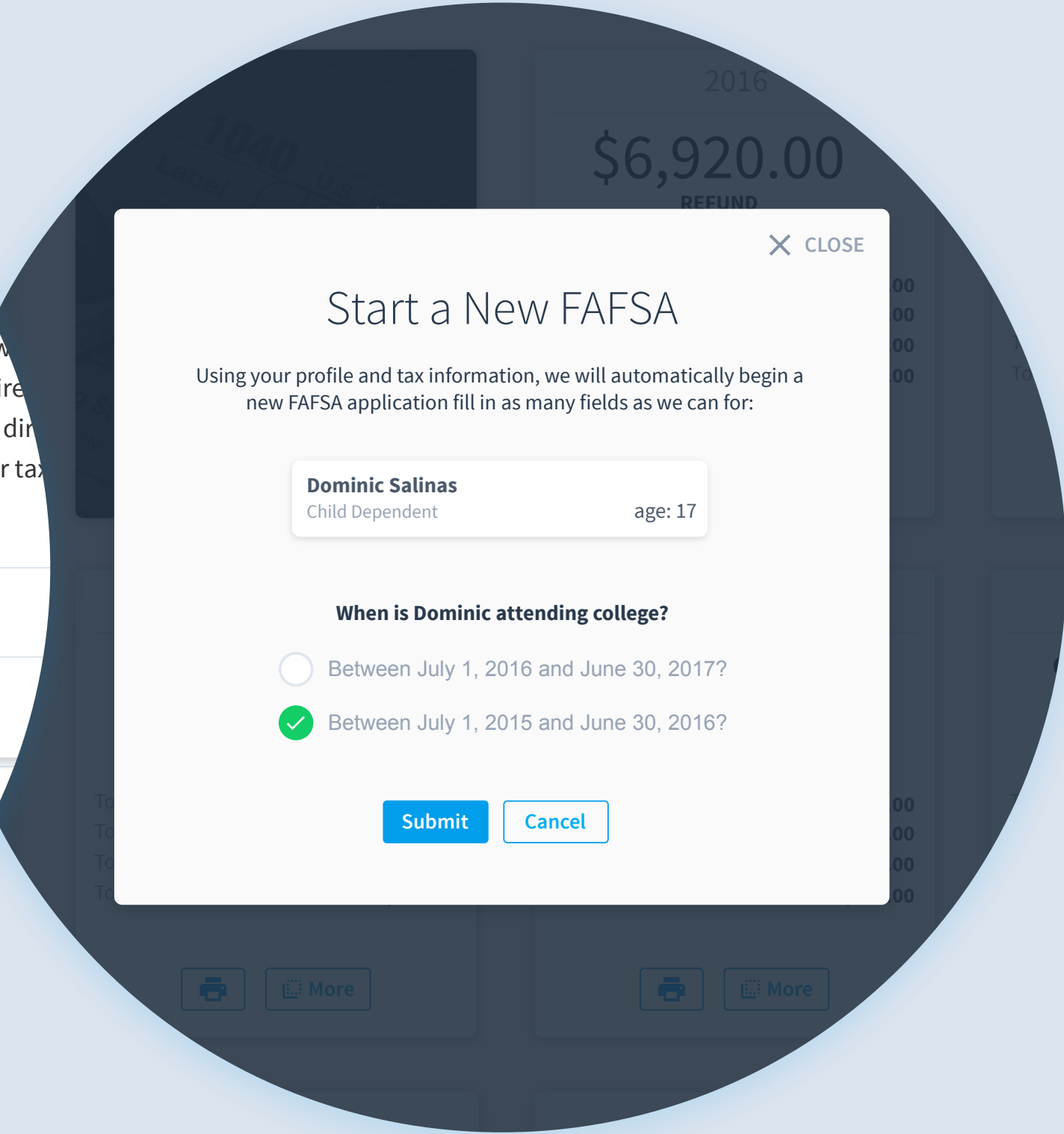
Submit   Cancel

✕ CLOSE

Tie-In with myRA

Profile information allows users to quickly apply or sign up for services like myRA that can automatically deposit a portion of a refund into their IRA.
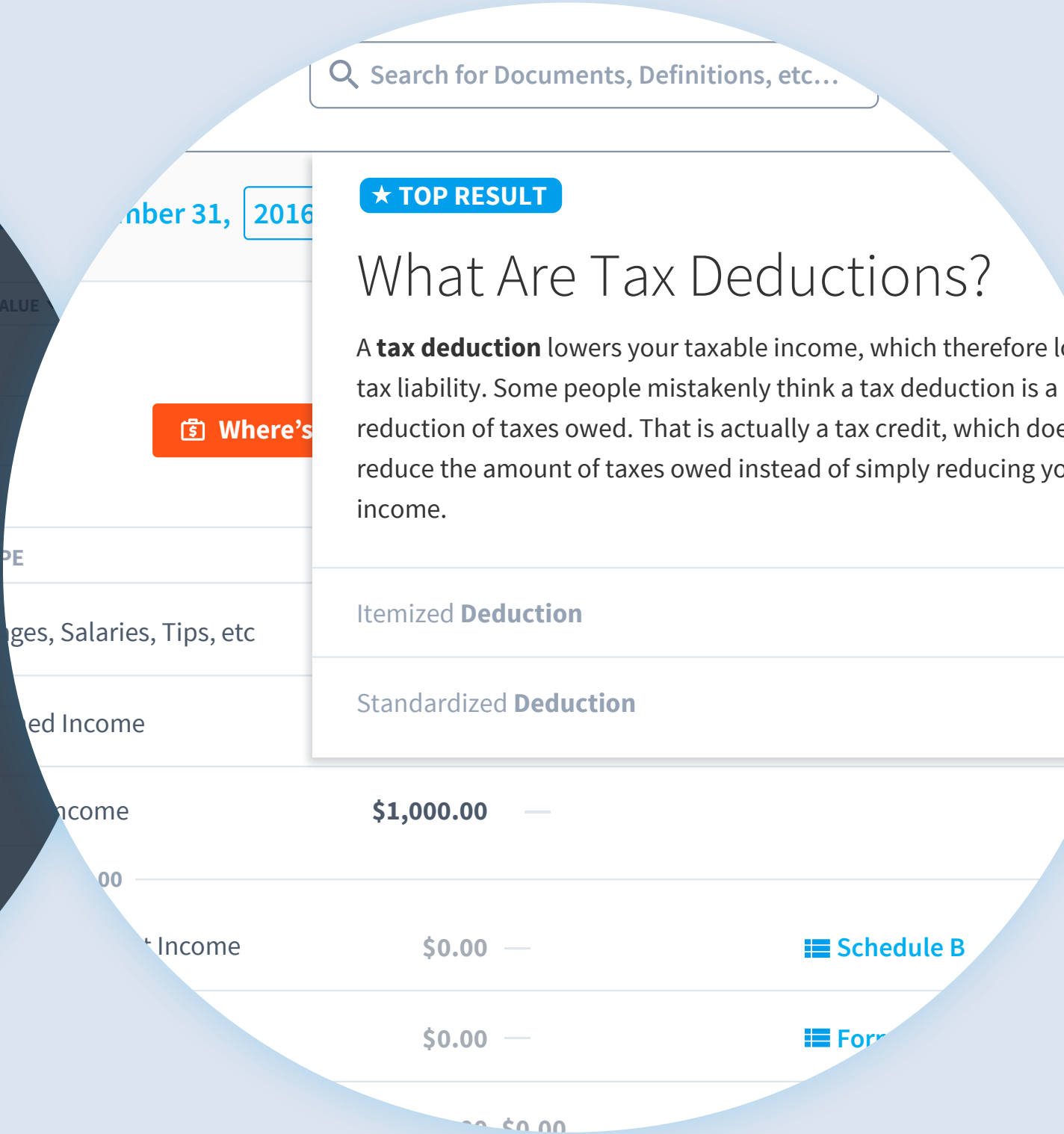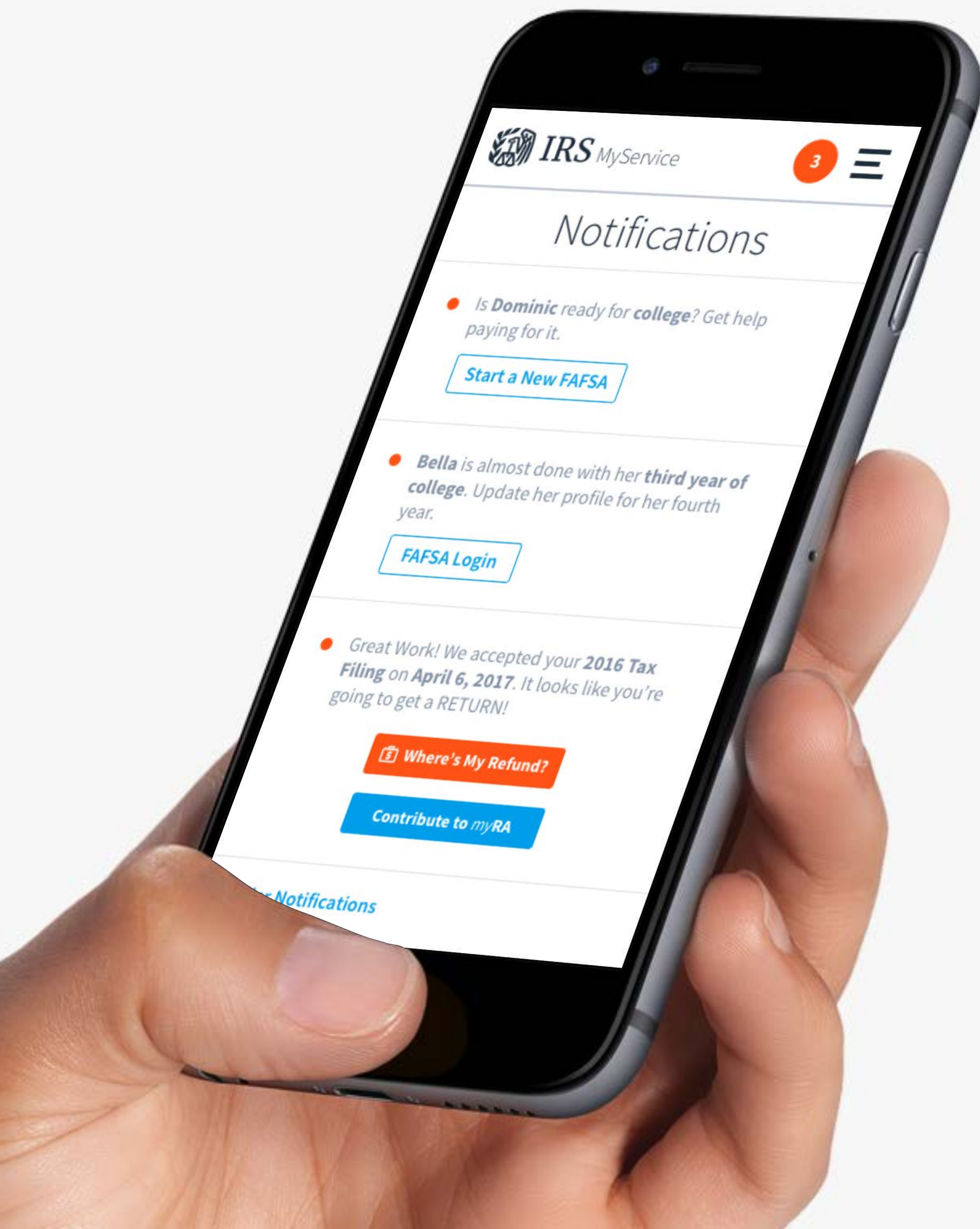
Smart Search

A search tool that is in-tune with defining complex tax terminology in simple conversational terms.

Tie-In with FAFSA

Applying for FAFSA for you or your dependents is as easy as selecting the person attending school and the year which to apply for. Profile information and tax information will be fed into the application giving you a head-start.

MOBILE ACCESSIBILITY

Mobile devices and MyService Notifications are where our four goals converge into one use. Notifications are _actionable_ with clear steps leading user toward their goals. They are _comprehensible_ in that they try to maximize your financial benefits in simple terms. It remains _humble_, only notifying you when deadlines approach or for important tips. Most importantly, we notify the people who need the information the most…

29% of households with a family income of less than $25,000 _access_ online services solely through mobile devices according to data collected by U.S. Census Bureau's Computer and Internet Use Supplement in 2015

Ask anyone to tell you about an experience they had with taxes and the IRS… **now**

Thank You