

# Form e-911 Redesign

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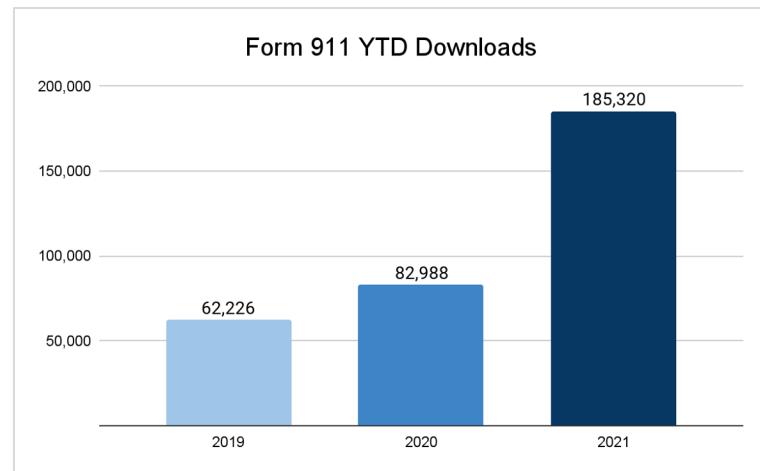
# Project Overview

- **Background:** Form 911 is used by taxpayers to request for assistance if they have been unable to resolve their tax issues through normal channels and are facing undue hardship as a result of the IRS actions or inactions. To qualify for assistance a taxpayer is required to meet specific criteria defined by TAS.
- **Target Audience:** Taxpayers who are experiencing a systemic tax issue or extreme financial hardship and *TAS Case Advocates* who receive the forms and provide assistance.



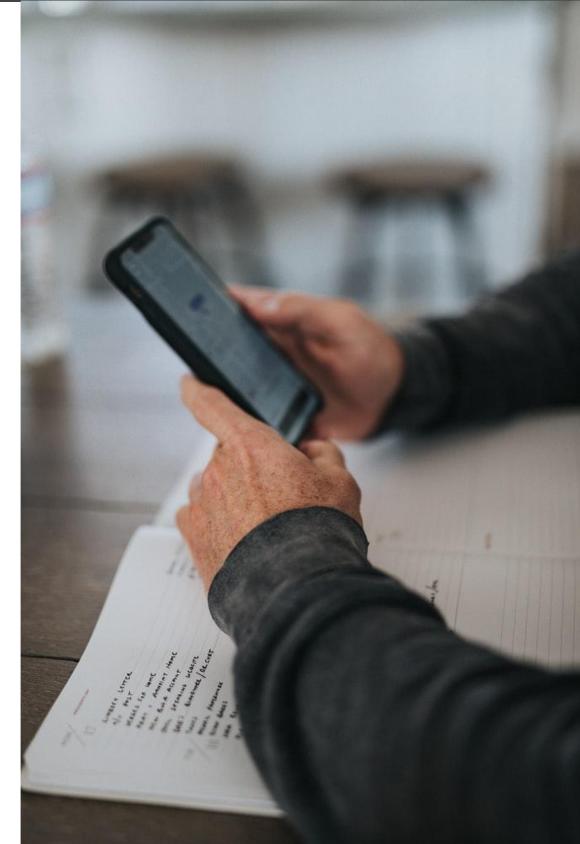
# Problem

- **Problem:** This form is one of the most frequently downloaded forms at the IRS, with the total number of downloads more than doubling in 2021. However, many taxpayers have submitted the form without meeting the qualifications for 911 assistance. The lengthy submission process also requires users to download the form, fill out their information, and then scan and fax or mail the form to a TAS office.



# Our Goal

- **Our Goal:** Improve the taxpayer experience by creating an expanded pre-qualifier for the current TAS Acceptance Tool to ensure a taxpayer meets the criteria before submitting. We also wanted to design an electronic process for submitting Form 911 that can be integrated with the qualifier and supported on mobile devices.



# The New Submission Process

Pre-Qualifier

TAS Acceptance Tool

Form e-911

Create an expanded pre-qualifier that determines if the taxpayer is eligible for the TAS acceptance tool

Integrate the form with the expanded qualifier tool

Design an electronic version of Form 911 that is accessible for desktops and mobile devices

# Pre-Qualifier

- Design was informed by a TAS intake guide
- Guides the user through a series of questions to help determine if they meet the necessary pre-reqs before accessing the TAS acceptance tool and identifies alternative options for taxpayers who don't qualify

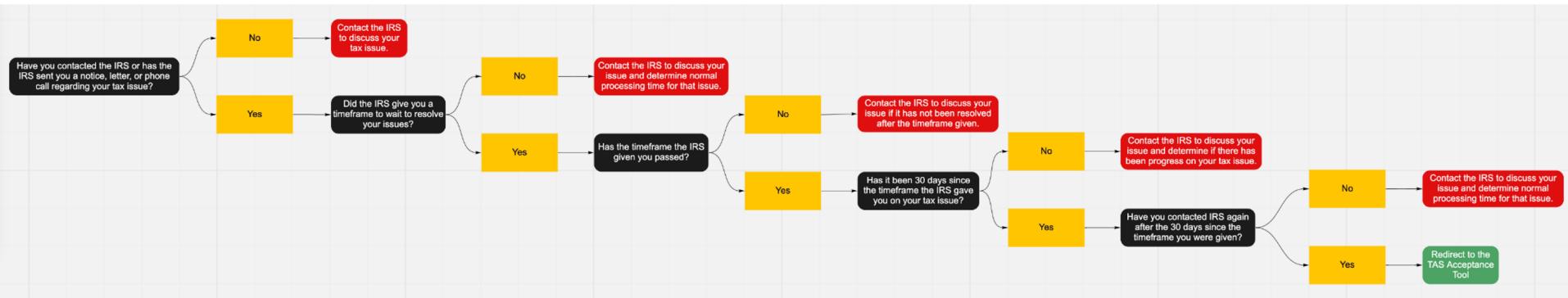
Pre-Qualifier for TAS Acceptance Tool

Have you contacted the IRS or has the IRS sent you a notice, letter, or phone call regarding your tax issue?

Yes      No

# User Flow for Pre-Qualifier

- Designed a user flow for the pre-qualifier in Miro to map out the user's actions



# Pre-Qualifier Results

## Positive Eligibility Result

ELIGIBILITY RESULTS

✓

### TAS Acceptance Tool

Use this tool to see if you meet TAS acceptance criteria based on one of the four main categories.

Note: While the results of the TAS qualifier tool may indicate if TAS can help you with your tax issue, the final determination will be made by one of our Advocates.

TAS Acceptance Tool →

## Negative Eligibility Result

ELIGIBILITY RESULTS

✓

Contact the IRS to discuss your issue.

✉ Mail:

[Find out where to file your return](#)

✉ International:

Tel: [267-941-1000](tel:267-941-1000) (not toll-free)

Fax: [681-247-3101](tel:681-247-3101) (for international tax account issues only)

Online Options:

[File your tax return online](#)

# Integrate with TAS Acceptance Tool

TAS may be able to Help You

## Find out if TAS can help you based on one of these reasons

- Financial Hardship
- IRS System Issue
- Fair & Equitable Treatment

Continue →

## Positive Result

**ELIGIBILITY RESULTS**

TAS May Be Able to Help You

Based on your answers to the questions, TAS may be able to help you.

To get started with TAS, complete Form 911, Request for Taxpayer Advocate Service Assistance. Next, choose one of the steps below to submit it to the Local Taxpayer Advocate in your area.

**Complete Form 911 Online**

**Mobile:**  
Fill out the form entirely online and submit through our website with a mobile friendly version.

**OR**

**Download Form 911 PDF and Submit**

**Electronically:**  
Download the PDF form and submit through our website.

[Get Help online 24/7 with general tax topics →](#)

## Negative Result

**ELIGIBILITY RESULTS**

Additional Options

Based on your answers to the questions, you may not need to speak directly with an advocate. Visit the TAS Get Help topics to learn how you can resolve common tax issues.

If you think one of the other categories may apply to you or your situation you can restart the tool.

You may benefit from our other services.

**Get Help:**  
TAS offers several different Get Help Topics; to help guide you through common tax issues.

**Find your Local Taxpayer Advocate:**  
Use our office locator to find an office in your state.

**Call:**  
Call us at 877-777-4778 to speak with an Advocate.

**Taxpayer Feedback:**  
Did you get a notice or letter from the IRS and you are not sure what to do?  
[View our Taxpayer Feedback page](#)

# Integrate with TAS Acceptance Tool

- If the acceptance tool deemed the taxpayer eligible, they will be presented with two options for submitting Form 911
  - Option 1: Complete an HTML version of the form online using a desktop or mobile device to submit electronically
  - Option 2: Download a PDF of the form to fill out and submit electronically

The screenshot shows a digital interface for the TAS Acceptance Tool. At the top, a green bar displays "ELIGIBILITY RESULTS". Below it, a dark blue section features a checkmark icon and the text "TAS May Be Able to Help You". A message states: "Based on your answers to the questions, TAS may be able to help you." Further down, instructions advise users to "get started with TAS, complete Form 911, Request for Taxpayer Advocate Service Assistance. Next, choose one of the steps below to submit it to the Local Taxpayer Advocate in your area." Two options are listed: "Complete Form 911 Online" (with a "Mobile" sub-option) and "Download Form 911 PDF and Submit" (with an "Electronically" sub-option). A footer link offers "Get Help online 24/7 with general tax topics" followed by a right-pointing arrow.

ELIGIBILITY RESULTS

TAS May Be Able to Help You

Based on your answers to the questions, TAS may be able to help you.

To get started with TAS, complete Form 911, Request for Taxpayer Advocate Service Assistance. Next, choose one of the steps below to submit it to the Local Taxpayer Advocate in your area.

**Complete Form 911 Online**

**Mobile:**  
Fill out the form entirely online and submit through our website with a mobile friendly version.

**OR**

**Download Form 911 PDF and Submit**

**Electronically:**  
Download the PDF form and submit through our website.

Get Help online 24/7 with general tax topics →

# Issues with Current Form 911 (PDF)

- **Incompatible with mobile devices**

# Issues with Current Form 911 (PDF)

- Incompatible with mobile devices
- **Instructions located on separate pages**

Form 911 (May 2010) Request for Taxpayer Advocate Service Assistance (And Application for Taxpayer Assistance Order)		OMB Number 1545-1594
<b>Section I – Taxpayer Information</b> (See Pages 2 and 4 for Form 911 Filing Requirements and Instructions for Completing this Form)		
1a. Your name as shown on tax return	1b. Taxpayer Identifying Number (SSN, ITIN, EIN)	
2a. Spouse's name as shown on tax return (if applicable)	2b. Spouse's Taxpayer Identifying Number (SSN, ITIN)	
3a. Your current street address (Number, Street, & Apt. Number)		
3b. City		
4. Fax number (if applicable)	5. Email address	
6. Tax form number (1040, 941, 729, etc.)		
8. Person to contact if Section II is not being used		
10. Best time to call		
11. Preferred language (if applicable)		
<input type="checkbox"/> English	<input type="checkbox"/> Interpreter needed? - Specify language	
<input type="checkbox"/> Other		
12a. Please describe the tax issue you are experiencing and all (if more space is needed, attach additional sheets) (See instructions)		
12b. Please describe the relief/assistance you are requesting (A)		
I understand that Taxpayer Advocate Service employees may contact me to make further inquiry. By authorizing the Taxpayer Advocate Service, I am waiving my right to receive notice, practice and hearing before the Internal Revenue Service.		
13a. Signature of taxpayer or Corporate Officer, and title, if applicable		
14a. Signature of spouse		
<b>Section II – Representative Information</b> (Attach)		
1. Name of authorized representative		
3. Current mailing address		
6. Signature of representative		
Catalog Number 109655		
<b>Instructions for completing Form 911</b>		
Form 911 Filing Requirements		
The Taxpayer Advocate Service (TAS) is an <b>independent</b> organization within the IRS that helps taxpayers and protects taxpayer rights. We can help you resolve problems you can't resolve with the IRS. And our service is free. TAS can help you:		
<ul style="list-style-type: none"><li>Your problem is causing financial difficulty for you, your family, or your business.</li><li>You face or your business is facing an immediate threat of adverse action.</li><li>You have tried repeatedly to contact the IRS but no one has responded, or the IRS hasn't responded by the date promised.</li></ul>		
TAS generally asks the IRS to stop certain activities while your request for assistance is pending (for example, audits, levies, and appeals).		
<b>Where to Send this Form</b>		
<ul style="list-style-type: none"><li>The quickest method is <b>Fax</b>. TAS has at least one office in every state, the District of Columbia, and Puerto Rico. You can fax your request to the office nearest you. See the list of TAS offices in the <b>Taxpayer Advocate Service Office Locations directory</b>, on our website at <a href="http://www.taxpayeradvocateservice.gov">www.taxpayeradvocateservice.gov</a>, or in Publication 1546, <b>Taxpayer Advocate Service – Your Voice at the Tax Table</b>.</li><li>You also can <b>mail</b> this form. You can find the mailing address and phone number (even) of your local Taxpayer Advocate office in your phone book, on our website, and in Pub. 1546, or get this information by calling our toll-free number 1-877-777-TASC (8272).</li><li>Are you sending the form from overseas? Fax it to 1-855-818-5697 or mail it to <b>Taxpayer Advocate Service, Internal Revenue Service, PO Box 1996, San Juan, Puerto Rico 00922</b>. Please be sure to fill out the form completely and submit it to the TAS office nearest you so we can work your issue as soon as possible.</li></ul>		
<b>What Happens Next?</b>		
If you don't hear from us within one week of submitting Form 911, please call the TAS office where you sent your request. You can find the telephone number in the <b>Office Locations directory</b> .		
<b>Important Notes:</b> Please be aware that by submitting this form, you are authorizing TAS to contact third parties as necessary to respond to your request, and you may not receive further notice about these contacts. For more information see IRS IRM 02020.		
<b>Cautions:</b> TAS will not consider frivolous arguments raised on this form. You can find examples of frivolous arguments in Publication 1546, <b>Taxpayer Advocate Service – Your Voice at the Tax Table</b> , or in Publication 1544, <b>Taxpayer Advocate Service Paperwork Reduction Act Notice</b> .		
Your responsibility is voluntary. You are not required to provide the information requested on a form that is subject to the <b>Privacy Act</b> . If you do provide information, you are giving the IRS permission to use it. TAS may use this information to assist you. This information must be retained as long as three years or longer if it becomes involved in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103. Although the time needed to complete this form may vary, TAS will not charge you for this service.		
Should you have comments concerning the accuracy of this time estimate or suggestions for making this form simpler, please write to <b>Internal Revenue Service, Tax Products Coordinating Committee, Room 6460, 1111 Constitution Ave. NW, Washington, DC 20224</b> .		
<b>Instructions for Section I</b>		
<ol style="list-style-type: none"><li>Enter your name as shown on the tax return that relates to this request for assistance.</li><li>Enter your Social Security Number. If you're an individual this will be either a Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN). If you're a business entity this will be your Employer Identification Number (EIN) (e.g., a partnership, corporation, trust or self-employed individual with employees).</li><li>If you're a business entity, enter your business name and address (as a party to the return).</li><li>Enter your spouse's Taxpayer Identifier (SSN or ITIN) if the request relates to a jointly filed return.</li><li>Enter your current mailing address, including street number and name, city, state, or foreign country, and zip code.</li><li>Enter your fax number, including the area code.</li><li>Enter your email address. We'll not, however, use your email address to discuss the specifics of your case.</li><li>Enter the number of the Federal tax return or form that relates to this request. For example, an individual taxpayer with an income tax return would enter Form 1040.</li><li>Enter the quarterly, annual, or other tax year or period that relates to this request. For example, if the request involves an income tax issue, write the calendar or fiscal year. If an employment tax issue, enter the calendar quarter.</li></ol>		
<b>Instructions for Section I</b> continue on the next page ►		
Catalog Number 109655      www.irs.gov      Form 911 (Rev. 5-2010)		

# Issues with Current Form 911 (PDF)

- Incompatible with mobile devices
- Instructions located on separate pages
- **Some sections are confusing or irrelevant to the taxpayer**

Page 2

Section III – Initiating Employee Information <small>(Section III is to be completed by the IRS only)</small>				
Taxpayer name		Taxpayer Identifying Number (TIN)		
1. Name of employee	2. Phone number	3a. Function	3b. Operating division	4. Organization code no.
5. How identified and received <small>(Check the appropriate box)</small>				
<b>IRS Function identified issue as meeting Taxpayer Advocate Service (TAS) criteria</b>				
<input type="checkbox"/> (r) Functional referral <small>(Function identified taxpayer issue as meeting TAS criteria)</small>				
<input type="checkbox"/> (x) Congressional correspondence/inquiry not addressed to TAS but referred for TAS handling				
Name of Senator/Representative _____				
6. IRS received date _____				
7. TAS criteria <small>(Check the appropriate box. NOTE: Checkbox 9 is for TAS Use Only)</small>				
<input type="checkbox"/> (1) The taxpayer is experiencing economic harm or is about to suffer economic harm.				
<input type="checkbox"/> (2) The taxpayer is facing an immediate threat of adverse action.				
<input type="checkbox"/> (3) The taxpayer will incur significant costs if relief is not granted (including fees for professional representation).				
<input type="checkbox"/> (4) The taxpayer will suffer irreparable injury or long-term adverse impact if relief is not granted. <i>If any items 1-4 are checked, complete Question 9 below</i>				
<input type="checkbox"/> (5) The taxpayer has experienced a delay of more than 30 days to resolve a tax account problem.				
<input type="checkbox"/> (6) The taxpayer did not receive a response or resolution to their problem or inquiry by the date promised.				
<input type="checkbox"/> (7) A system or procedure has either failed to operate as intended, or failed to resolve the taxpayer's problem or dispute within the IRS.				
<input type="checkbox"/> (8) The manner in which the tax laws are being administered raise considerations of equity, or have impaired or will impair the taxpayer's rights.				
<input type="checkbox"/> (9) The NTA determines compelling public policy warrants assistance to an individual or group of taxpayers <b>(TAS Use Only)</b>				
8. What action(s) did you take to help resolve the issue? <b>(This block MUST be completed by the initiating employee)</b> <i>If you were unable to resolve the issue, state the reason why (if applicable)</i>				

# Issues with Current Form 911 (PDF)

- Incompatible with mobile devices
- Instructions located on separate pages
- Some sections are confusing or irrelevant to the taxpayer
- **Unable to submit electronically**

# Issues with Current Form 911 (PDF)

- Incompatible with mobile devices
- Instructions located on separate pages
- Some sections are confusing or irrelevant to the taxpayer
- Unable to be submitted electronically
- **Attaching additional documents is complicated**

Form 911 (May 2019) Department of the Treasury - Internal Revenue Service <b>Request for Taxpayer Advocate Service Assistance</b> (And Application for Taxpayer Assistance Order)		OMB Number 1545-1504
<b>Section I – Taxpayer Information</b> (See Pages 3 and 4 for Form 911 Filing Requirements and Instructions for Completing this Form.)		
1a. Your name as shown on tax return	1b. Taxpayer Identifying Number (SSN, ITIN, EIN)	
2a. Spouse's name as shown on tax return (if applicable)	2b. Spouse's Taxpayer Identifying Number (SSN, ITIN)	
3a. Your current street address (Number, Street, & Apt. Number)		
3b. City	3c. State (or Foreign Country)	3d. ZIP code
4. Fax number (if applicable)	5. Email address	
6. Tax form number (1040, 941, 720, etc.)		
7. Tax year(s) or period(s)		
8. Person to contact if Section II is not being used	9a. Daytime phone number	9b. <input type="checkbox"/> Check here if you consent to have confidential information about your tax issue sent to your answering machine or voice message at this number.
10. Best time to call	<input type="checkbox"/> Check if Cell Phone	
11. Preferred language (if applicable) <input type="checkbox"/> TTY/TDD Line <input type="checkbox"/> Interpreter needed - Specify language other than English (including sign language) <input type="checkbox"/> Other (please specify)		
12a. Please describe the tax issue you are experiencing and any difficulties it may be creating (If more space is needed, attach additional sheets.) (See instructions for completing Lines 12a and 12b)		
12b. Please describe the relief/assistance you are requesting (If more space is needed, attach additional sheets.)		
I understand that Taxpayer Advocate Service employees may contact third parties in order to respond to this request and reduce the cost of such contacts to be made. Further, by authorizing the Taxpayer Advocate Service to contact third parties, I understand that I will not receive notice, pursuant to section 7602(c) of the Internal Revenue Code, of third parties contacted in connection with this request.		
13a. Signature of Taxpayer or Corporate Officer, and title, if applicable	13b. Date signed	
14a. Signature of spouse	14b. Date signed	
<b>Section II – Representative Information</b> (Attach Form 2848 if not already on file with the IRS.)		
1. Name of authorized representative	2. Centralized Authorization File (CAF) number	
3. Current mailing address	4. Daytime phone number <input type="checkbox"/> Check if Cell Phone	
5. Fax number		
6. Signature of representative		7. Date signed
Catalog Number 169655      www.irs.gov      Form 911 (Rev. 5-2019)		

# Redesigned Form 911

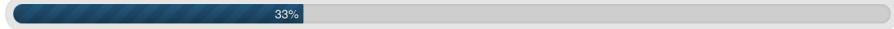
- An HTML version of Form 911 was created using the Gravity Forms plugin within WordPress (the content management system that hosts the TAS website)
- Deconstructed the traditional PDF version of Form 911 and redesigned it to create a more streamlined user experience
- Identified how the data from the new forms were stored in the back-end of WordPress and could be exported for Case Advocates



# New Form e-911 (Gravity Forms)

- Instructions and criteria information are available on page 1

Step 1 of 3



**Form 911 Filing Requirements**

The Taxpayer Advocate Service (TAS) is an independent organization within the IRS that helps taxpayers and protects taxpayer rights. We can help you resolve problems you can't resolve with the IRS. And our service is free. TAS can help you if:

- Your problem is causing financial difficulty for you, your family, or your business.
- You face (or your business is facing) an immediate threat of adverse action.
- You've tried repeatedly to contact the IRS but no one has responded, or the IRS hasn't responded by the date promised.

TAS will generally ask the IRS to stop certain activities while your request for assistance is pending (for example, lien filings, levies, and seizures).

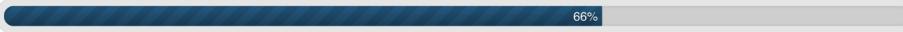
Caution: TAS will not consider frivolous arguments raised on this form. You can find examples of frivolous arguments in [Publication 2105, Why do I have to Pay Taxes?](#) If you use this form to raise frivolous arguments, you may be subject to a penalty of \$5,000.

Paperwork Reduction Act Notice: We ask for the information on this form to carry out the Internal Revenue laws of the United States. Your response is voluntary. You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103. Although the time needed to complete this form may vary depending on individual circumstances, the estimated average time is 30 minutes.

[Next](#)

# New Form e-911 (Gravity Forms)

- Text inputs with descriptions help users understand what information they should enter

Step 2 of 3 

## Section I - Taxpayer Information

**1a. Your name as shown on tax return \***  
Enter your name as shown on the tax return that relates to this request for assistance.

**1b. Taxpayer Identifying Number (SSN, ITIN, EIN) \***  
Enter your Taxpayer Identifying Number. If you're an individual this will be either a Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN). If you're a business entity this will be your Employer Identification Number (EIN) (e.g. a partnership, corporation, trust or self-employed individual with employees).

**2a. Spouse's name as shown on tax return (if applicable)**  
Enter your spouse's name (if applicable) if this request relates to a jointly filed return.

**2b. Spouse's Taxpayer Identifying Number (SSN, ITIN)**  
Enter your spouse's Taxpayer Identifying Number (SSN or ITIN) if this request relates to a jointly filed return.

**3a. Your current street address (Number, Street, & Apt. Number) \***  
Enter the street name, number, and apt. number for your current mailing address.

**3b. City \***  
Enter the city for your current mailing address.

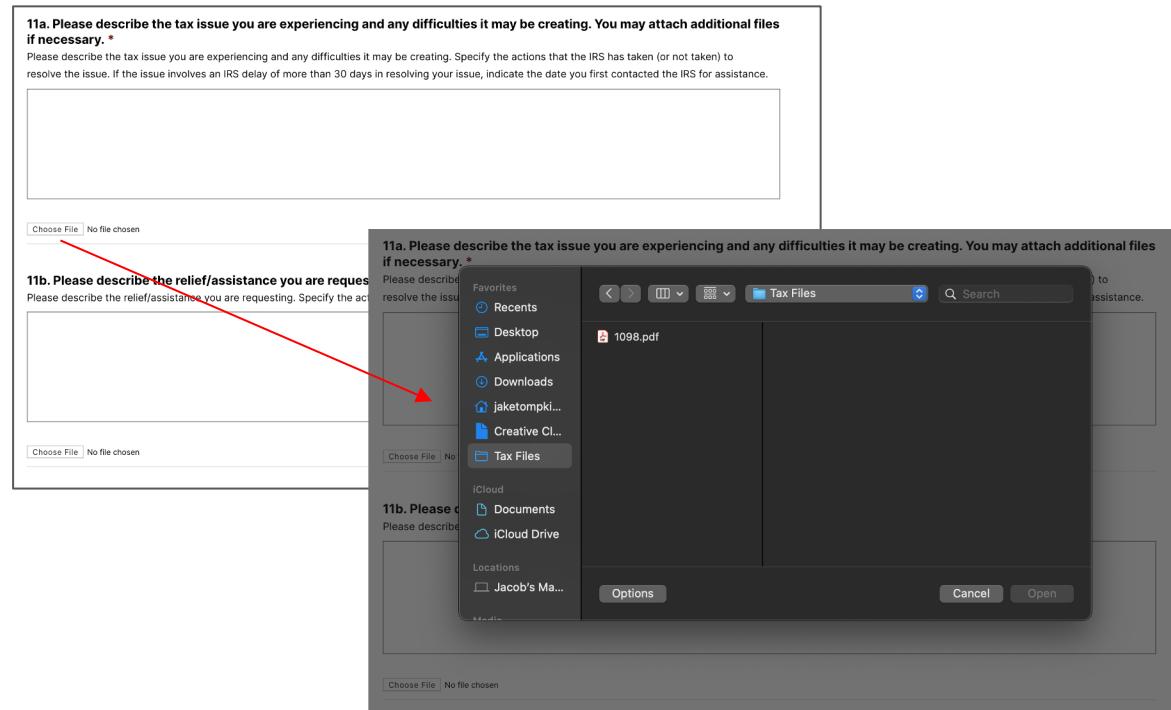
**3c. State (or Foreign Country) \***  
Enter the state for your current mailing address.

**3d. ZIP code \***  
Enter the zip code for your current mailing address.

**4. Fax number (if applicable)**  
Enter your fax number, including the area code.

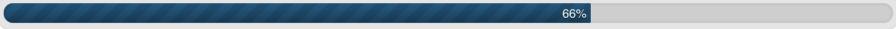
# New Form e-911 (Gravity Forms)

- Allows you to attach additional files directly from your device



# New Form e-911 (Gravity Forms)

- Recover from errors with baked-in field requirements and error messages

Step 2 of 3 

**There was a problem with your submission. Errors have been highlighted below.**

**Section I - Taxpayer Information**

**1a. Your name as shown on tax return \***  
Enter your name as shown on the tax return that relates to this request for assistance.

**1b. Taxpayer Identifying Number (SSN, ITIN, EIN) \***  
Enter your Taxpayer Identifying Number. If you're an individual this will be either a Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN). If you're a business entity this will be your Employer Identification Number (EIN) (e.g. a partnership, corporation, trust or self-employed individual with employees).  
  
**This field is required.**

**2a. Spouse's name as shown on tax return (if applicable)**  
Enter your spouse's name (if applicable) if this request relates to a jointly filed return.

**2b. Spouse's Taxpayer Identifying Number (SSN, ITIN)**  
Enter your spouse's Taxpayer Identifying Number (SSN or ITIN) if this request relates to a jointly filed return.

**3a. Your current street address (Number, Street, & Apt. Number) \***  
Enter the street name, number, and apt. number for your current mailing address.

**3b. City \***  
Enter the city for your current mailing address.

**3c. State (or Foreign Country) \***  
Enter the state for your current mailing address.

**3d. ZIP code \***  
Enter the zip code for your current mailing address.

# New Form e-911 (Gravity Forms)

- Automatically hide sections that are irrelevant to the taxpayer and reveal them when applicable (i.e., *Section II* if a representative is **not** requested)

The screenshot shows a web-based form interface for the HON-Prod Development Environment. At the top, there's a red header bar with the 'ADVOCATE SERVICE' logo and a 'Taxpayer Bill of Rights' button. Below the header, a navigation bar includes links for 'Get Help', 'Resources for Taxpayers', 'Tax News & Information', 'Our Reports to Congress', and 'Contact Us'. A search bar is also present.

The main content area is titled 'Step 3 of 3' and features a progress bar indicating 100% completion. A question 'Do you wish to have a representative act on your behalf?' is displayed with two radio button options: 'Yes' and 'No'. Below this, a section titled 'Person to contact if a representative is not chosen' contains a text input field for entering the name of the individual authorized to act on behalf of the entity.

At the bottom of the form, there are 'Previous' and 'Submit' buttons. A success message 'We're your advocate' is centered at the bottom of the page.

# New Form e-911 (Gravity Forms)

- User is immediately informed that their form has been submitted successfully
- Receive a verification email with a copy of their completed form to review

The screenshot shows the Advocate Service website with a success message and an incoming email.

**Website Header:**

- ADVOCATE SERVICE
- YOUR VOICE AT THE IRS
- Search
- Taxpayer Bill of Rights

**Success Message:**

Your 911 Form has been submitted successfully!

**Email Confirmation:**

If you find th  
Import respon  
Should write t  
20224

Your Form 911 Submission with TAS inbox

Taxpayer Advocate Services <no-reply@tas.gov>  
to me

Your 911 Form has been submitted successfully!

**What Happens Next?**

If you don't hear from us within one week of submitting Form 911, please call the TAS office where you sent your request. You can find the number at [www.taxpayeradvocate.irs.gov](http://www.taxpayeradvocate.irs.gov).

**Important Notes:** Please be aware that by submitting this form, you are authorizing TAS to contact third parties as necessary to respond to your request, and you may not receive further notice about these contacts. For more information see IRC 7602(c).

Should you have comments concerning the accuracy of this time estimate or suggestions for making this form simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, Room 6406, 1111 Constitution Ave. NW, Washington, DC 20224.

**Here is what we received from you:**

**Section I - Taxpayer Information**

1a. Your name as shown on tax return  
Jacob Tompkins  
111-11-1111

1b. Taxpayer Identifying Number (SSN, ITIN, EIN)  
111-11-1111

2a. Spouse's name as shown on tax return (if applicable)  
Jane Doe

2b. Spouse's Taxpayer Identifying Number (SSN, ITIN)

# Questions?

