IRS Tax Design Challenge

IRS File Friend

A native app for iOS and Android smartphones
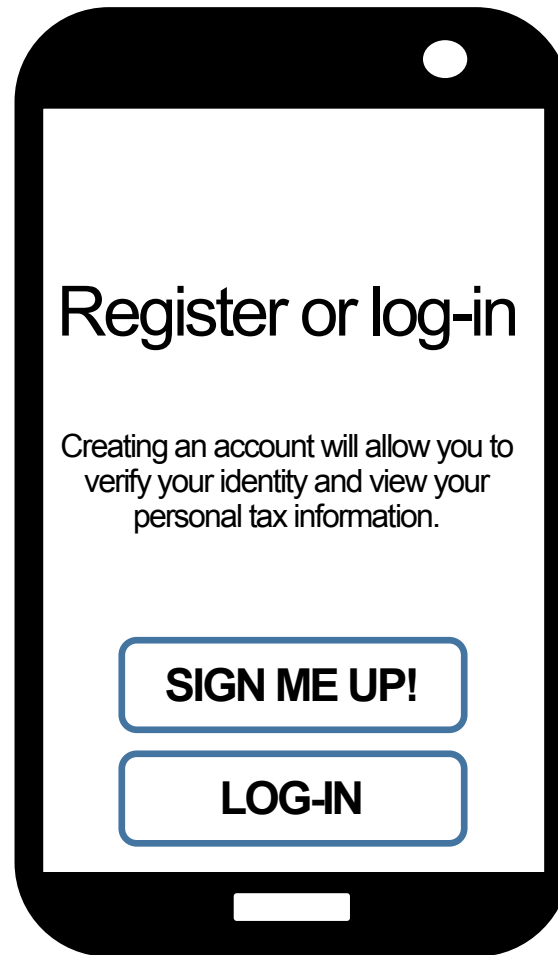
Welcome to
IRS File Friend

Helping you make sense of your tax information and plan for the future
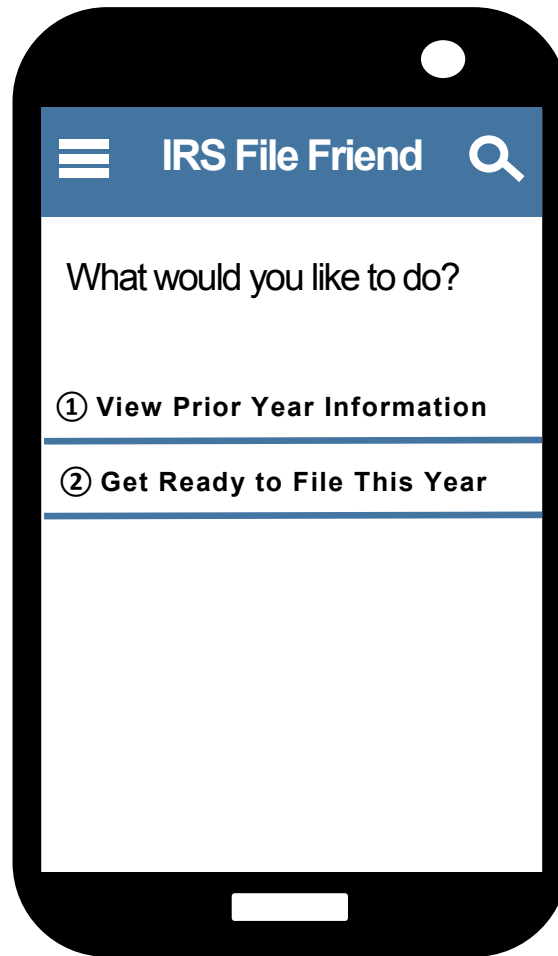
GET STARTED

Can be integrated into IRS2Go mobile app

Workflow allows for possibility of HTML5 mobile web application or desktop webpage formatting

Registration & Log-In Page

Register or log-in

Creating an account will allow you to verify your identity and view your personal tax information.

SIGN ME UP!

LOG-IN

Log-in is required each time app is launched, for added security

Main Menu

IRS File Friend

☰ **IRS File Friend** 🔍

What would you like to do?

① **View Prior Year Information**

② **Get Ready to File This Year**

View Prior Year Information

Prior Year Information: Tax Year Selection

IRS File Friend

View Prior Year Information

Which tax year would you like to view?

2013

2014

2015
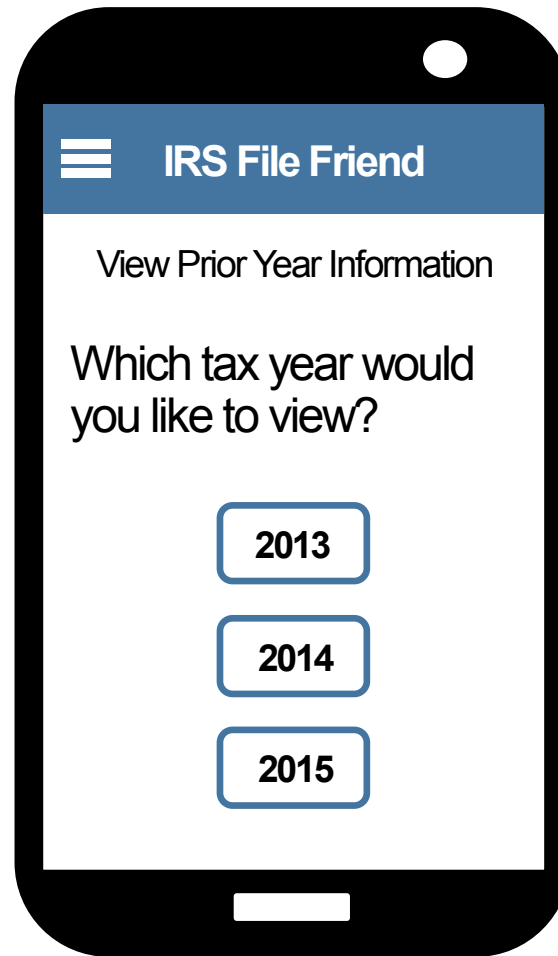
App utilizes phone's built-in back button

Prior Year Information: Tax Year Selection

IRS File Friend

View Prior Year Information

You submitted Forms 1040 and 1040X for Tax Year 2015. Which would you like to view?

1040

1040X

BOTH
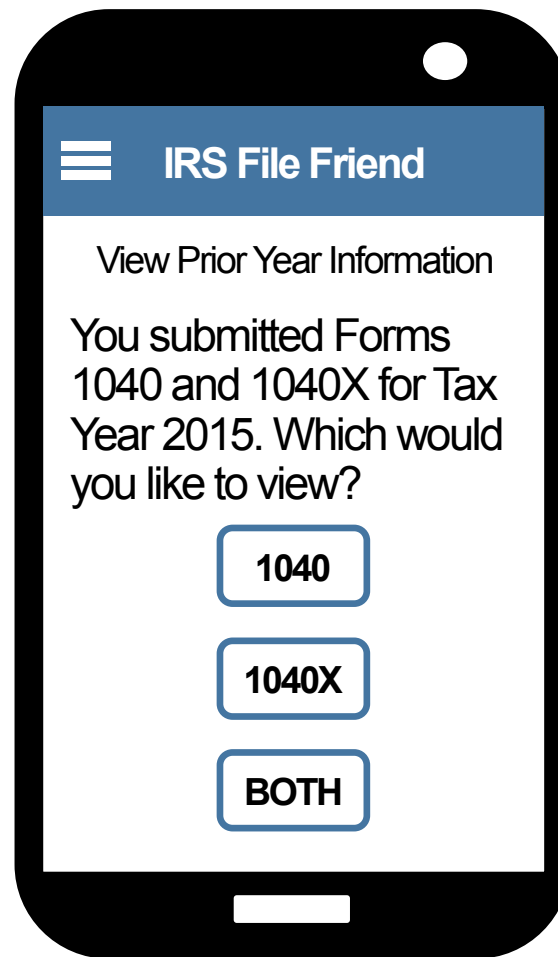
Large, mobile-friendly buttons for quick navigation

Prior Year Information: Tax Year Menu Page

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View Prior Year Information

Tax Year 2015

① **Personal Information**

② **Filing Status**

③ **Dependent Information**

④ **Income**

⑤ **Deductions**

⑥ **Taxes & Credits**

⑦ **Download as PDF**
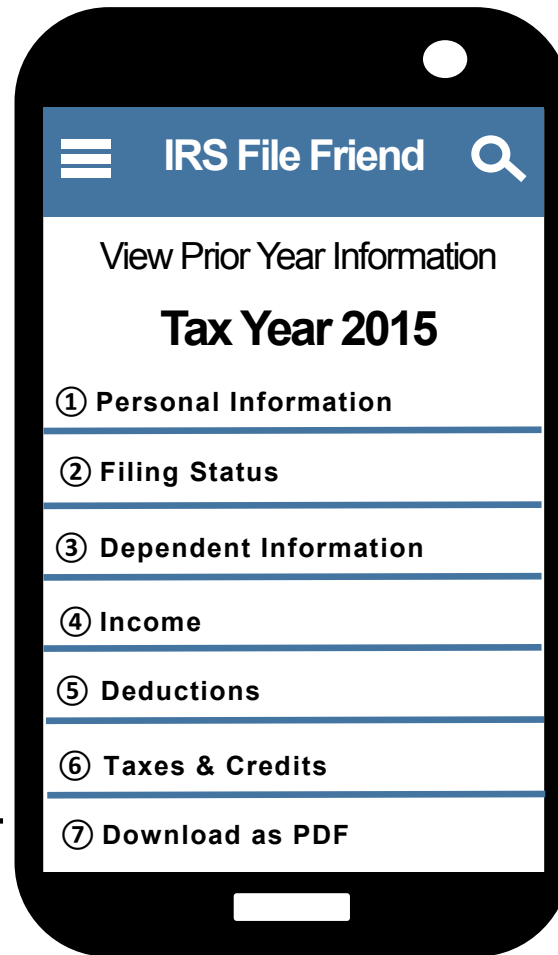
Broad introductory categories for ease of use

User can choose to view individual categories in app or entire report as PDF

View Prior Year Information: Income Sample

IRS File Friend

This is the income shown in your 2015 tax return.

Wages, salaries tips, etc.	$14,500
Business income or loss	$800
Pensions and annuities	$1,600
Total income	**$16,900**

MENU   TELL ME MORE
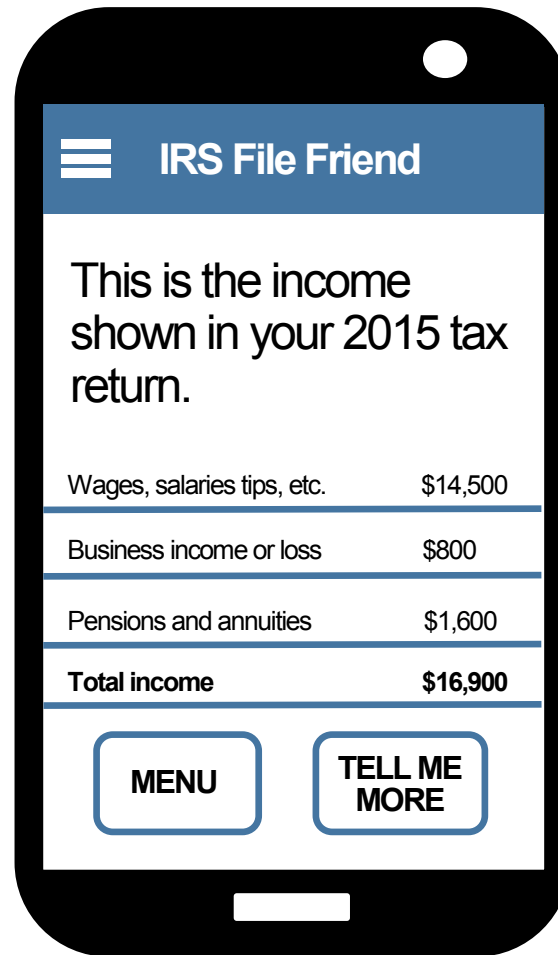
Directs user back to "View Prior Year Information" menu
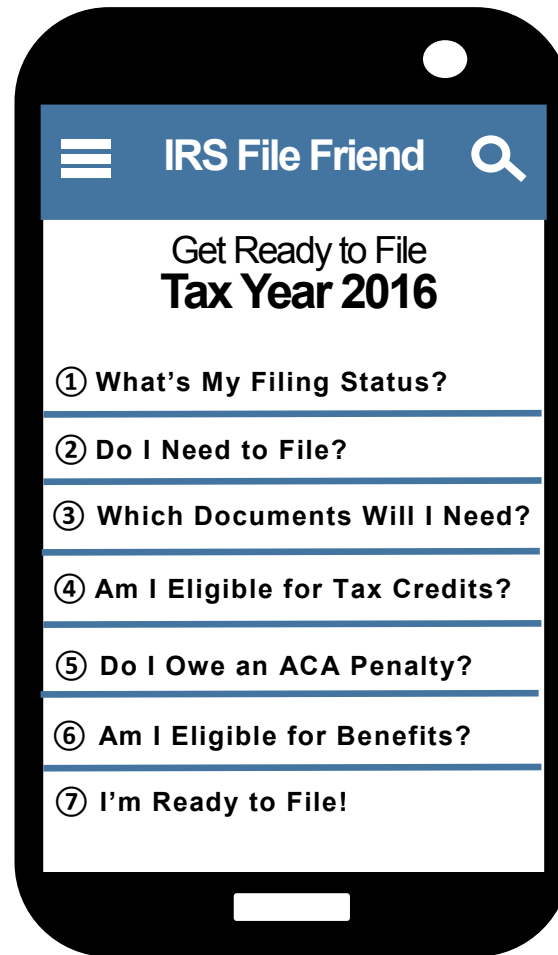
Directs user to pages with in-depth information about types of income, etc.

Get Ready to File

Get Ready to File: Menu Page

IRS File Friend

Get Ready to File
Tax Year 2016

① **What's My Filing Status?**

② **Do I Need to File?**

③ **Which Documents Will I Need?**

④ **Am I Eligible for Tax Credits?**

⑤ **Do I Owe an ACA Penalty?**

⑥ **Am I Eligible for Benefits?**

⑦ **I'm Ready to File!**

Get Ready to File: What's My Filing Status?

IRS File Friend

What's My Filing Status?

Your filing status is used to determine your filing requirements, standard deduction, eligibility for certain credits, and your correct tax.

Review last year's filing status, and tell us about any changes to your marital status or household makeup.

GET STARTED

≡ **IRS File Friend**

This is how you filed on last year's return.

Head of Household

WHAT'S THIS?

NEXT
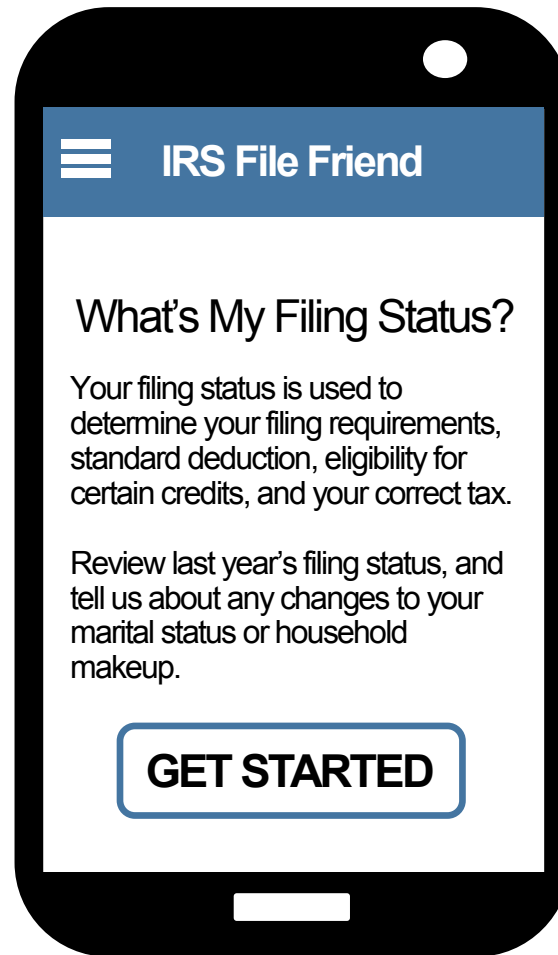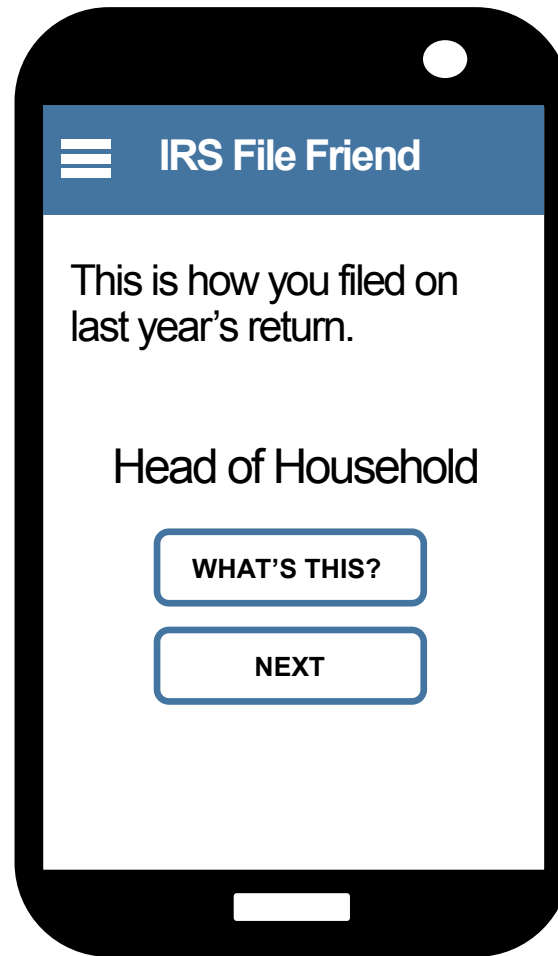
What's My Filing Status: Sample Question

IRS File Friend

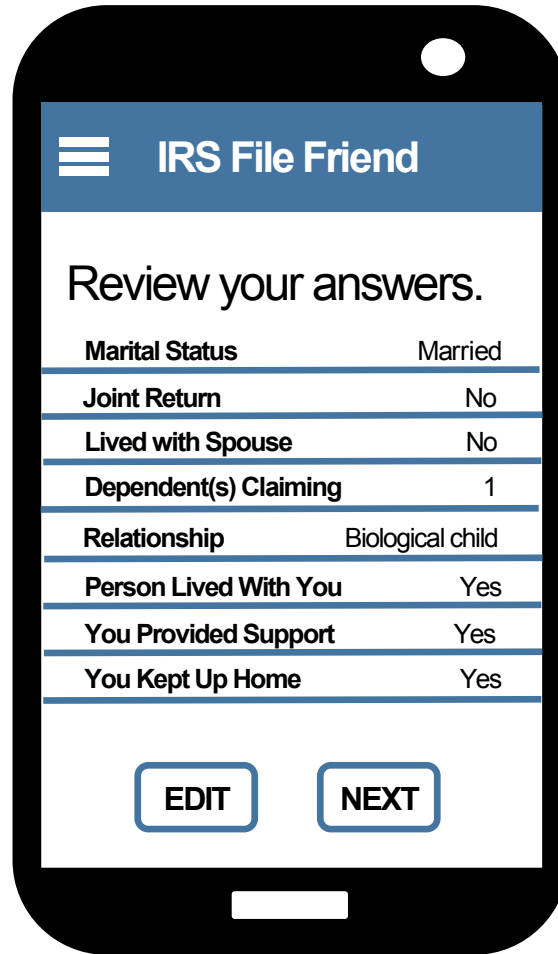What was your marital status on the last day of 2016?

Includes information found on irs.gov in a simplified, mobile-friendly format

SINGLE OR LEGALLY SEPARATED

MARRIED

WIDOWED DURING TAX YEAR

WIDOWED BEFORE TAX YEAR

What's My Filing Status: Sample Answer Summary

IRS File Friend

Review your answers.

Marital Status	Married
Joint Return	No
Lived with Spouse	No
Dependent(s) Claiming	1
Relationship	Biological child
Person Lived With You	Yes
You Provided Support	Yes
You Kept Up Home	Yes

EDIT   NEXT

What's My Filing Status: Sample Results

IRS File Friend

Based on your answers, this is your filing status for Tax Year 2016.

Head of Household

WHAT'S THIS?

NEXT
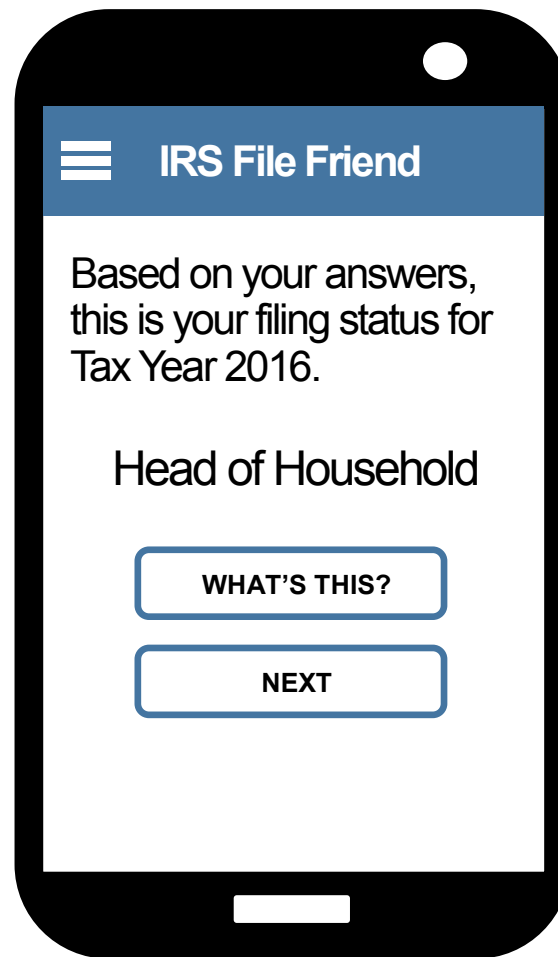
App keeps record of results, for user's future reference and for auto-population in other sections

What's My Filing Status: "What's This?" Sample

Head of Household

Though you're legally married, your filing status is Head of Household because you lived apart from your spouse for the last six months of the year, and you're claiming at least one dependent.

If either of these conditions change in the future, your filing status may be different.

MENU　　**NEXT**
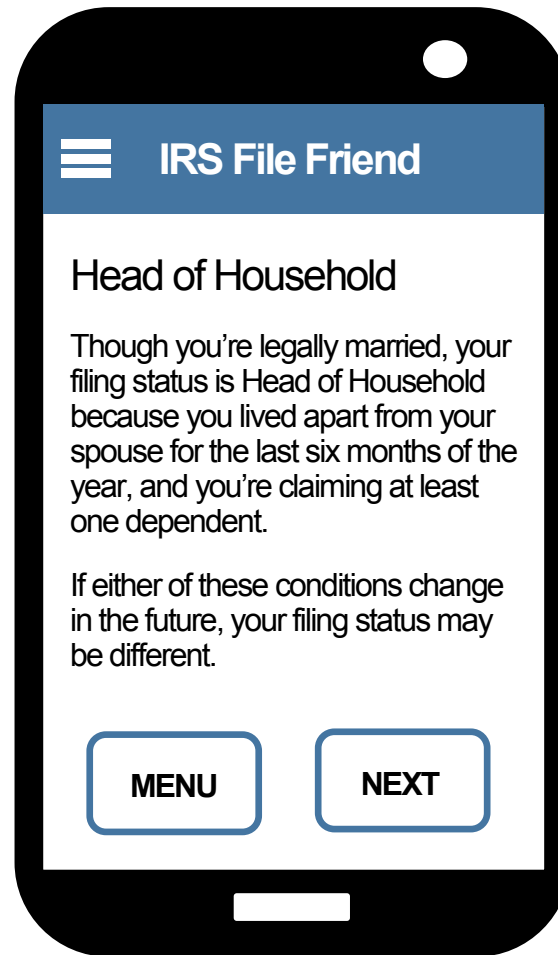
Get Ready to File: Do I Need to File?

Do I Need to File?

Now that we know your filing status, we're one step closer to finding out if you need to file this year.

Tell us about your **age** and **income** to finish this step.

GET STARTED

IRS File Friend
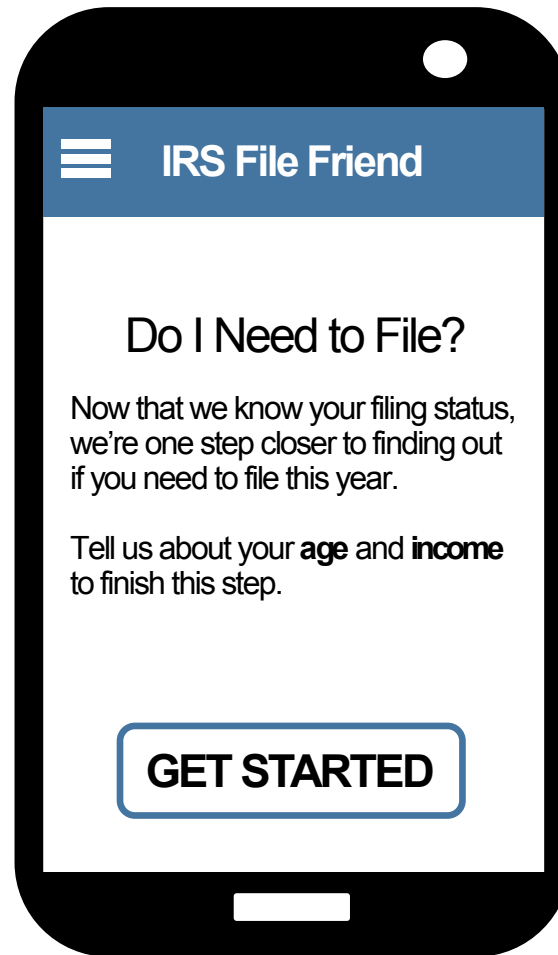
Do I Need to File: Age Selection

IRS File Friend

What was your age at the end of 2016?

▼

Drop-down menu
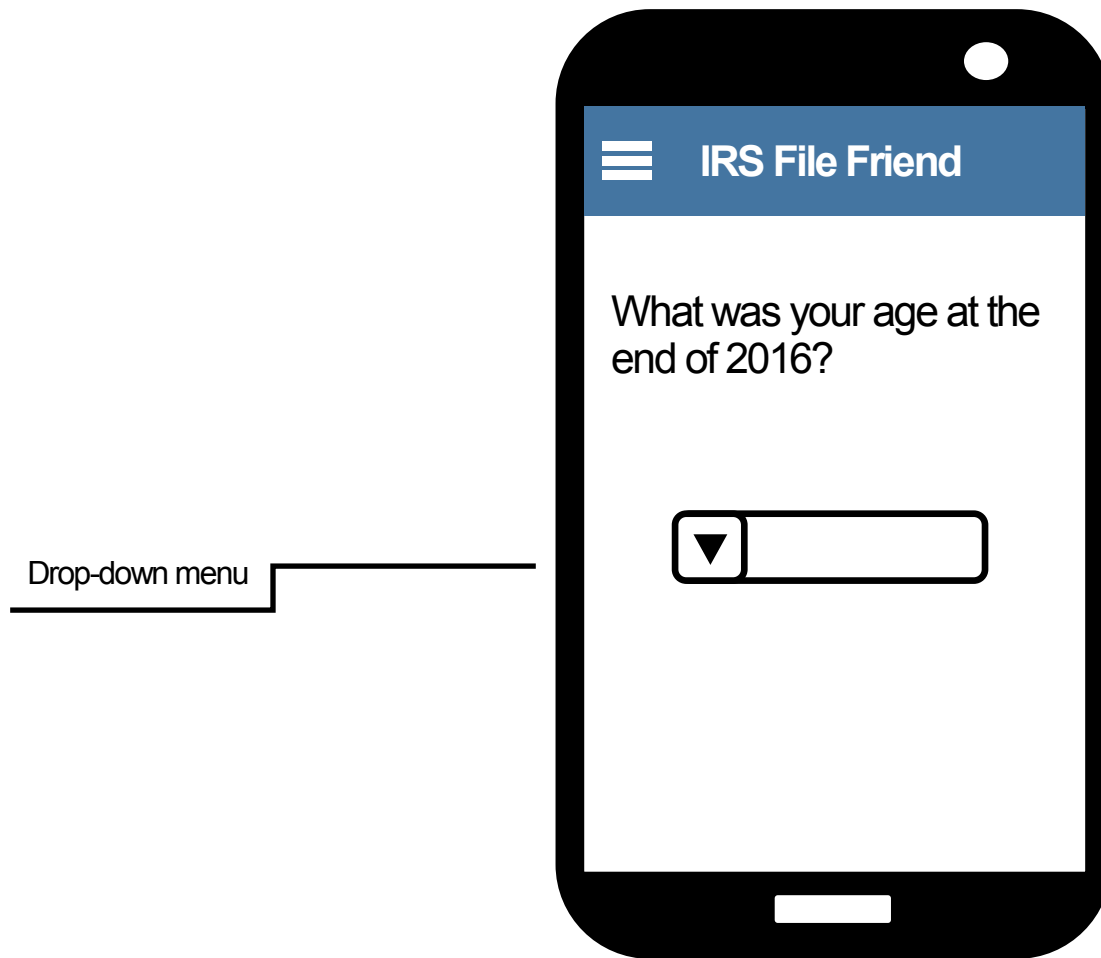
Do I Need to File: Income Selection

IRS File Friend

What was your income at the end of 2016?

$ ————————

Direct-entry
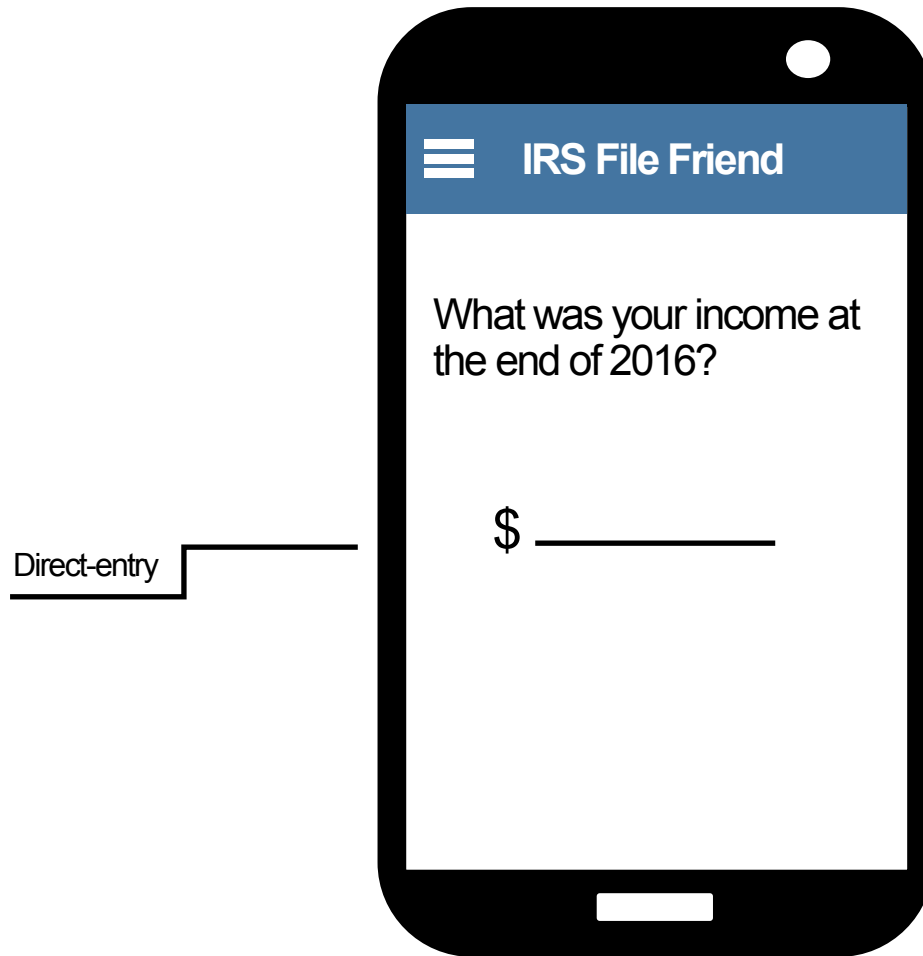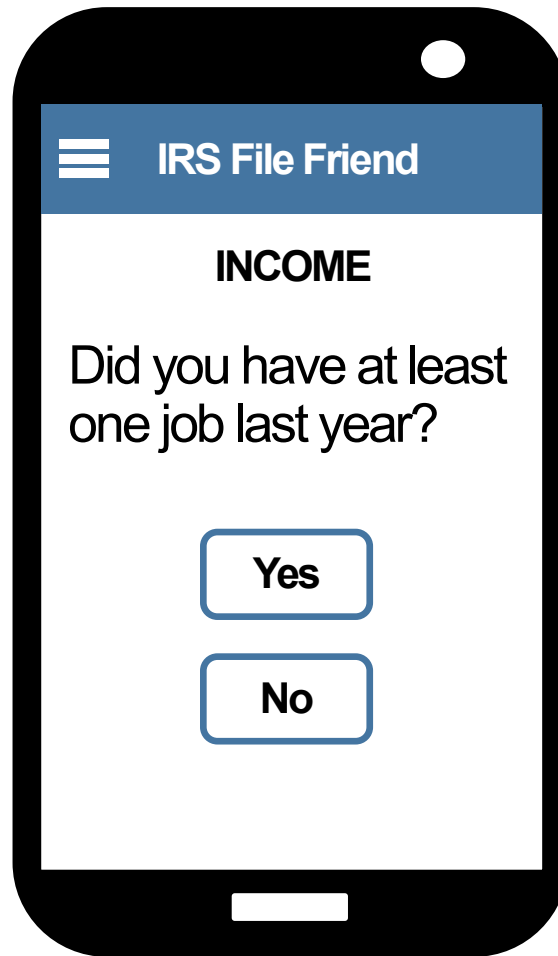
Do I Need to File: Sample Results

☰ IRS File Friend

Based on your answers, you do not need to file a tax return for Tax Year 2016

However, you may still be eligible for tax credits and a refund of your withholding.

Answer a few more questions to find out if you qualify for tax credits.

MENU   **NEXT**
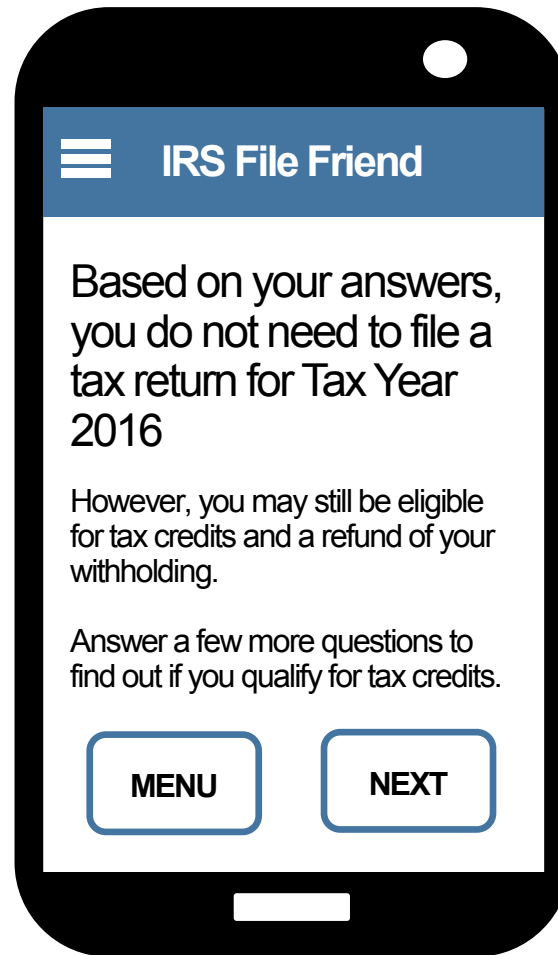
Get Ready to File: Which Documents Will I Need?

IRS File Friend

Which Documents Will I Need?

Documents required to complete your tax return depend on your sources of income, expenses, and unique tax situation.

Tell us about your year to find out which tax documents you'll need.

GET STARTED
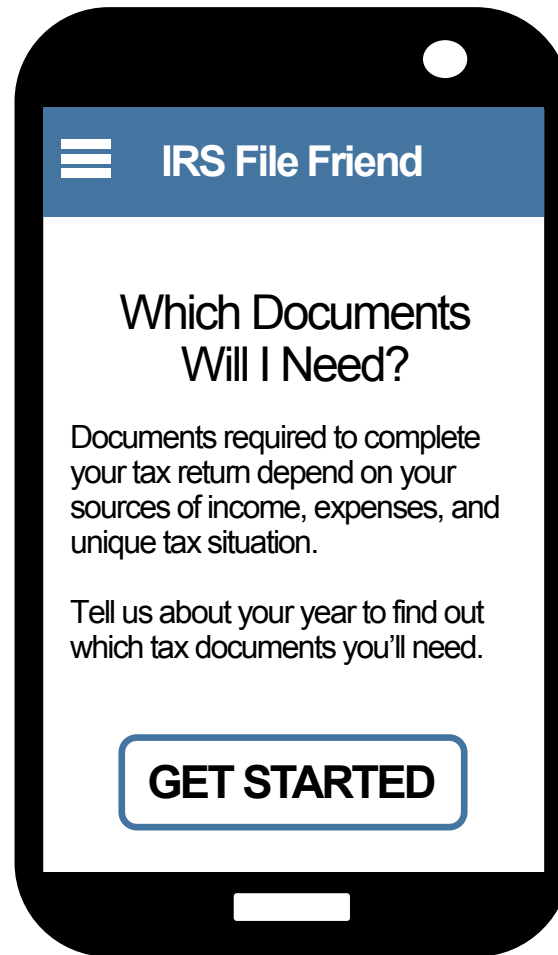
Which Documents Will I Need: Sample Question

IRS File Friend

INCOME

Did you have at least one job last year?

Yes

No

Which Documents Will I Need: Sample Review Page

IRS File Friend

Review your sources of income.

Jobs	✓
Scholarships	✓
Self-employment	✓
Retirement	✓

EDIT   NEXT

Which Documents Will I Need: Sample Results Page

IRS File Friend

Based on your answers, these are the documents you'll need to report your income.

Jobs	W-2	WHAT'S THIS?
Scholarships	1098-T	WHAT'S THIS?
Self-employment	1099-MISC	WHAT'S THIS?
Pension	1099-R	WHAT'S THIS?

NEXT: EXPENSES

Get Ready to File: Am I Eligible for Tax Credits?

IRS File Friend

Am I Eligible for Tax Credits?

Eligibility for Tax Credits depends on a number of factors, including your age, income, filing status, household size, expenses, etc.

Tell us about your year to find out if you may be eligible for tax credits.

GET STARTED
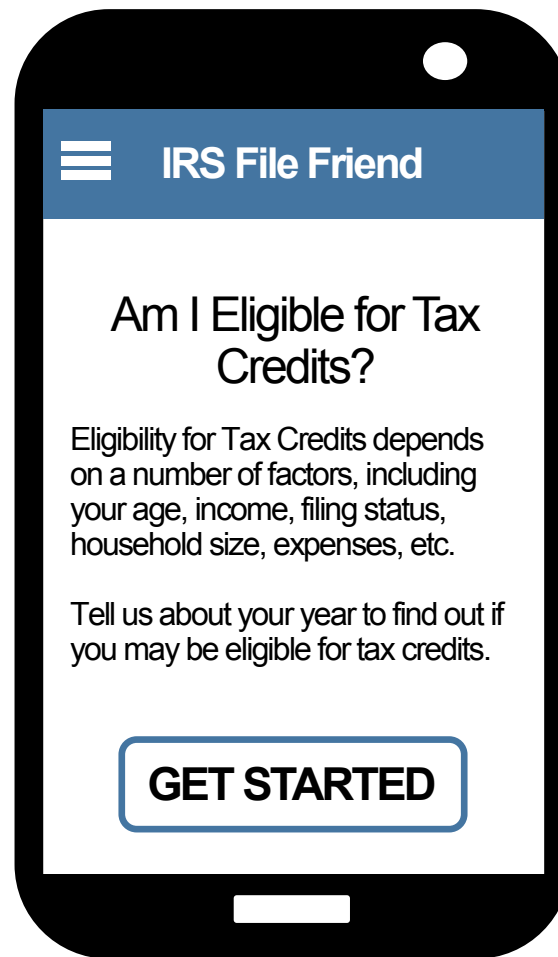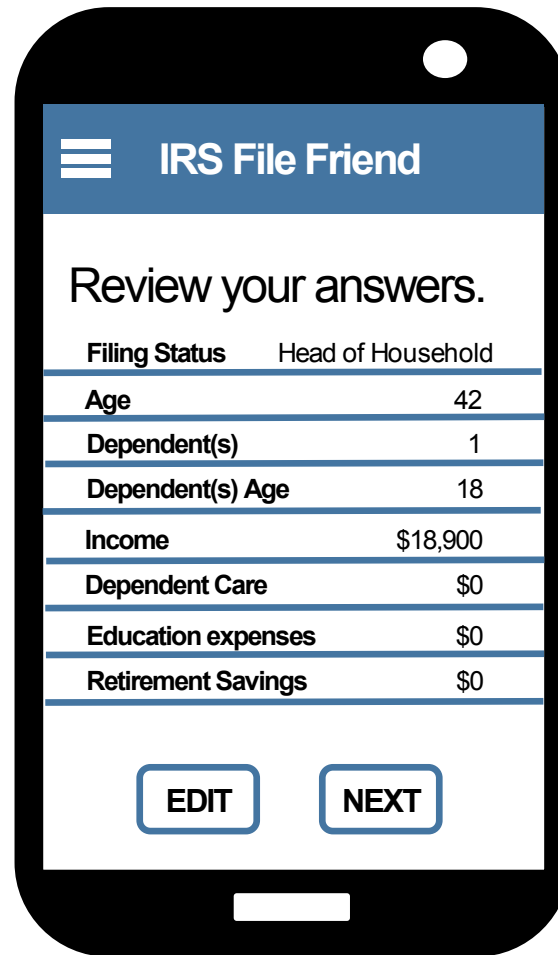
Am I Eligible for Tax Credits: Sample Question

IRS File Friend

Did you make contributions to a retirement account in 2016?

Yes

No
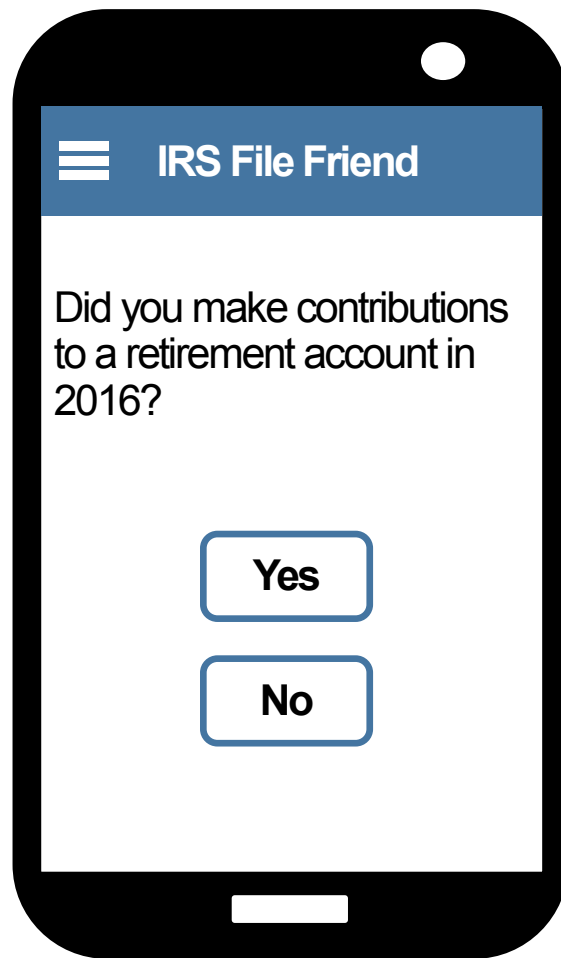
User is only presented with questions that have not been asked in previous sections

Am I Eligible for Tax Credits: Sample Answer Summary

IRS File Friend

Review your answers.

Filing Status	Head of Household
Age	42
Dependent(s)	1
Dependent(s) Age	18
Income	$18,900
Dependent Care	$0
Education expenses	$0
Retirement Savings	$0

EDIT   NEXT

When available, answers auto-populate from entries in previous sections

Am I Eligible for Tax Credits: Sample Results Page

Warnings about future credit ineligibility helps user plan ahead

IRS File Friend

Based on your answers, you may be eligible for these tax credits.

Earned Income Tax Credit ✓   WHAT'S THIS?

Child Tax Credit ✓   WHAT'S THIS?

Credits in red are those that may change significantly in the near future. Tap "what's this" to learn more.

MENU   NEXT

Am I Eligible for Tax Credits: "What's This?" Sample

Earned Income Tax Credit

Your dependent will age out of the Earned Income Tax Credit (EITC) once he or she turns 19, unless he or she is a full-time student.

You may still be eligible for EITC without an eligible dependent, but the amount you receive may decrease.

IRS File Friend

MENU   NEXT
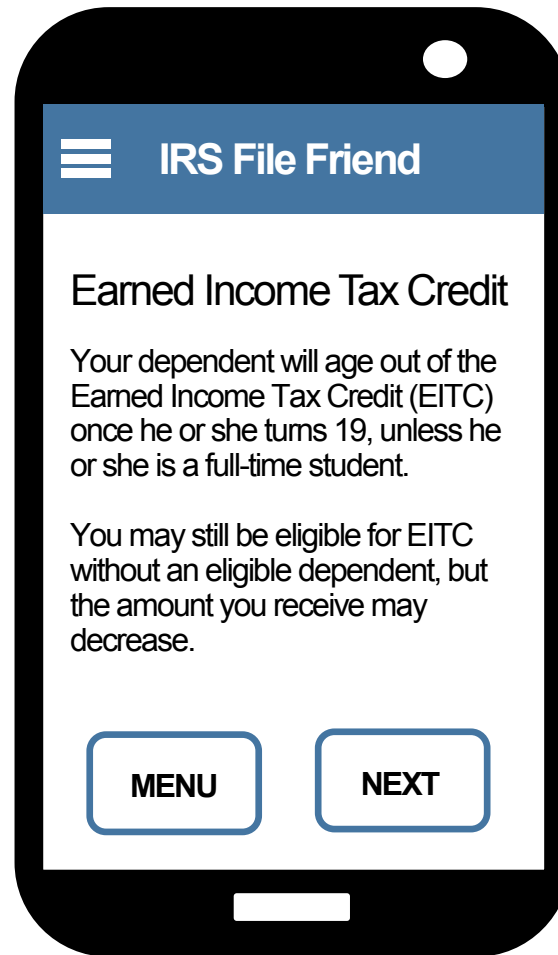
Get Ready to File: Do I Owe an ACA Penalty?

IRS File Friend

Do I Owe an ACA Penalty?

You may owe a penalty if you, or your dependent(s), did not have health care coverage for part or all of the year and are not eligible for an exemption.

We know your income and number of dependents — answer a few more questions to determine whether you will need to pay a penalty.

GET STARTED
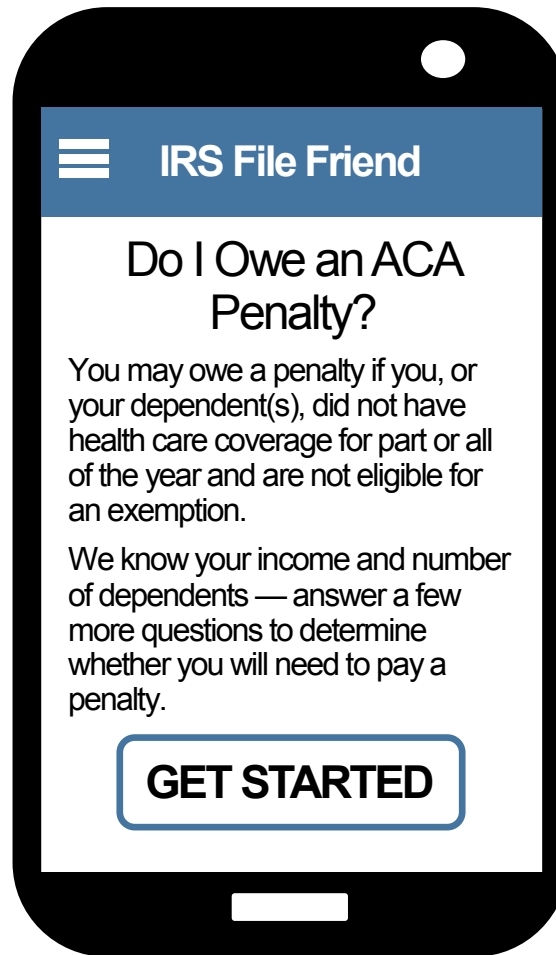
Do I Owe An ACA Penalty: Sample Question

IRS File Friend

Are you, or anyone in your household, a member of a federally-recognized Indian Tribe?

Yes

No
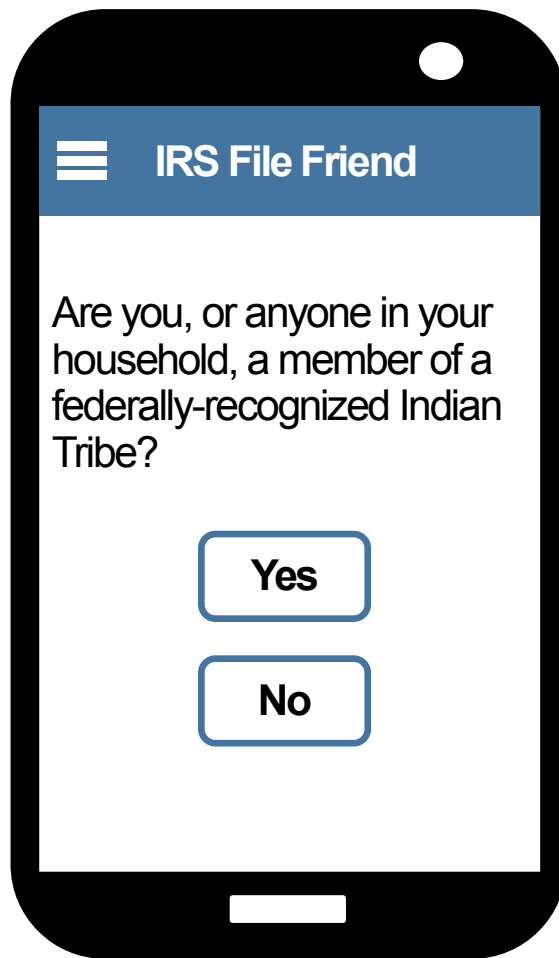
Do I Owe an ACA Penalty: Sample Results

IRS File Friend

Based on your answers, you may qualify for an exemption from the penalty.

Since members of your household were insured for 10 months in 2016, you qualify for the Short Coverage Gap exemption, which can be claimed directly on your tax return.

MENU   NEXT

Get Ready to File: Am I Eligible for Benefits?

IRS File Friend

Am I Eligible for Benefits?

Public benefits do not play a part in tax filing, but the information you provide during the filing process can be used to determine your eligibility.

We've determined your eligibility for a limited selection of public benefits based on the answers you've already provided.

NEXT

Am I Eligible for Benefits: Sample Results Page

IRS File Friend

You may be eligible for these public benefits.

Medicaid	✓	WHAT'S THIS?
SNAP	✓	WHAT'S THIS?
TANF	✓	WHAT'S THIS?

MENU   NEXT
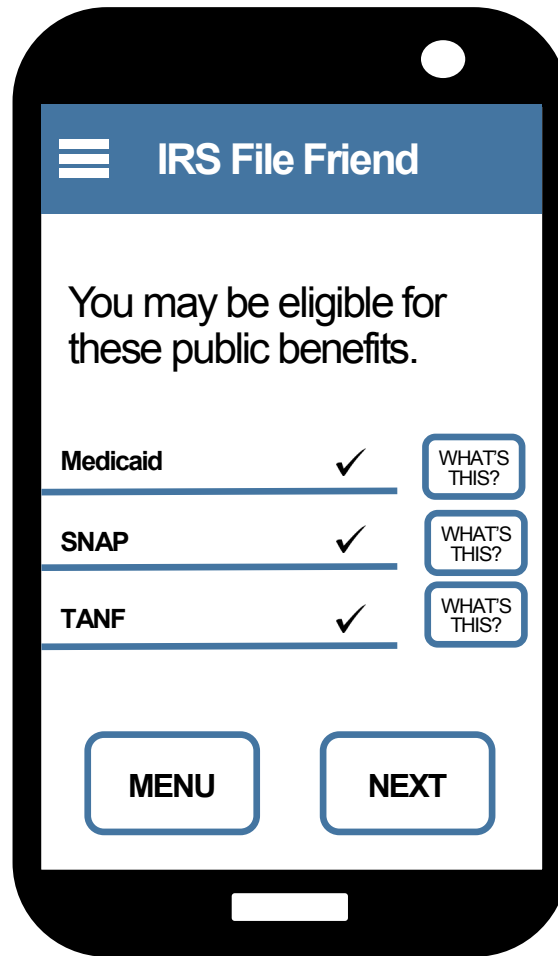
Get Ready to File: I'm Ready to File!

IRS File Friend

I'm Ready to File!

Based on your income, you are eligible for free tax preparation through the Volunteer Income Tax Assistance (VITA) program or free tax preparation software through the Free File Alliance.

Look for VITA locations near you, or connect to Free File software.

GET STARTED

IRS File Friend

What is your zip code?

_____
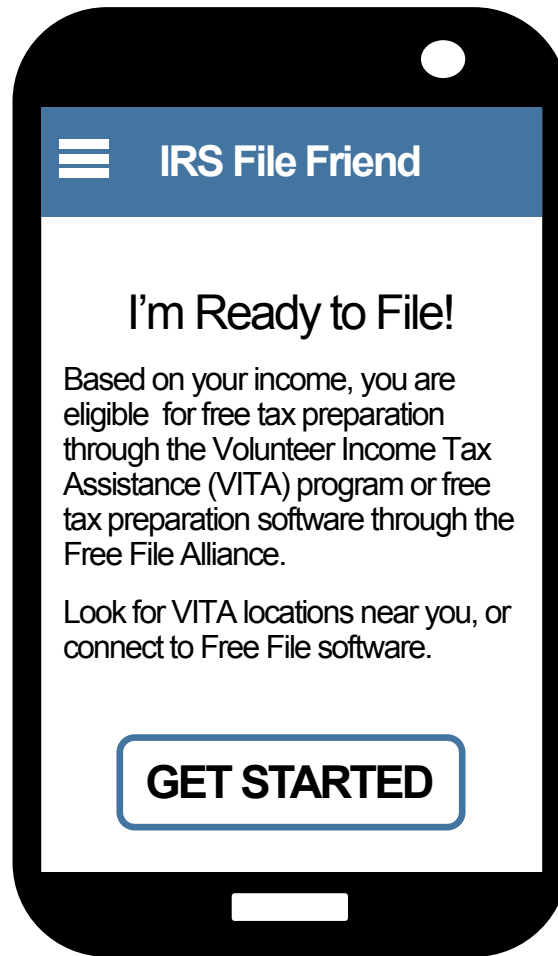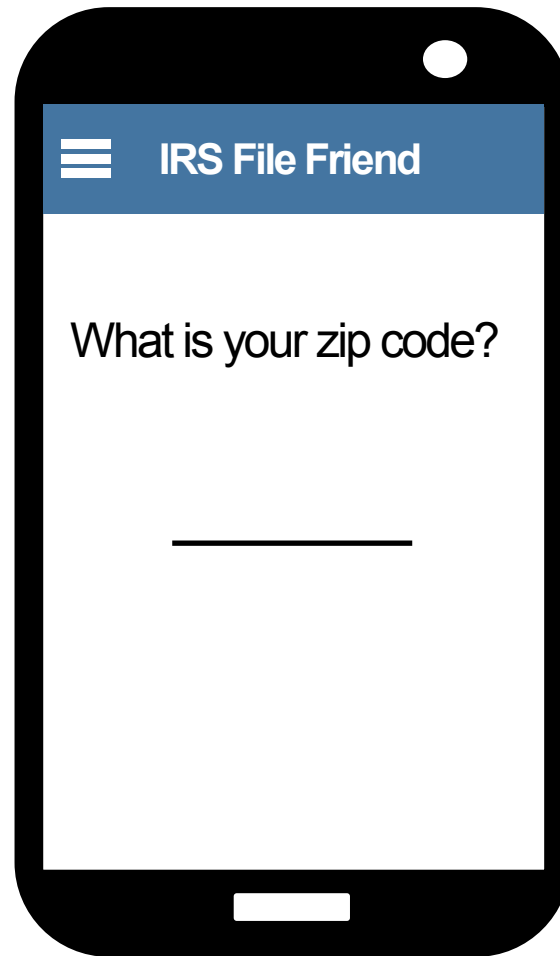
I'm Ready to File: Sample Results

IRS File Friend

These are the VITA sites near you.

① 1510 E Grant Road, Tucson, AZ 85719

② 101 W Irvington Rd, Tucson, AZ 85714

③ 1660 W Ruthrauff Rd, Tucson, AZ 85705

④ 1680 E Valencia Rd, Tucson, AZ 85746

Why IRS File Friend?

Accessibility

In a 2015 report on U.S. smartphone use, the Pew Research Center found that 64% of American adults own a smartphone, and that one-in-five has limited options to get online other than a smartphone. According to the report, this is especially true for "those with relatively low income and educational attainment levels, younger adults, and non-whites" (Smith).

Unlike a mobile-friendly web application, a native app would allow for some features to be made available to users offline.

Audience

According to a 2014 U.S. Mobile App Report, over a third of U.S. smartphone owners download at least one new app every month (Dwyer). Though apps are used by a wide range of smartphone owners, they appeal especially to a younger audience — including those who have never filed a tax return — and can serve as a positive, introductory tool to taxpayer responsibilities and information. The "taxpayer experience of the future" must adapt to, and take advantage of, technological trends to be effective in the long term.

Perception

For those for whom "taxes" is synonymous with "hassle," making access to their tax information as convenient as possible, and organizing, simplifying, and explaining that information, may change their perception of the entire filing process. IRS File Friend does just that.

Citations

Dwyer, Kate. "Over a Third of U.S. Smartphone Owners Download At Least One App Per Month." comScore, Inc., 2 Sept. 2014. 8 May 2016.

Smith, Aaron. "U.S. Smartphone Use in 2015." Pew Research Center, 5 Apr. 2015. 8 May 2016.

Basic Workflow Sample

Introductory Page

Registration/Log-In Page

Main Menu

View Prior Year Information

Get Ready to File

Choose Tax Year

Personal Information	Filing Status	Dependent Information	Income	Deductions	Taxes & Credits	Download as PDF
View Personal Information	View Filing Status / Tell Me More (TMM)	View Dependents / TMM	View Income / TMM	View Deductions / TMM	View Taxes & Credits / TMM	Download button

What's My Filing Status?	Do I Need to File?	Which Documents Will I Need?	Am I Eligible for Tax Credits?	Do I Owe an ACA Penalty?	Am I Eligible for Benefits
Review last year's status	Enter taxpayer/spouse age	Determine sources of income	Determine eligibility for refundable credits	Determine length of coverage	View results
Enter current information	Enter income	Determine expenses	Determine eligibility for non-refundable credits	Determine exemption eligibility	Link to external pages in browser or continue to "I'm Ready to File"
View results	View results	Determine other adjustments to income	View results	View Results	
Continue to "Do I Need to File"	Continue to "Which Documents"	Determine other life events, etc. (Ex: HSA)	Continue to "Do I Owe an ACA Penalty"	Continue to " Am I Eligible for Benefits"	
		View Results			
		Continue to "Am I Eligible for Tax Credits			

I'm Ready to File

Enter location

View Results

Back to "Get Ready to File" menu