

IRS Tax Design Challenge

IRS File Friend

A native app for iOS and Android smartphones

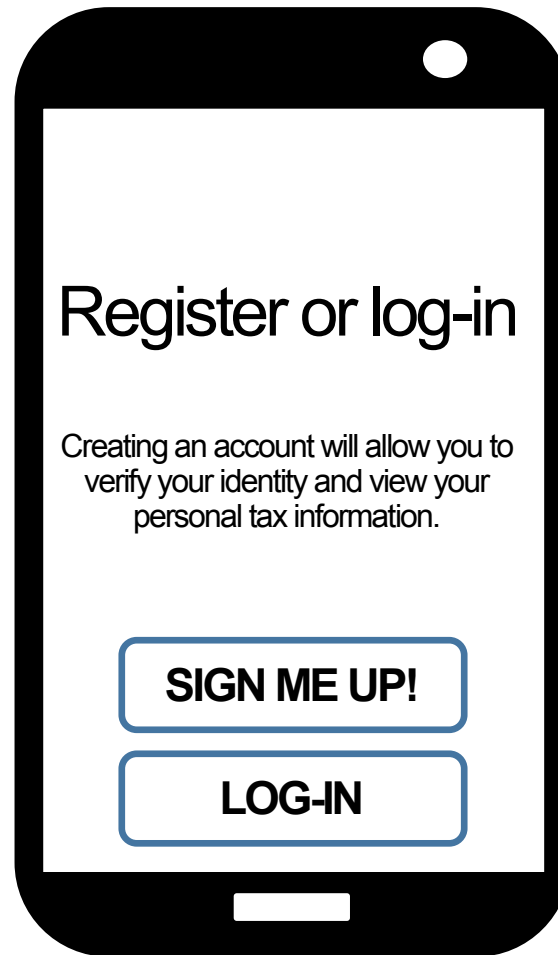
Introductory Page



Can be integrated into IRS2Go mobile app

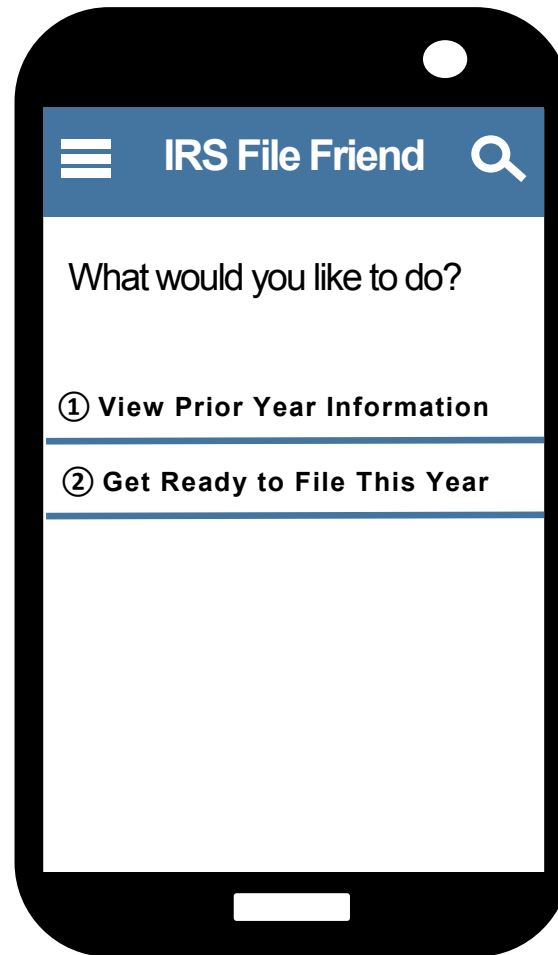
Workflow allows for possibility of HTML5 mobile web application or desktop webpage formatting

Registration & Log-In Page



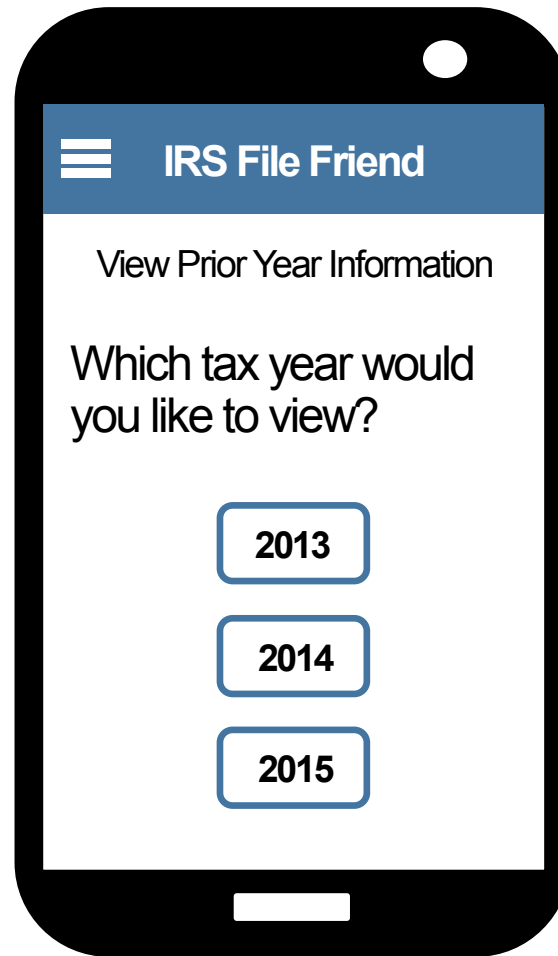
Log-in is required each time app is launched, for added security

Main Menu



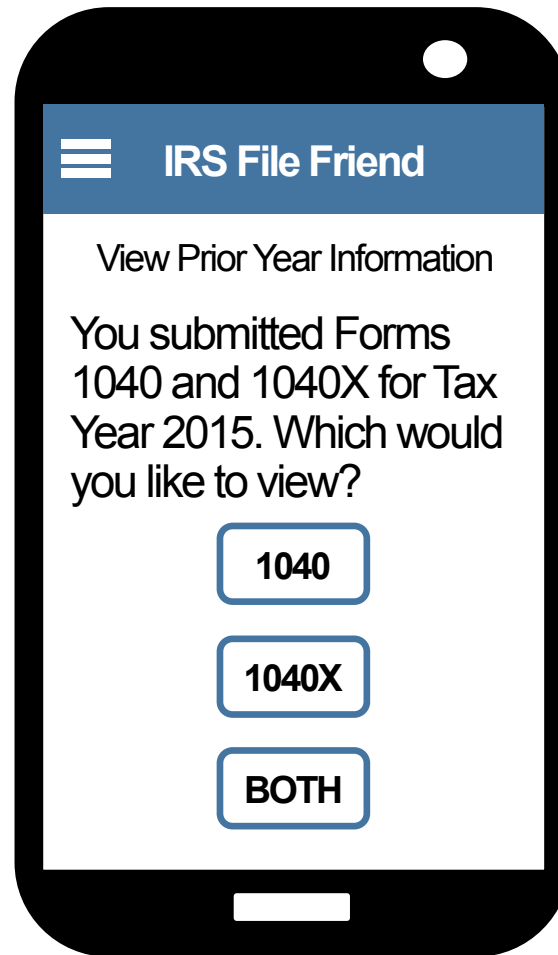
[View Prior Year Information](#)

Prior Year Information: Tax Year Selection



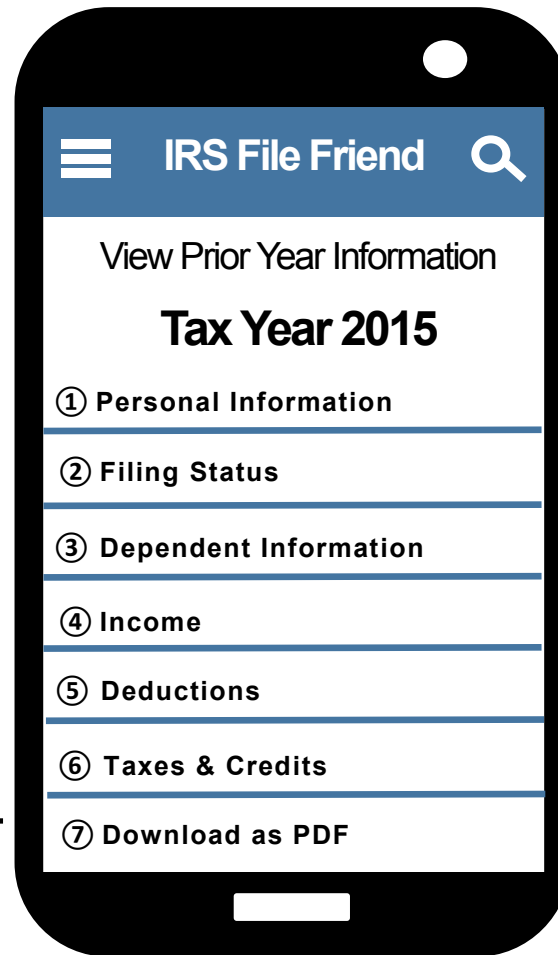
App utilizes phone's built-in back button

Prior Year Information: Tax Year Selection



Large, mobile-friendly buttons for quick navigation

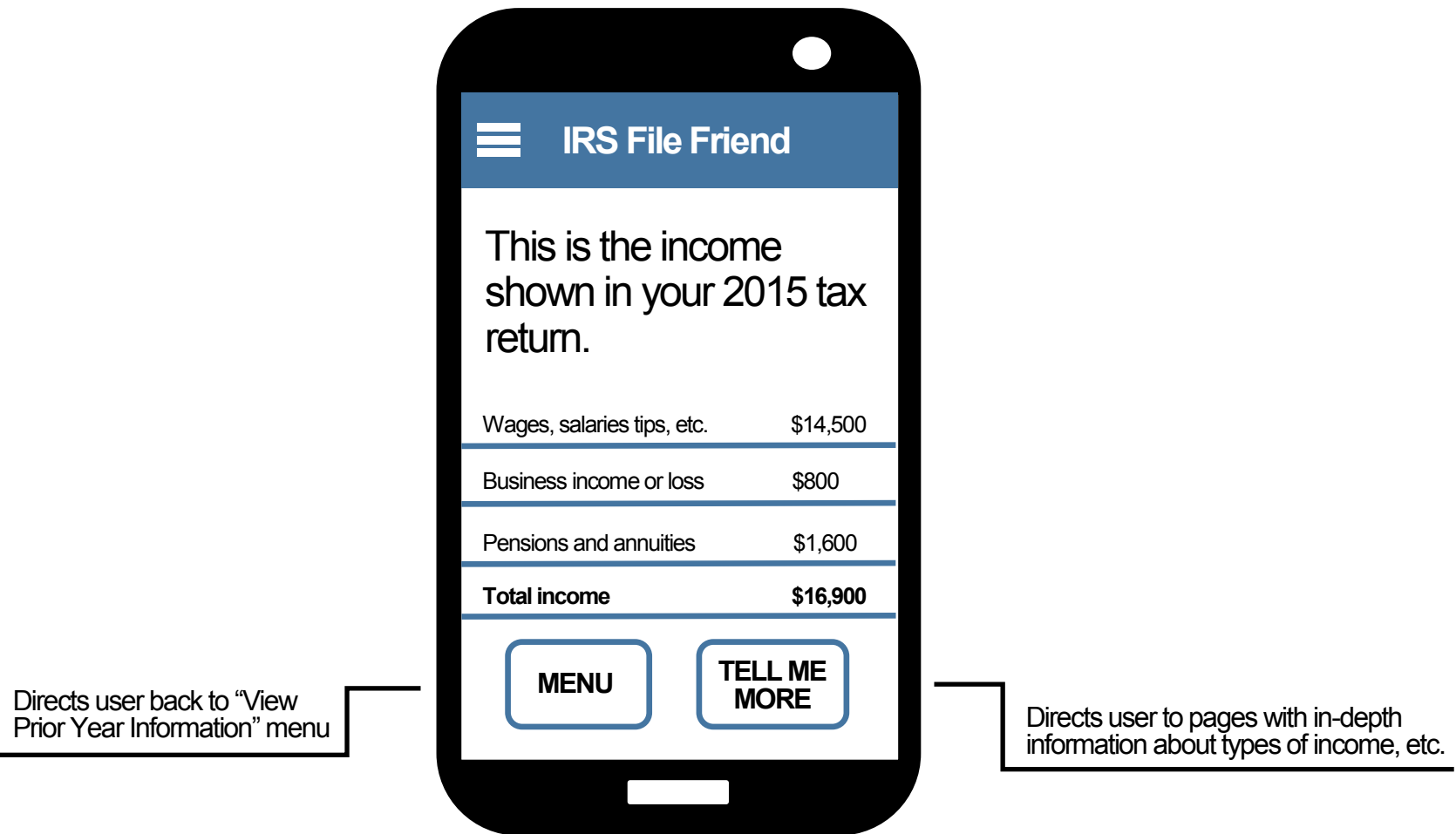
Prior Year Information: Tax Year Menu Page



Broad introductory categories for ease of use

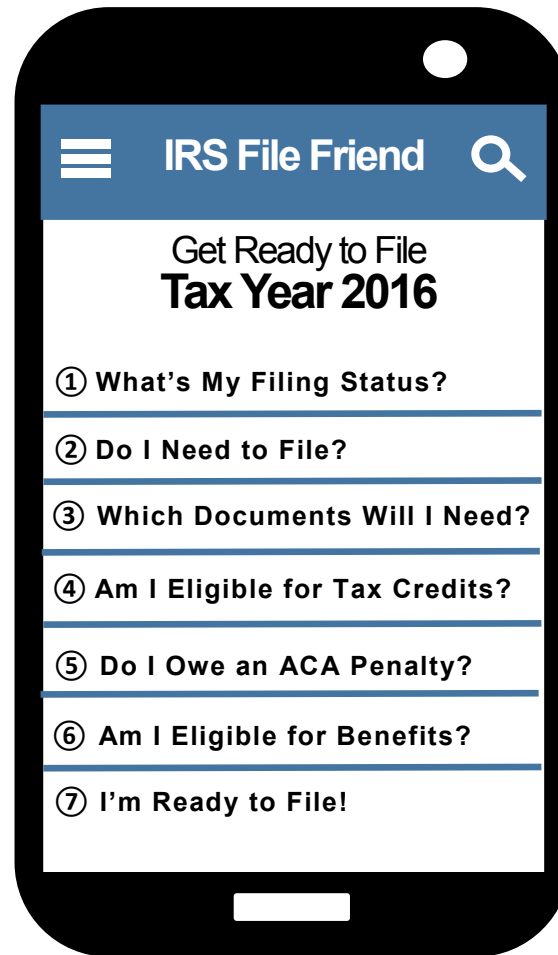
User can choose to view individual categories in app or entire report as PDF

View Prior Year Information: Income Sample

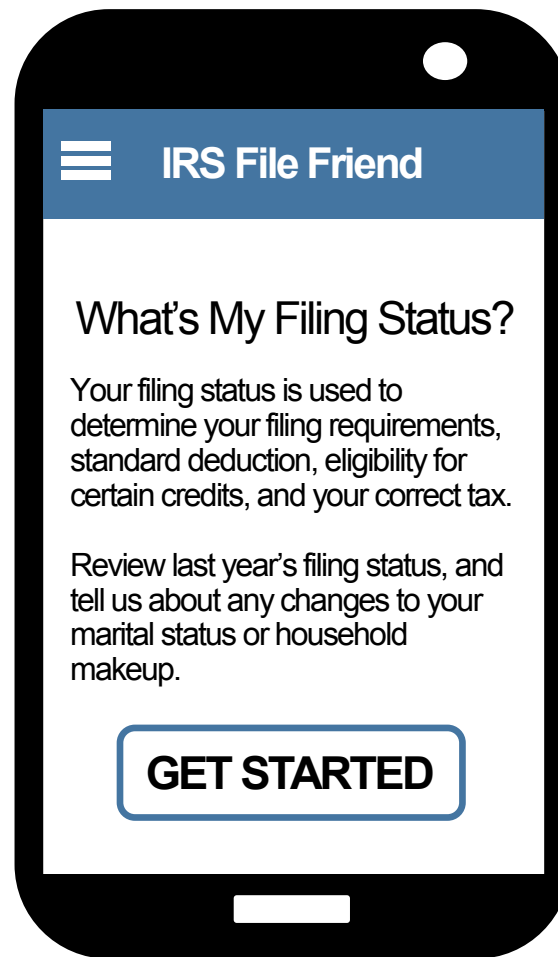


Get Ready to File

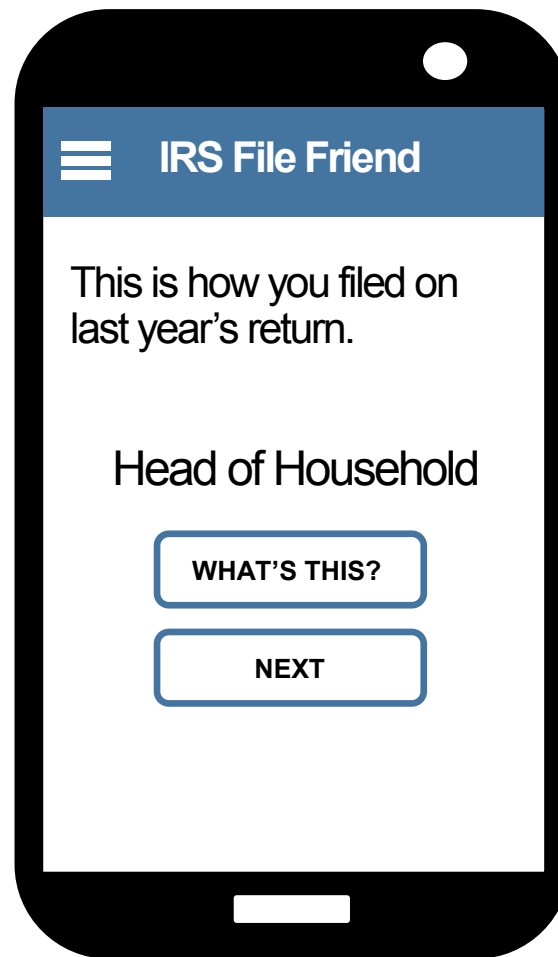
Get Ready to File: Menu Page



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



What's My Filing Status: Sample Review



What's My Filing Status: Sample Question

IRS File Friend

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

SINGLE OR LEGALLY SEPARATED

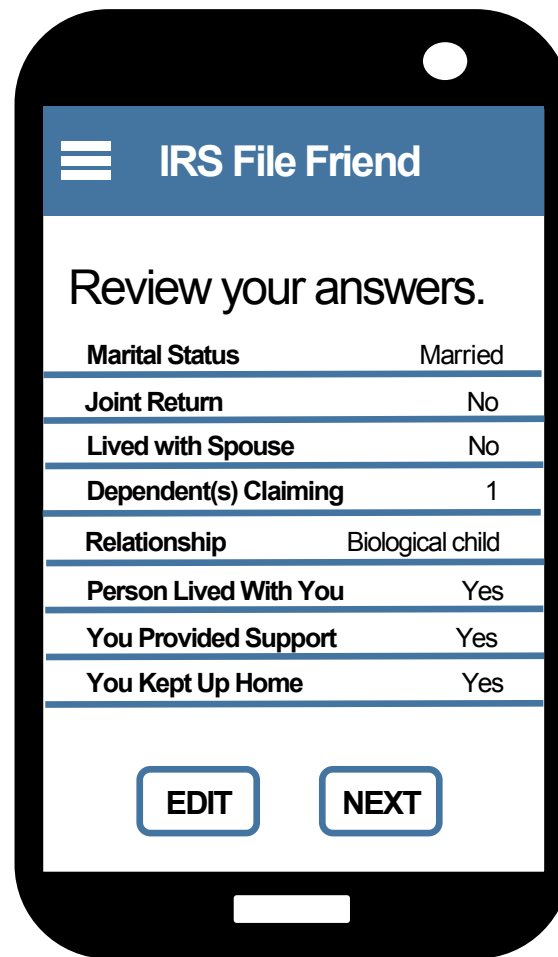
MARRIED

WIDOWED DURING TAX YEAR

WIDOWED BEFORE TAX YEAR

Includes information found on [irs.gov](https://www.irs.gov) in a simplified, mobile-friendly format

What's My Filing Status: Sample Answer Summary

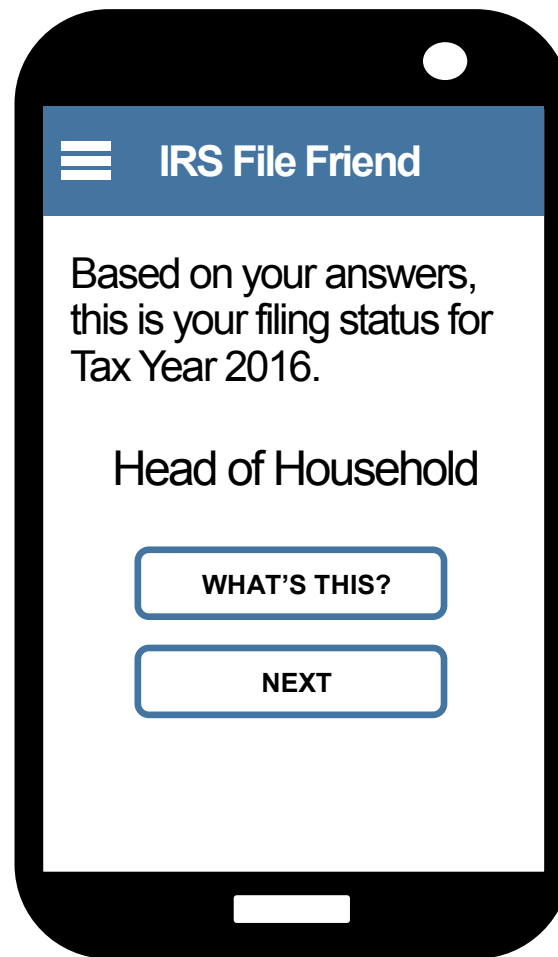


The image shows a smartphone screen with the 'IRS File Friend' app. The screen displays a 'Review your answers.' section with a list of questions and their corresponding answers. At the bottom of the screen are two buttons: 'EDIT' and 'NEXT'.

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

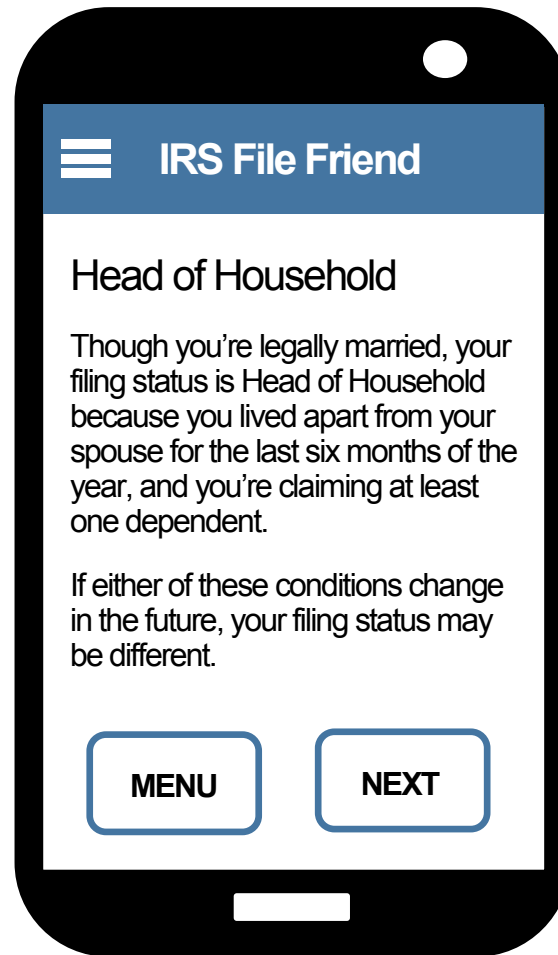
EDIT NEXT

What's My Filing Status: Sample Results

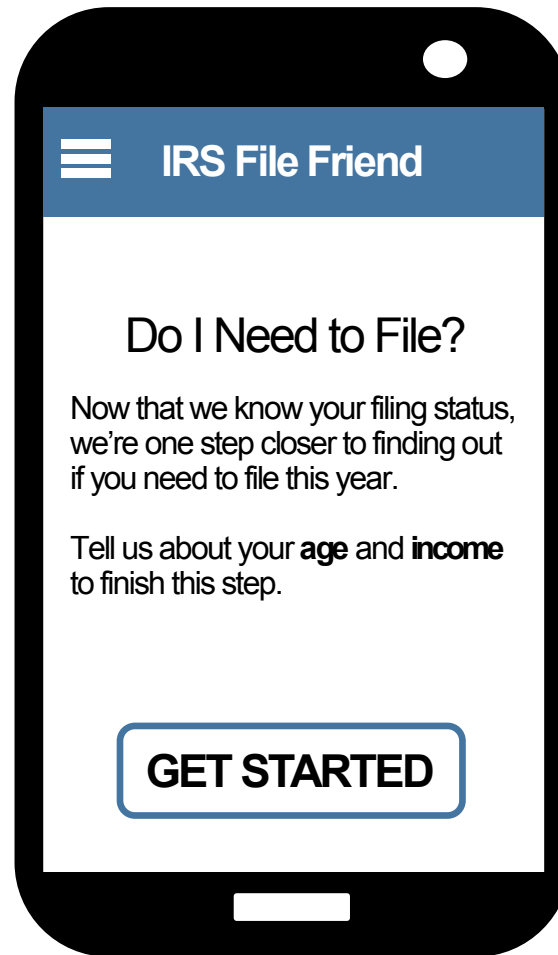


App keeps record of results, for user's future reference and for auto-population in other sections

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



Get Ready to File: Do I Need to File?



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

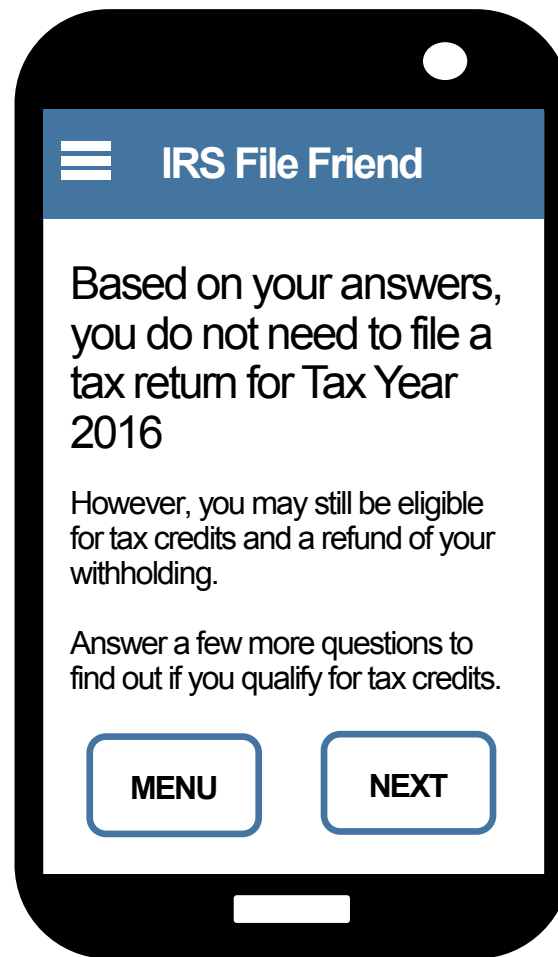
IRS File Friend

What was your income at the end of 2016?

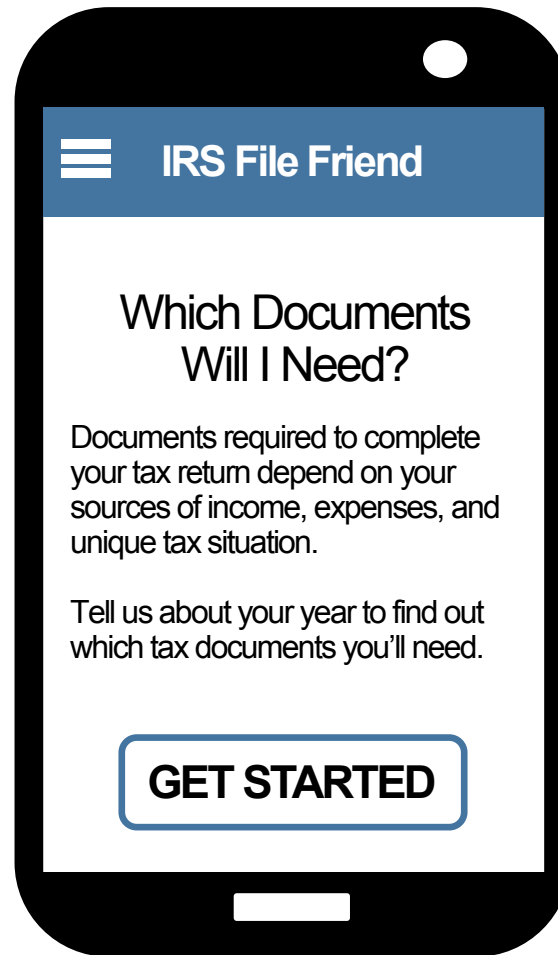
\$ _____

Direct-entry

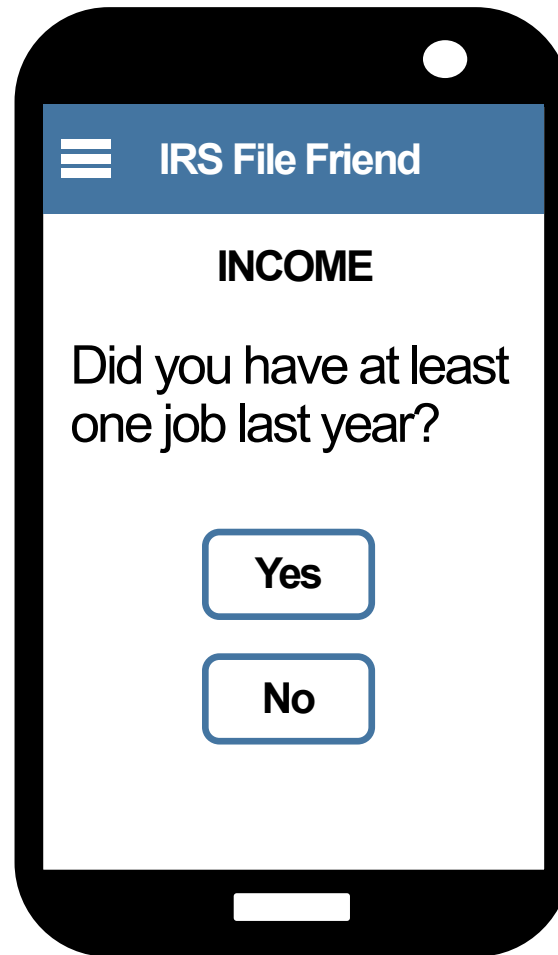
Do I Need to File: Sample Results



Get Ready to File: Which Documents Will I Need?



Which Documents Will I Need: Sample Question



IRS File Friend

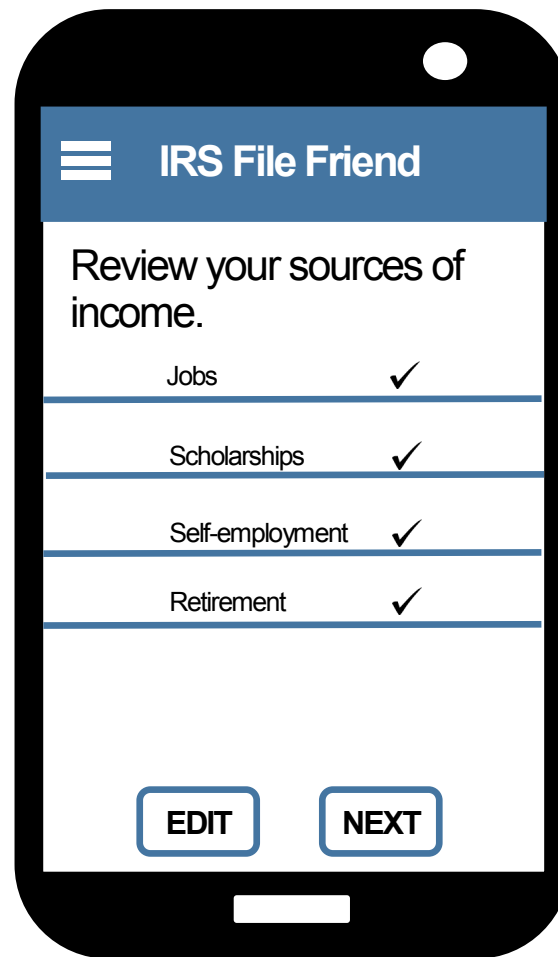
INCOME

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

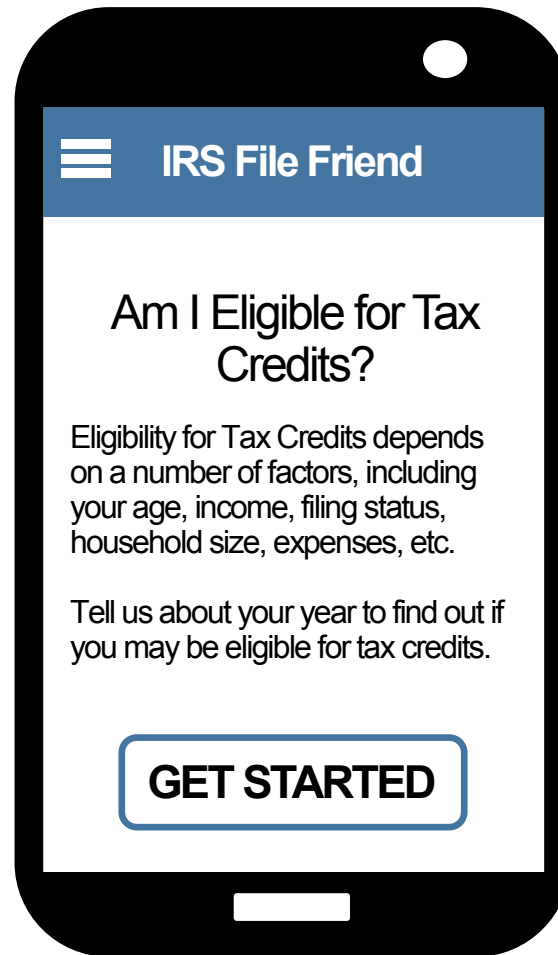
IRS File Friend

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

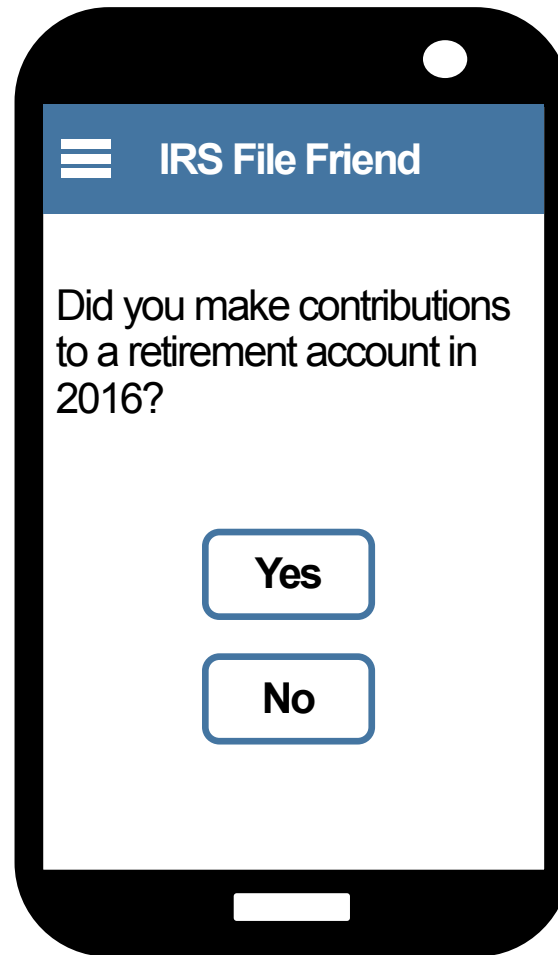
Jobs	W-2	WHAT'S THIS?
Scholarships	1098-T	WHAT'S THIS?
Self-employment	1099-MISC	WHAT'S THIS?
Pension	1099-R	WHAT'S THIS?

NEXT: EXPENSES

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



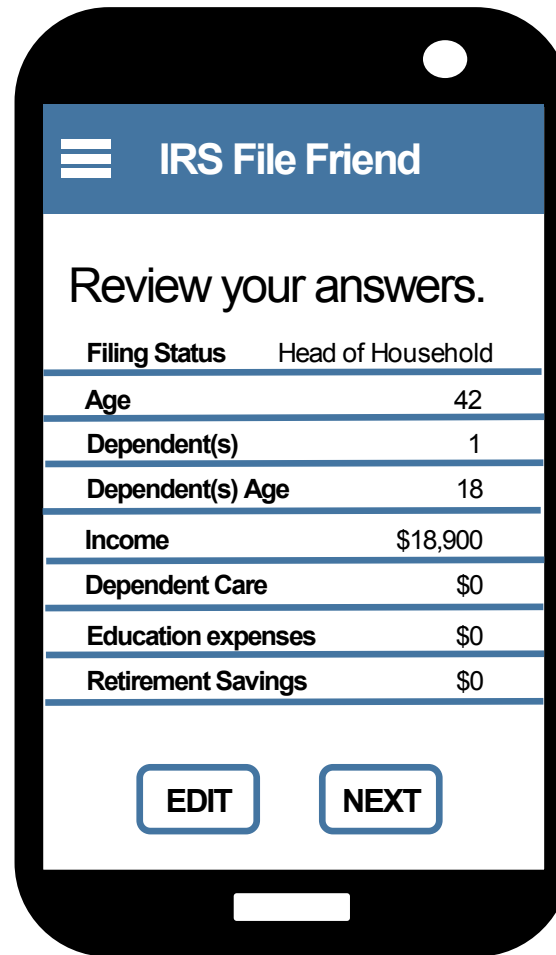
Am I Eligible for Tax Credits: Sample Question



The image shows a black smartphone with a white screen. At the top of the screen is a blue header bar with a white hamburger menu icon on the left and the text 'IRS File Friend' in white. Below the header, the screen is white and contains the text 'Did you make contributions to a retirement account in 2016?' in black. Below the text are two rounded rectangular buttons with blue borders. The top button is labeled 'Yes' and the bottom button is labeled 'No'.

User is only presented with questions that have not been asked in previous sections

Am I Eligible for Tax Credits: Sample Answer Summary



The image shows a smartphone screen with the 'IRS File Friend' app. The screen displays a 'Review your answers.' section with a table of tax-related information. The table has two columns: 'Filing Status' and 'Head of Household'. The rows include 'Age', 'Dependent(s)', 'Dependent(s) Age', 'Income', 'Dependent Care', 'Education expenses', and 'Retirement Savings'. At the bottom of the screen are two buttons: 'EDIT' and 'NEXT'.

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

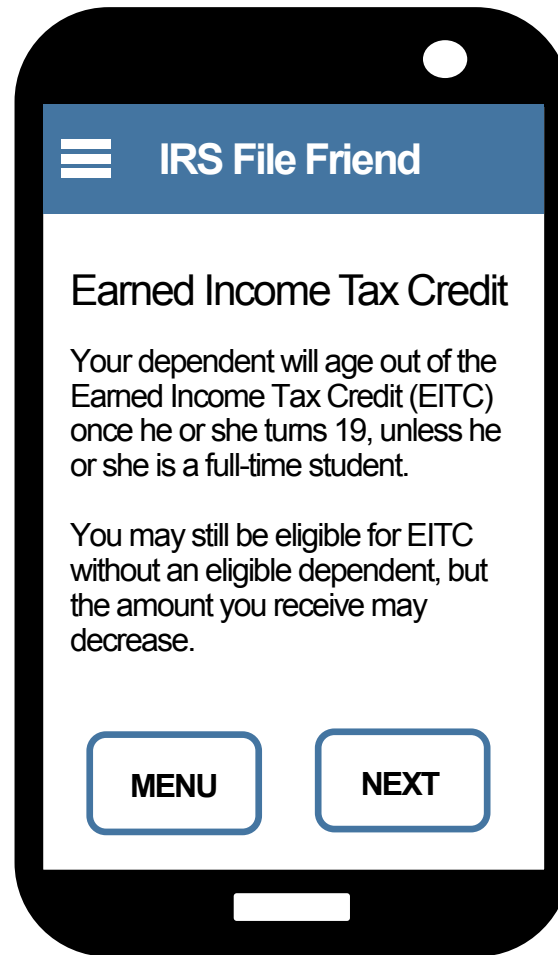
Based on your answers,
you may be eligible for
these tax credits.

Earned Income Tax Credit ✓	WHAT'S THIS?
Child Tax Credit ✓	WHAT'S THIS?

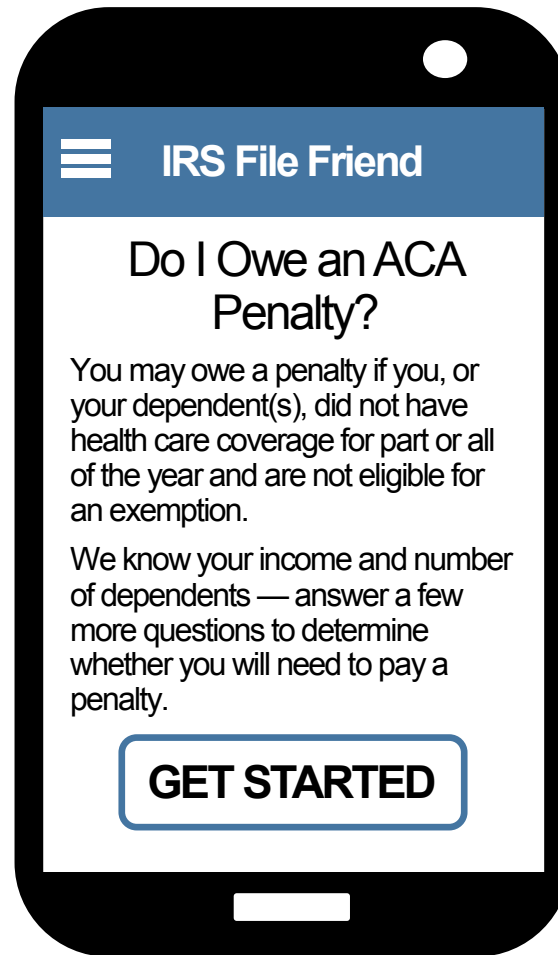
Credits in **red** are those that may change significantly in the near future. Tap "what's this" to learn more.

MENU **NEXT**

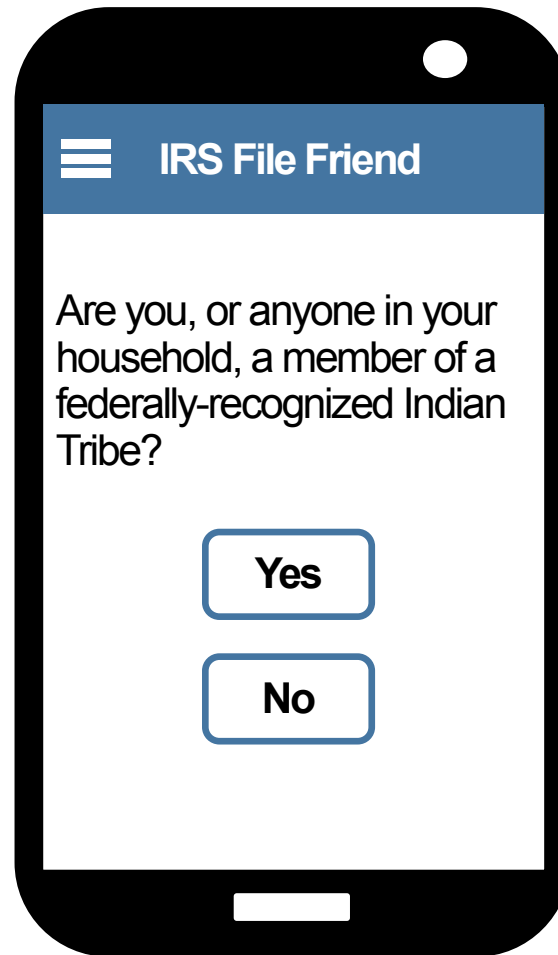
Am I Eligible for Tax Credits: “What’s This?” Sample



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



Do I Owe An ACA Penalty: Sample Question



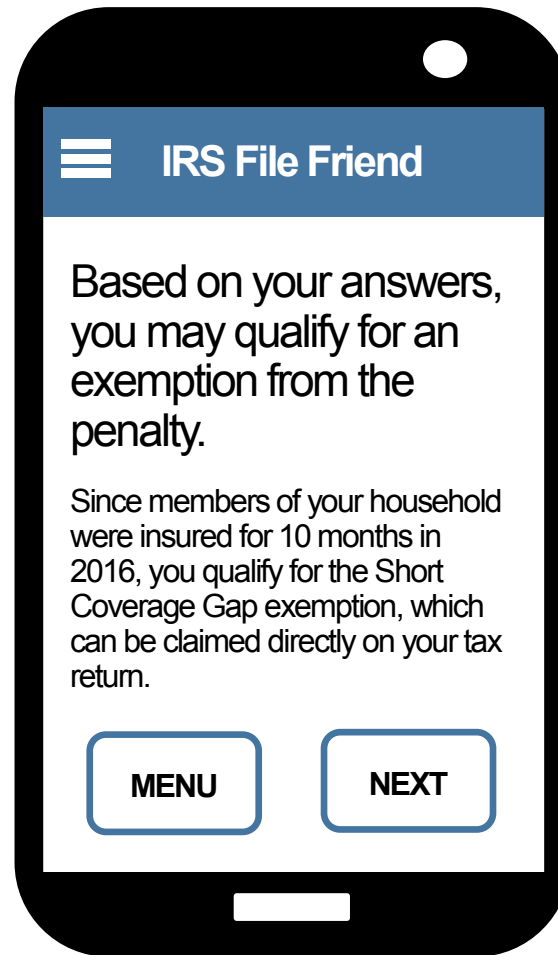
IRS File Friend

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

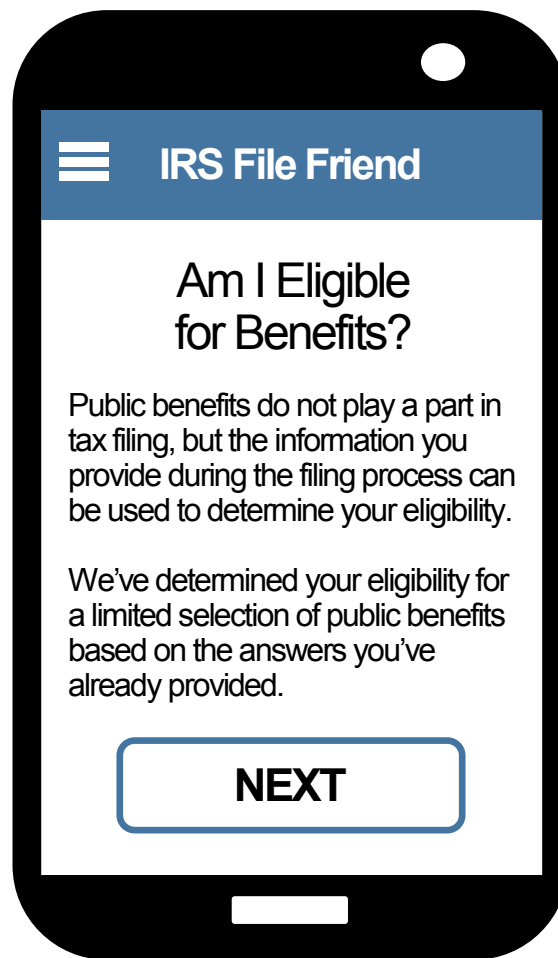
Yes

No

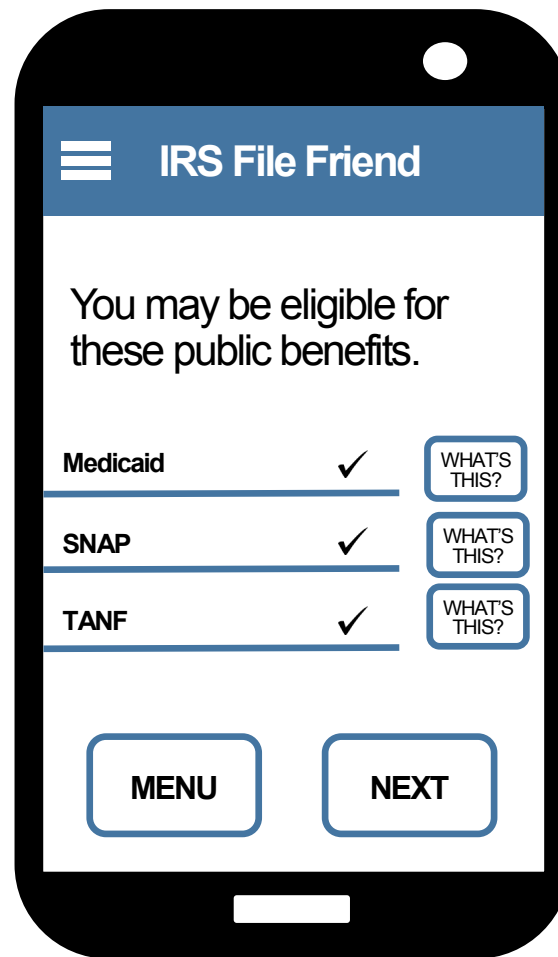
Do I Owe an ACA Penalty: Sample Results



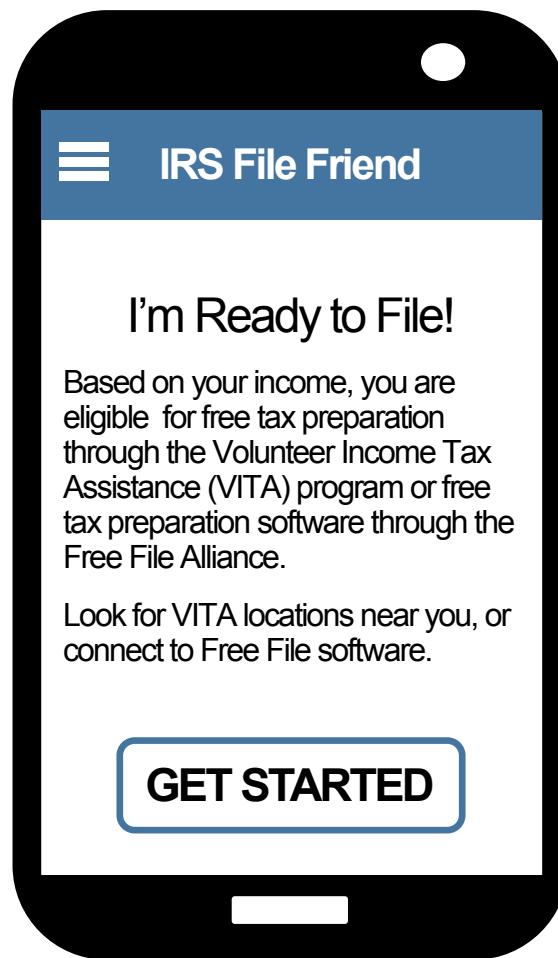
Get Ready to File: Am I Eligible for Benefits?



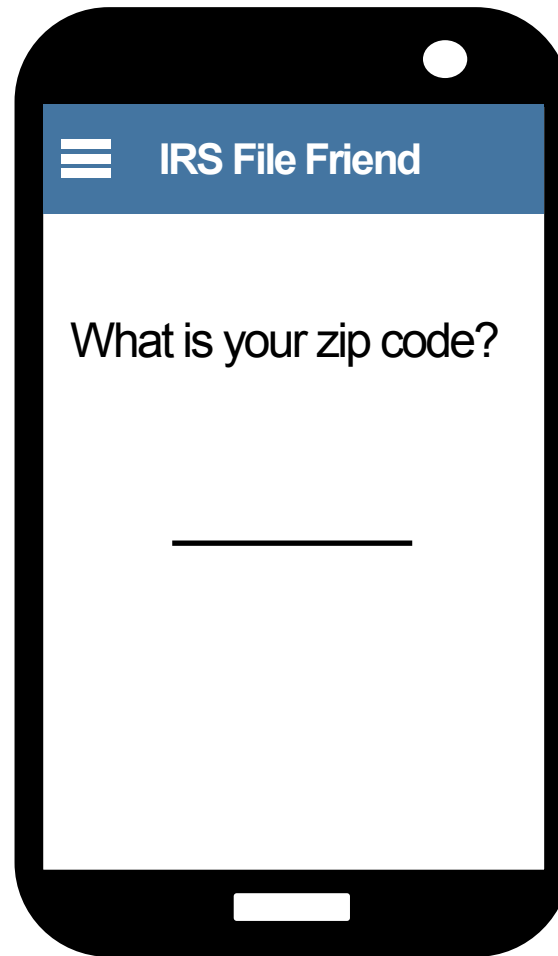
Am I Eligible for Benefits: Sample Results Page



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



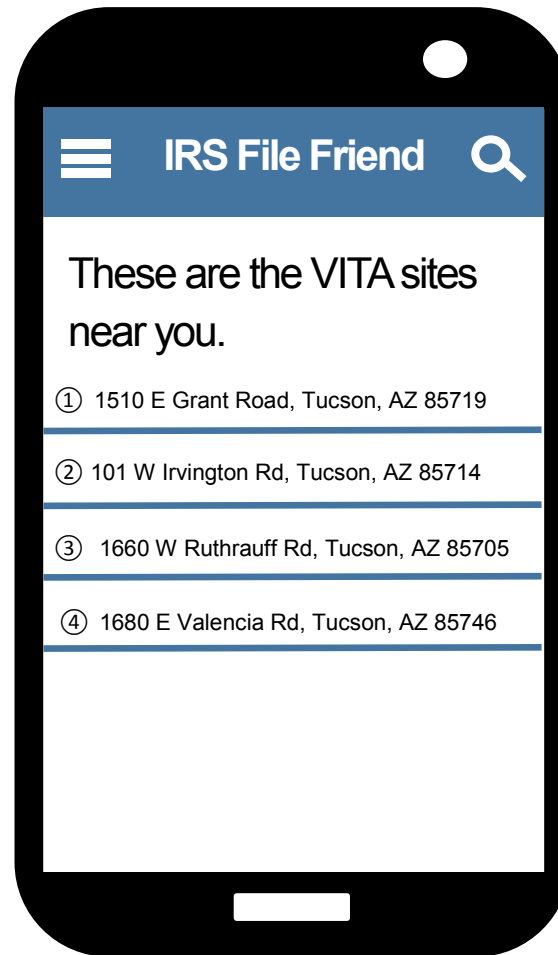
I'm Ready to File: VITA Locator Sample Question



IRS File Friend

What is your zip code?

I'm Ready to File: Sample Results



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

