



IRS
365

TAX CHALLENGE

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THE PROBLEM

*Filing taxes and
accessing tax records
feels daunting,
unpleasant, and
complex*

HOW DOES IT MAKE YOU FEEL?

“The worse part of (paying) taxes is that it brings up a lot of emotional baggage about how you’ve spent your money or how you haven’t organized throughout the year.”

THE IRS HAS A BAD RAP.

The IRS website has an incredible amount of information and many online services, and IRS employees staff help lines to assist taxpayers every day.

Revenue collected by the IRS is responsible for amazing social services, infrastructure, and keeping our democracy running.

Yet nothing in the tax process connects people to the positive side of the IRS.

TAX PREPARATION IS PAINFUL

Taxpayers struggle to understand our tax code- it's complex. Unless you're a tax professional, tax terminology can be baffling.

Tax information and tools are in many different places. A taxpayer might use online tax preparation tools, [irs.gov](https://www.irs.gov), google, mobile apps, spreadsheets, filing systems, the phone and mail to manage their responsibilities.

Many people react to the difficulty of paying taxes by avoiding them. Taxes become a last minute scramble that people only start worrying about as April approaches.

WHAT INFORMATION IS IMPORTANT TO YOU?

"I don't know what I don't know."

*"I don't know which
purchases or activities get
me tax breaks."*



*"I didn't know it
mattered, so I
didn't get a
receipt."*



MISSED OPPORTUNITIES HURT.

People are aware of some credits and deductions, but forget to save receipts or file for them. Sometimes they remember when they're filing taxes, but by then it's too late.

Often opportunities aren't even on people's radars. It's hard to look for information when you don't know something exists.

Eligibility can be hard to determine. People may miss opportunities believing that they're for others, not for them.

HELP IS HARD TO FIND.

People can't find the info they need, when they need it

Information is often organized by the number of a form, not by the words or life events that make sense to people.

When you have a problem, help is hard to access. Emailing the IRS isn't possible, and wait times on phone calls to talk to a human can be hours or days, even weeks.

Understanding taxes should be easy.

LET'S RETHINK OUR TAX DATA SO THAT IT...

Creates Understanding

is comprehensive but not overwhelming
shows most important data at a glance
is easy to find help and education

Feels Human

uses language I get
is organized by my life
is familiar and similar to the tools I use
reminds me why my taxes matter

Surfaces Opportunities

alerts me to effects of new tax changes
prevents missed opportunities
suggests deductions, credits, FAFSA, EITC, etc

Is Easy to Use

is all in one place with one login
makes it easy to share data
is with me on the go/when things happen
helps me a little bit at a time, all year



Meet Eric.

Here's how he uses IRS 365:

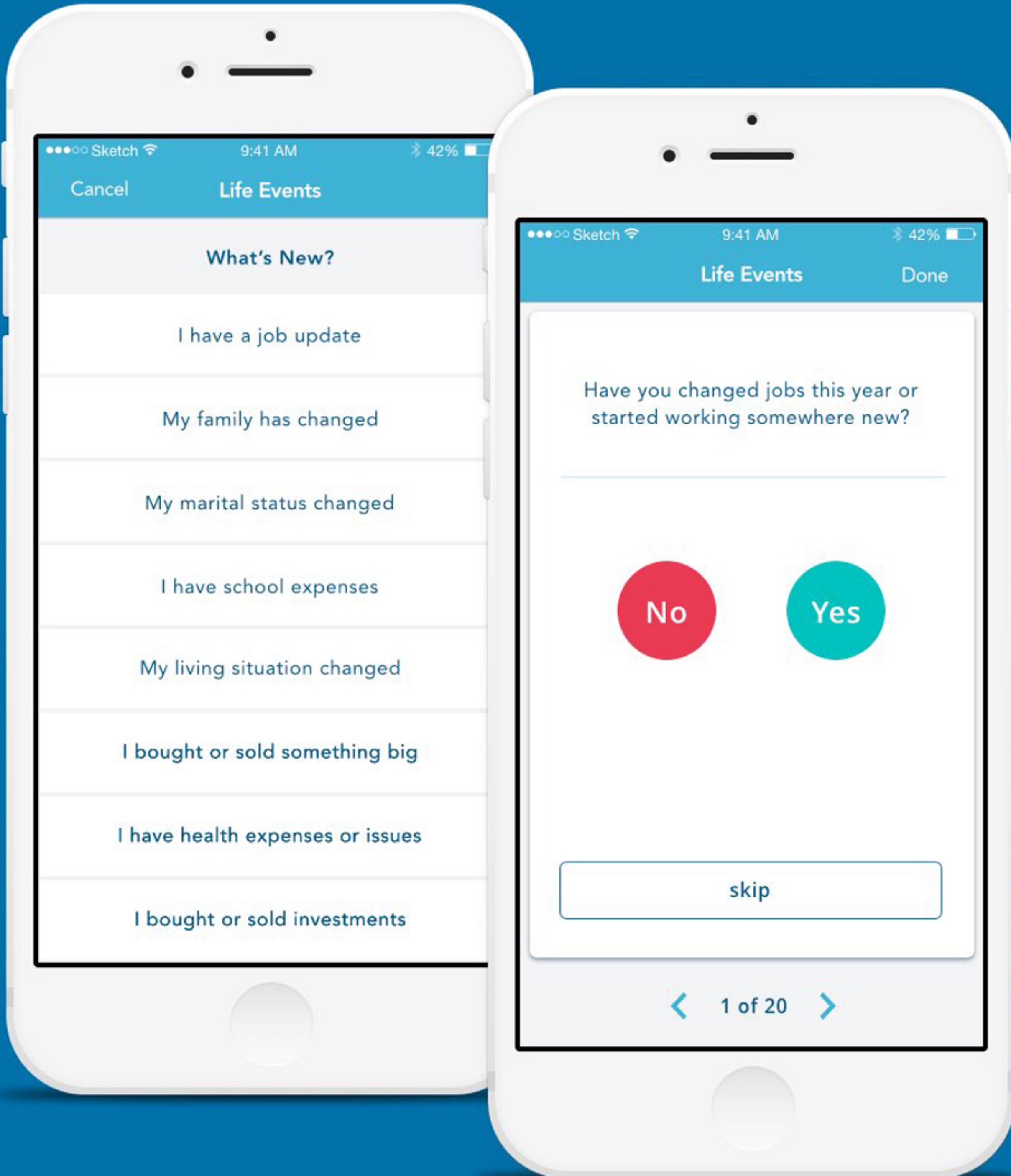
- Eric answers questions about his life events and preferences to build profile during onboarding.
- His answers + his past tax data help surface opportunities.
- It's easy for Eric to see a summary of his tax information and current status- he can drill in for more details.
- Eric can update life events and track receipts throughout the year- making him proactive about his tax info.
- Periodic questions and reminders help Eric remember to make updates and view new opportunities.
- Various settings allow Eric to share his tax data, see who has access to it and schedule reminders.
- Eric can do all of this on the go.
- *He has his tax data available wherever he is; he has easy access and the ability to share when he's in meetings with his accountant or his mortgage broker. He can add receipts when he's at the donation center and he can see new opportunities when he has downtime on the train or while waiting in line.*



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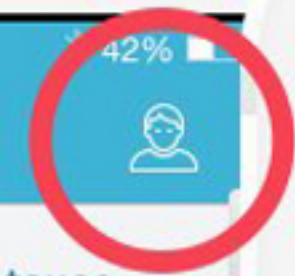
Concept

UPDATE LIFE EVENTS



← Eric can also update life events throughout the year as his circumstances change. He can choose to make an update (from the home screen) when something changes. If he forgets, IRS 365 reminds him monthly.

SHARE AND MONITOR



taxes

es

explored

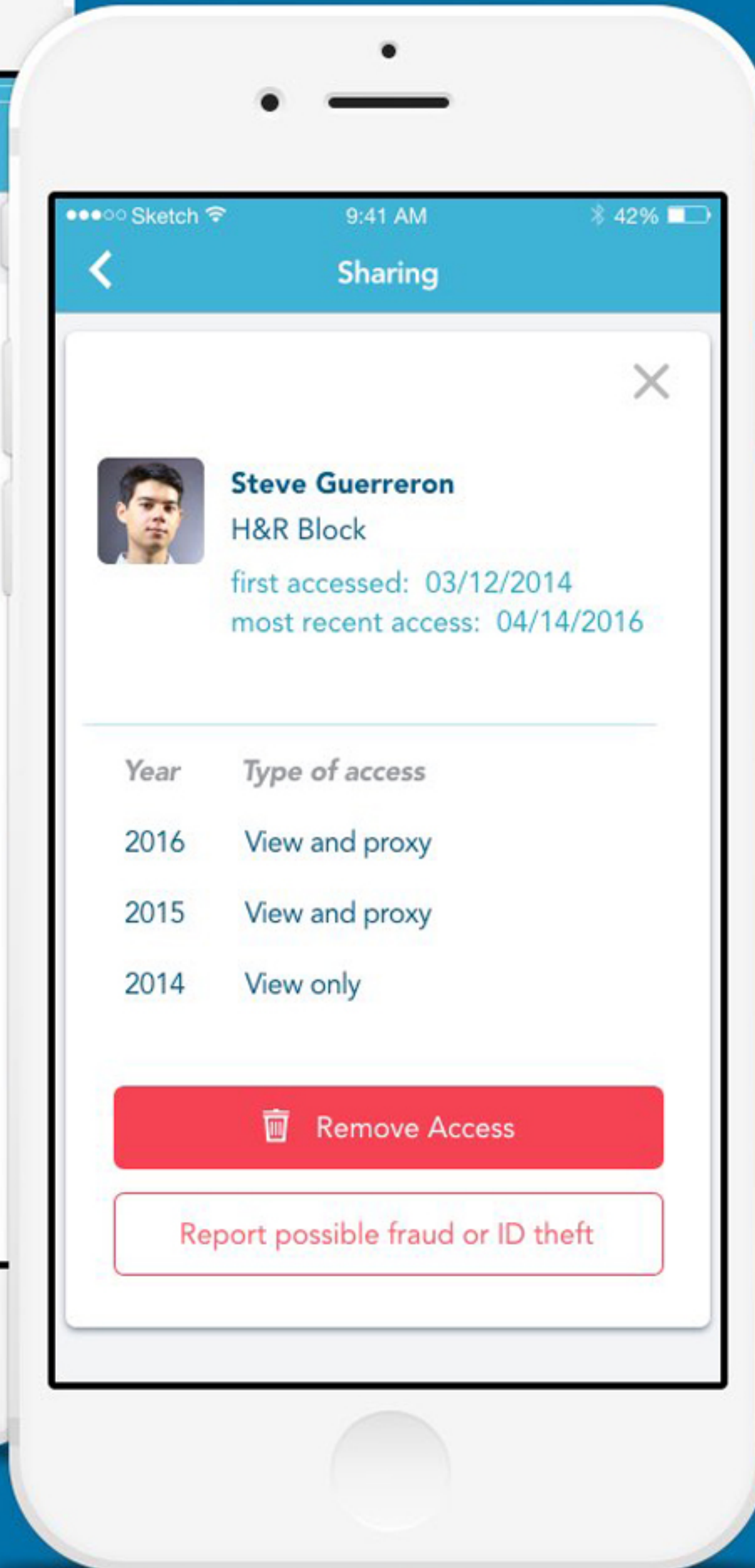
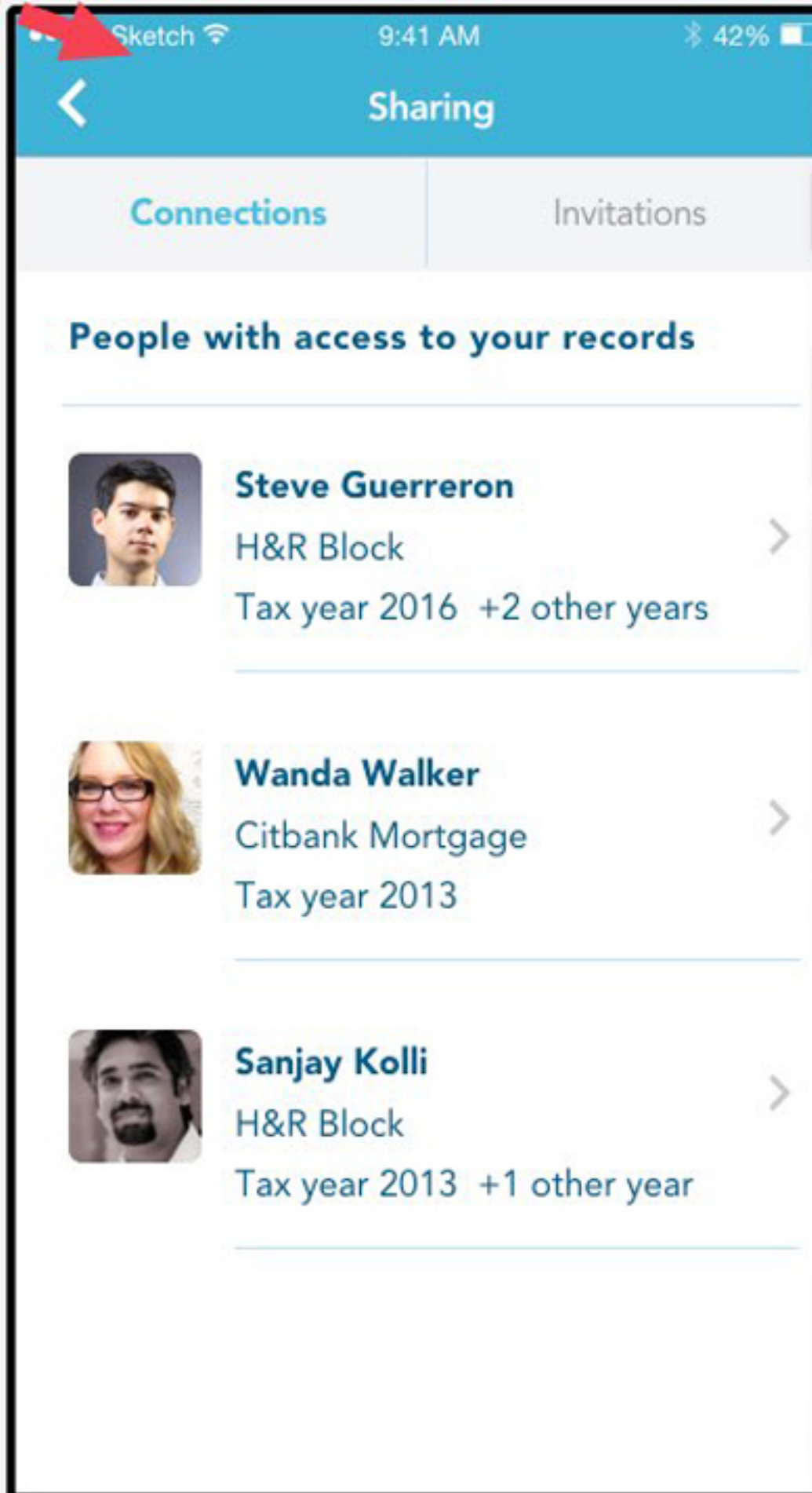
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Help



← Eric can access preferences and other data from his profile settings.

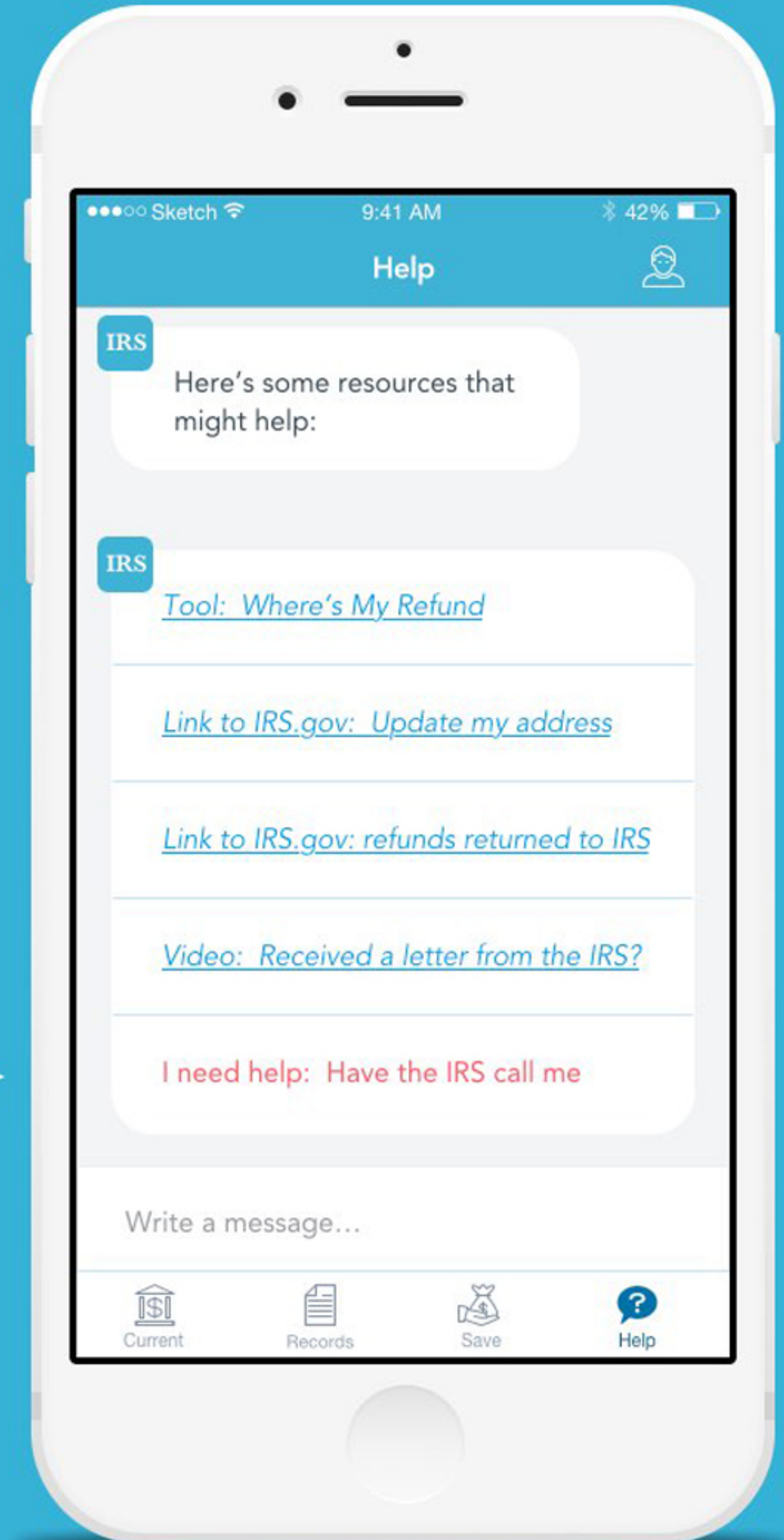
← With ID theft on the rise, he can see and monitor people with access to his tax data and invite new people to view his data without paperwork.

← He can remove someone's access if they no longer need it, or report someone with unauthorized access to protect his ID and data.

FIND ANSWERS

IRS 365 returns tools, articles and videos that might help Eric educate himself and solve his problem. ➡

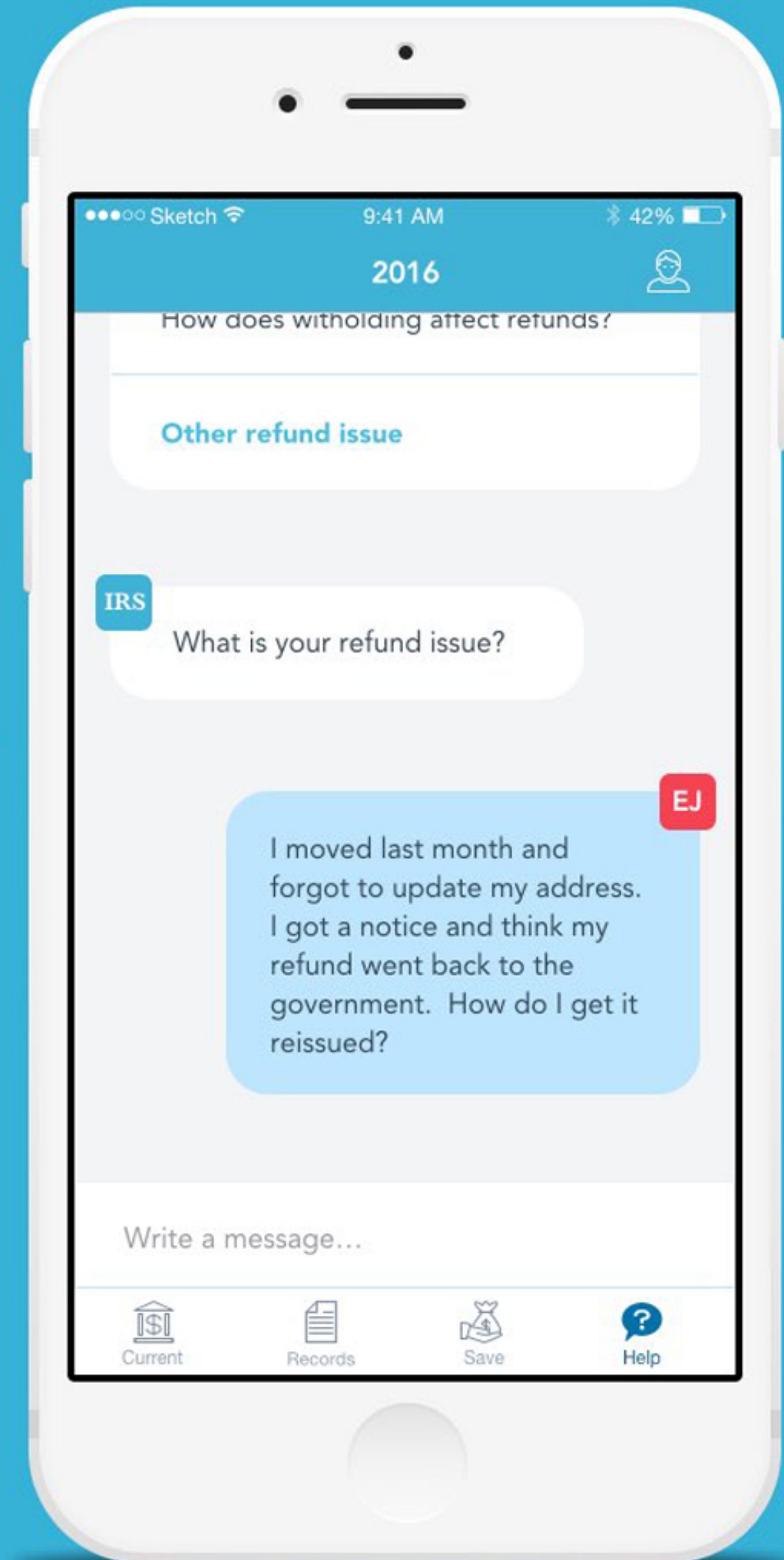
If none of the resources answer Eric's question, he can request a call back so he doesn't have to wait on hold or call repeatedly. ➡



FIND ANSWERS

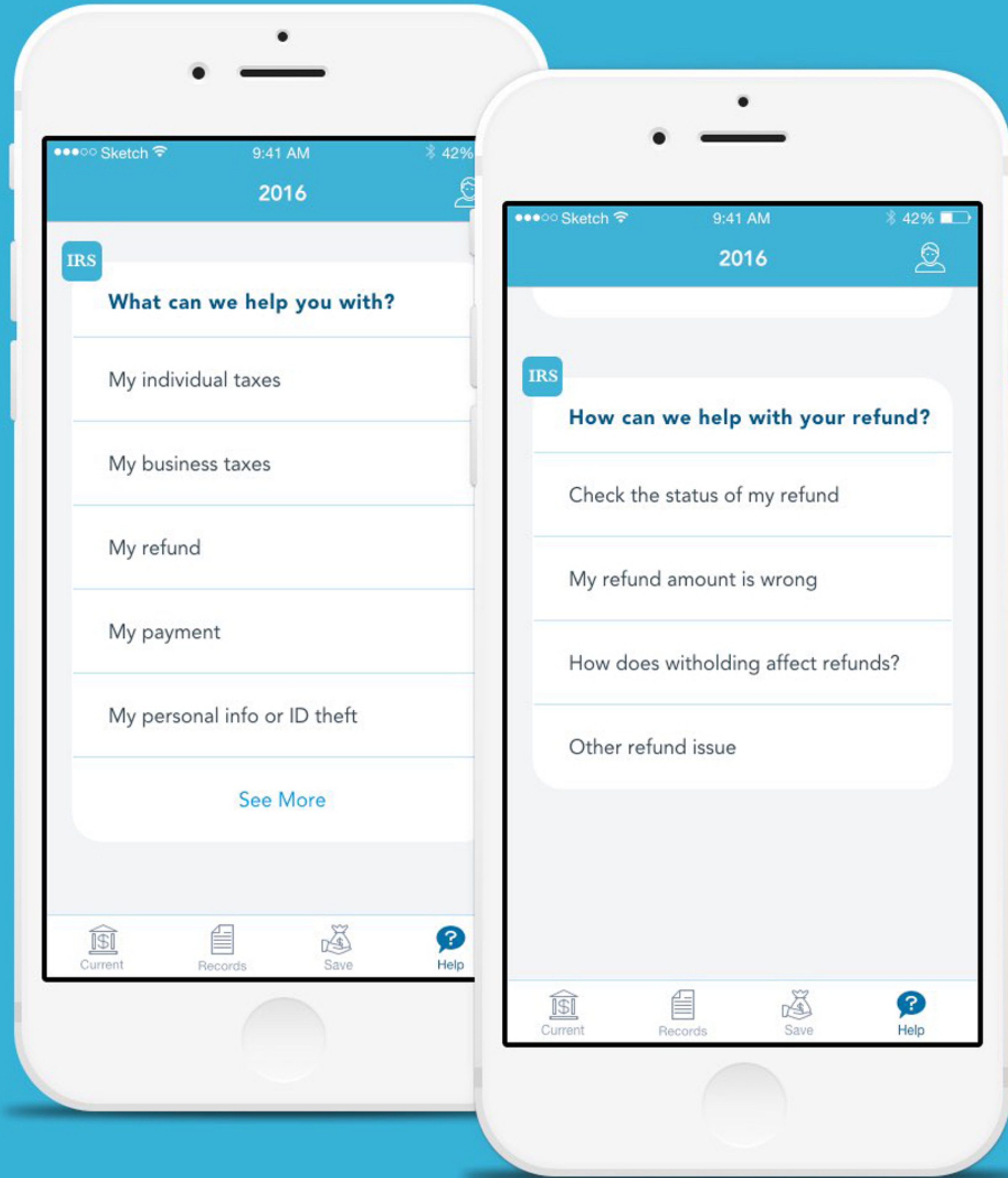
If Eric's issue is easy, we can show him the help articles and tools he needs. If it's complex, he can write his own message describing it.

Even without fancy Natural Language Processing, we can look for key words that match Eric's query, or use more sophisticated algorithms to parse his help request.

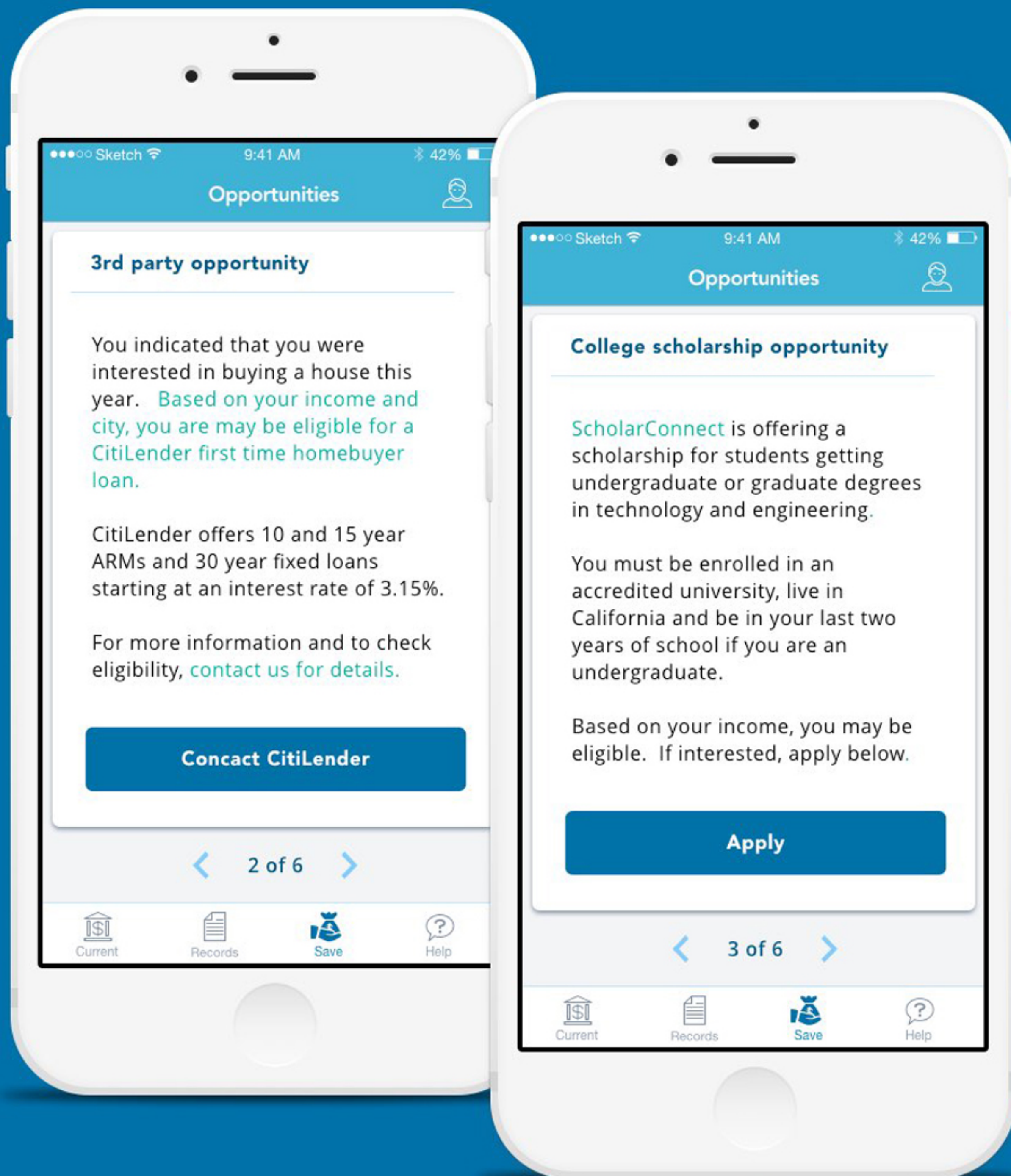


FIND ANSWERS

IRS 365 uses a new help interface inspired by Facebook Messenger Bots. Finding help feels as easy to Eric as texting.

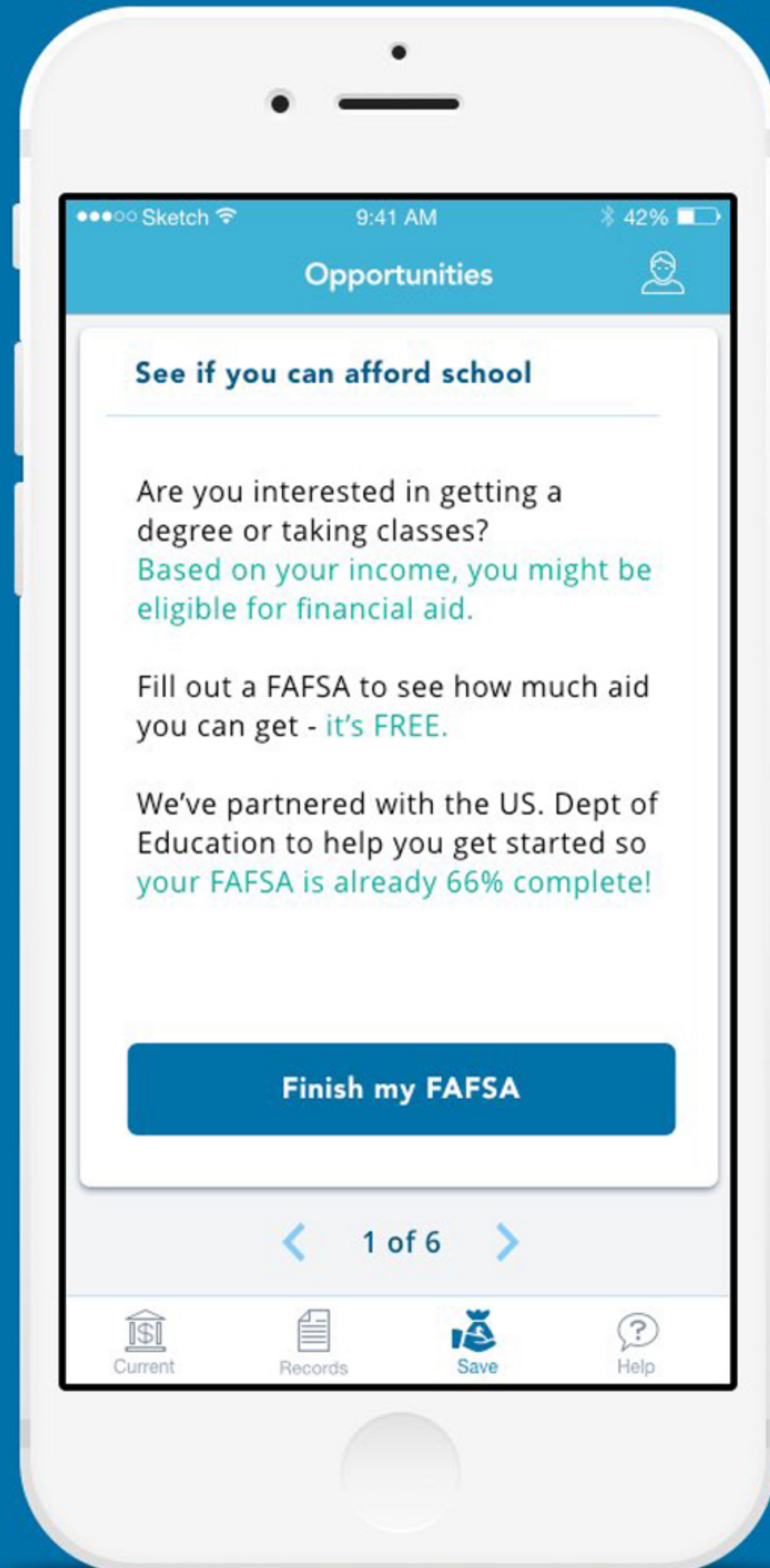


SEE NEW OPPORTUNITIES



Approved 3rd parties can also integrate with IRS 365 so Eric can see their opportunities if he opts into that service. 3rd parties can offer their opportunities to taxpayers anonymously based on a user's income, life events, demographics or interests expressed in the life event survey.

SEE NEW OPPORTUNITIES



← Eric can view opportunities that he otherwise might have missed.

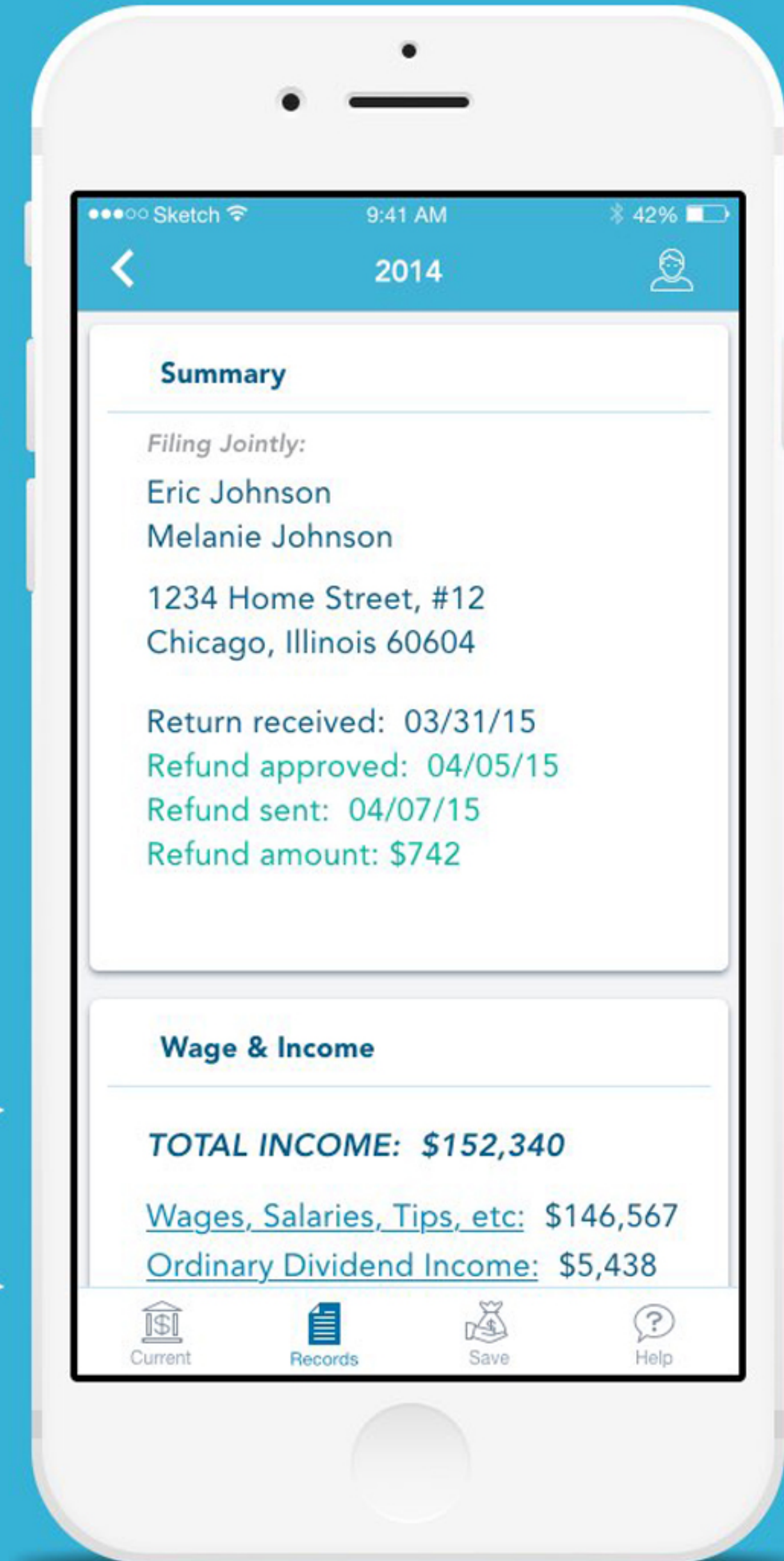
← Other government agencies can integrate with IRS 365 so tax data can be exported right into forms and applications.

GAIN UNDERSTANDING

Eric can see a summary of his refund or payment.

High level totals are displayed at the top, with details below.

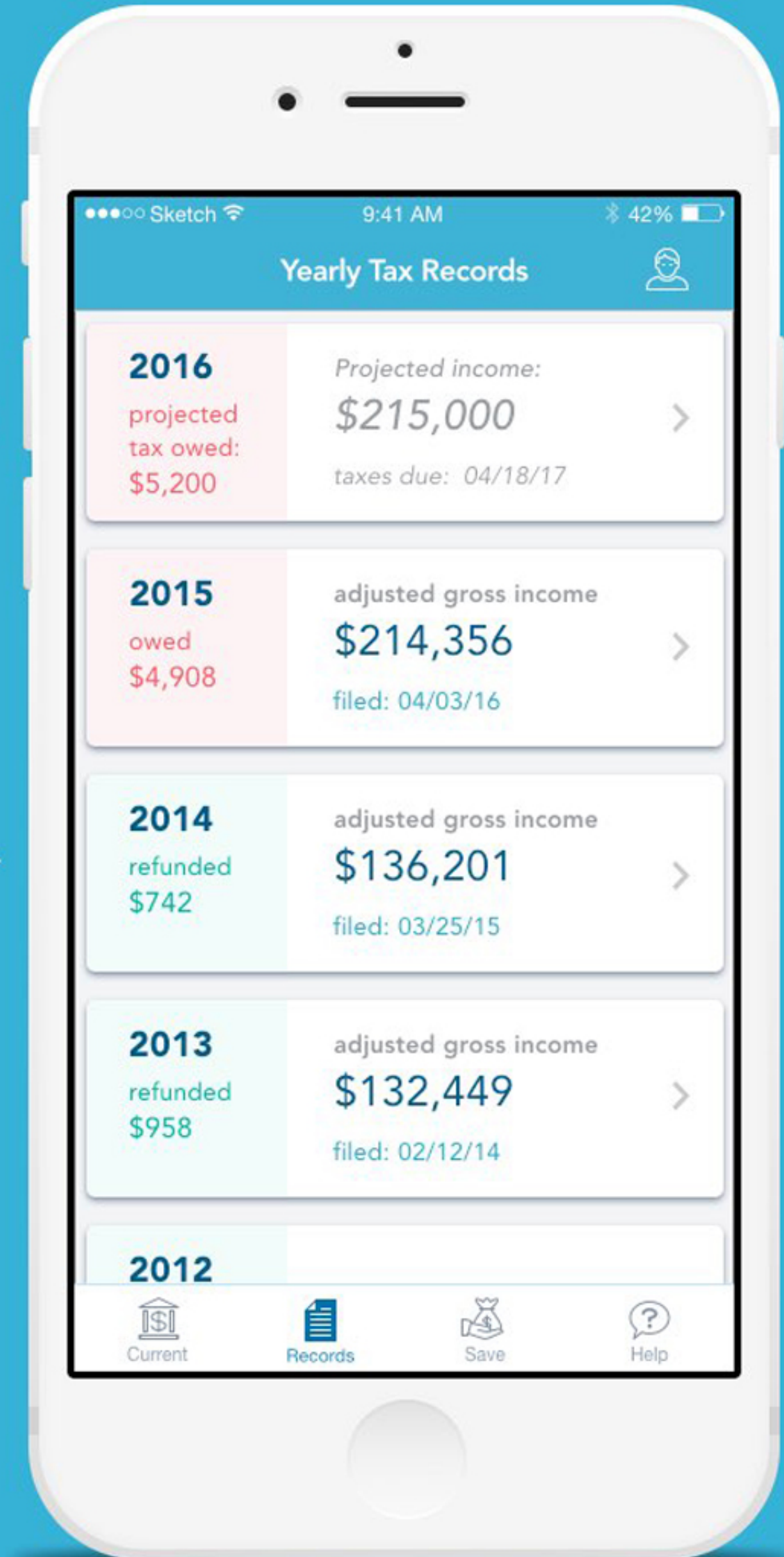
Tax items underlined are clickable, and show a popup with definitions and details.



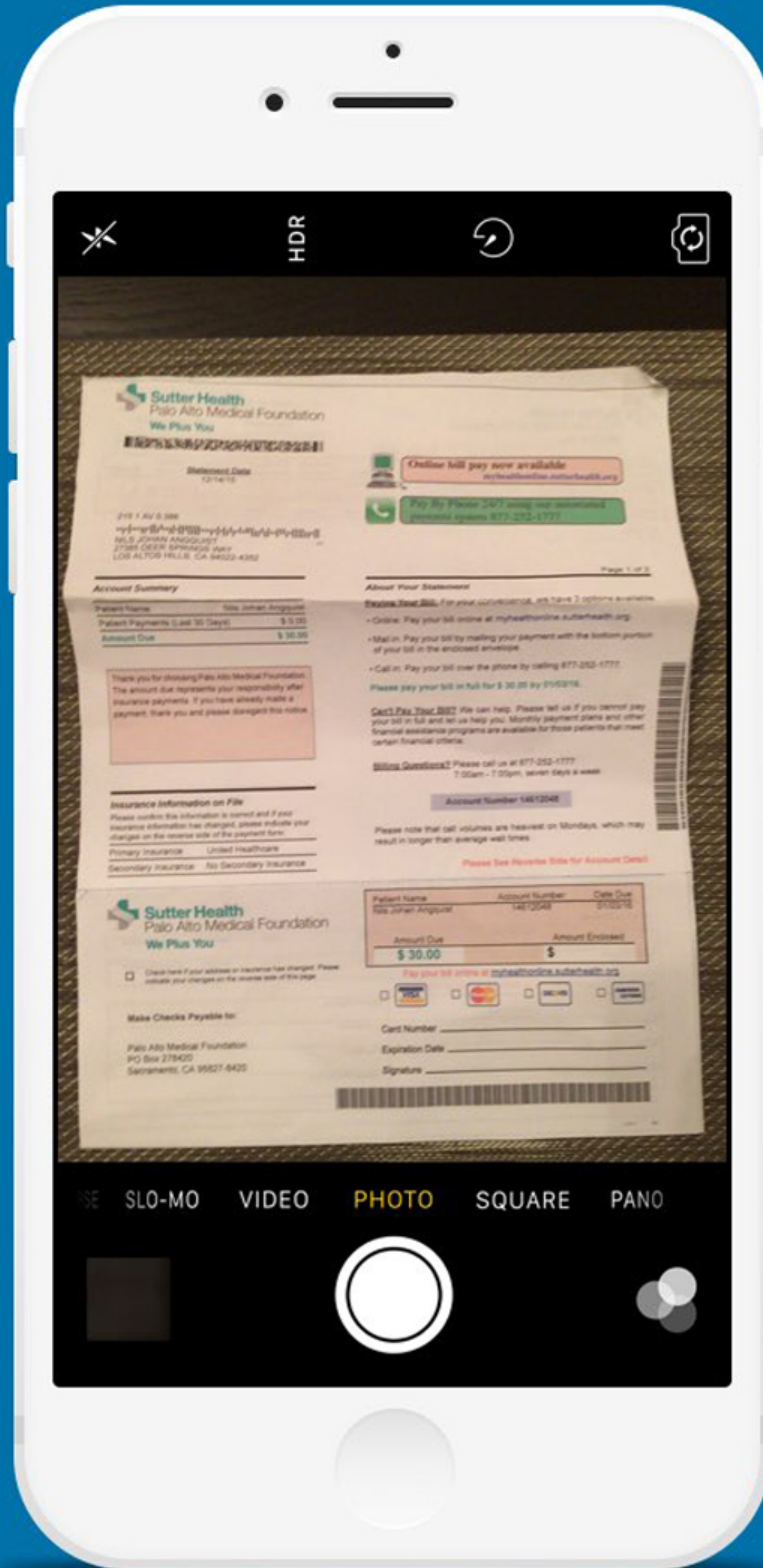
GAIN UNDERSTANDING

Eric can see projected info about his current tax year, based on last year, life events, and his receipts. →

He can also see the most important information from previous years at-a-glance. →

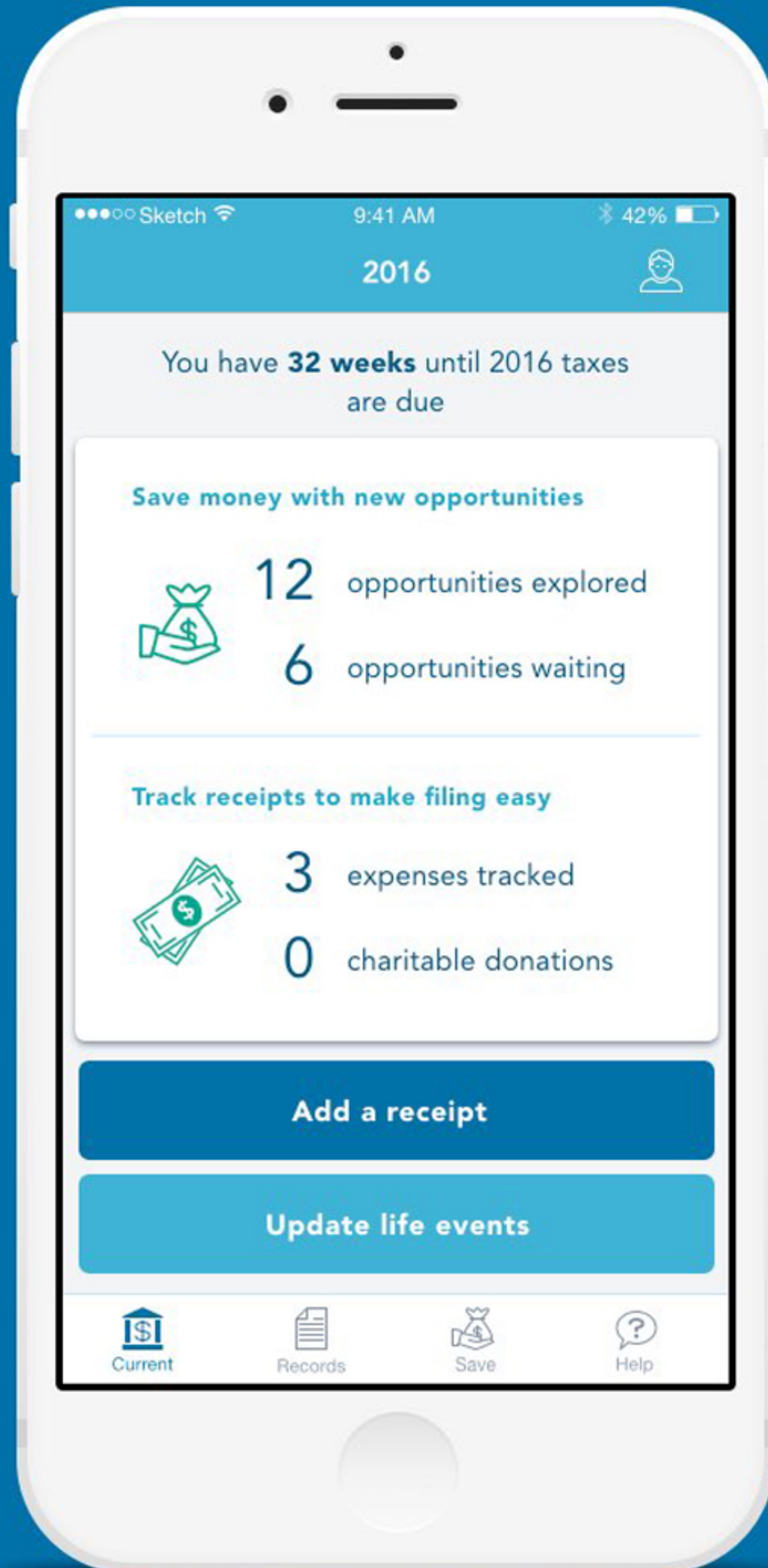


REMINDERS & ACTIONS



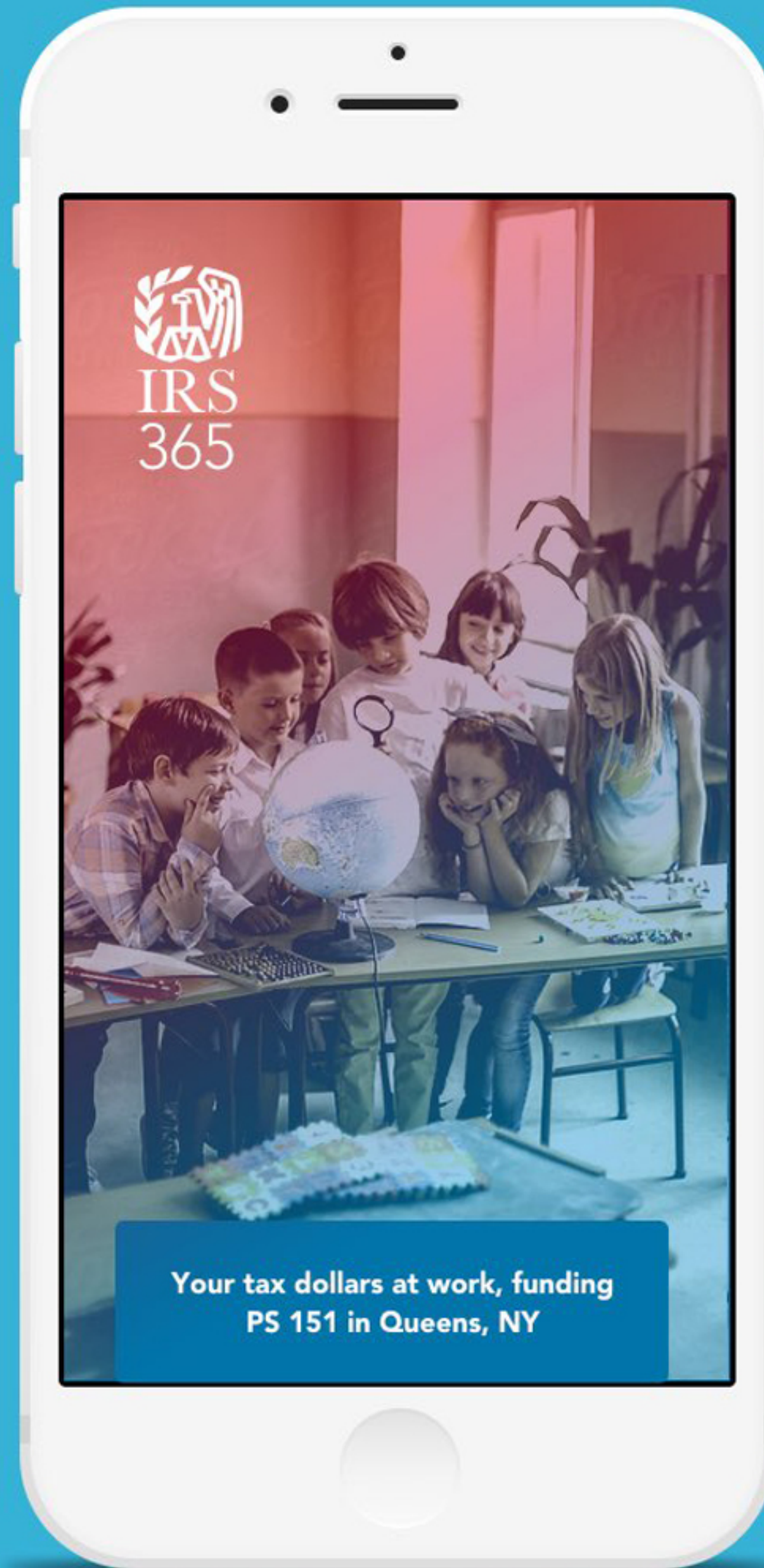
If Eric chooses to Add a receipt on the home screen he can take a photo of his donations, expenses, etc. Photos and any info he enters are then added to the record he's building for his current tax year.

REMINDERS & ACTIONS



- ← Eric is reminded how much time is left before he needs to file.
- ← He can see how proactive he's being by tracking receipts and looking for ways to save
- ← Buttons serve as extra reminders and make it easy for him to instantly make updates
- ← Navigation is simple and easily discoverable

FEELS POSITIVE



- ← Splash and login screens highlight a new way tax dollars pay for public services each day, reminding taxpayers of why taxes are an important social good.