



ABOUT THE TAX DESIGN CHALLENGE

The goal of this challenge is to reimagine the taxpayer experience and design the taxpayer experience of the future. With over 200 data fields at play, how might we design, organize, and present tax information in a way that makes it easier for taxpayers to manage their taxpayer responsibilities, and to use their own taxpayer data to make informed and effective decisions about their personal finances?

STATISTICS

48 Design Submissions

15,000+

TaxDesignChallenge.com
Visitors

80 Challenge.gov Followers

6 Prize Categories

5 IRS Judges

4 Challenge Winners

WINNERS



Andrew Miller

Andrew is a user-interface designer and front-end web developer, currently working as a contractor for Sandia National Labs. In his free time he serves as the Creative Director of Model T Digital, a freelance web developing agency.



Andrea Angquist

Andrea is an award-winning designer living and working in Silicon Valley. Currently, she is a Product Designer for Pivotal, where she helps companies design and launch new products and transform their teams using Lean UX and Agile methodologies.



Sam Nguyen

Sam is a CERTIFIED FINANCIAL PLANNER™ professional, an Enrolled Agent, and is pursuing the Certified Public Accountant license. He is currently a tax advisor at Alexandria Capital, an SEC-registered investment advisory firm in Washington, DC.



Vidhika Bansal

Vidhika Bansal is a UX Strategist with a background in behavioral science, research, and human-centered design. She is passionate about the power of words and thoughtful design to build experiences that make people's lives easier, healthier, and happier.



Dante Vono

Dante is a User Experience Designer who has been creating interactive tools for the web since 2000. His specialties include personal finance, investment tools, and data visualization. He's designed solutions used by millions on sites like MarketWatch.com and WSJ.com.



IRS MyService by Andrew Miller

First Place, Best Overall Design

Highest combined score in all categories – Overall Appeal, Taxpayer Usefulness, Financial Capability, Visual Hierarchy, Information Density, and Accessibility.

First Place, Best Taxpayer Usefulness

Allows the user to better understand and meet his or her taxpayer responsibilities.



START:
Taxpayers can sign up from a redesigned IRS Homepage...



INTRODUCING:
IRS MyService

DASHBOARD (HOME)

Profile Sidebar
You and your family are constant variables that don't often change. Update your 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
Profile information such as ages of children can ping automatic notifications that can be used to trigger reminders and calls to action.

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.

TYPE	ORIG. VALUE	COMPUTED VALUE	SHEETS & FORMS	COMPARE
Wages, Salaries, Tips, etc.	\$50,490.00			
Earned Income		\$4,242.00	Schedule EIC	
Other Income	\$1,000.00			
Other Income	\$1,000.00		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	

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

NOTE: This view does not include all designs submitted by contestant.



IRS 365 by Andrea Angquist

Second Place, Best Overall Design

Second highest combined score in all categories – Overall Appeal, Taxpayer Usefulness, Financial Capability, Visual Hierarchy, Information Density, and Accessibility.

Second Place, Best Taxpayer Usefulness

Allows the user to better understand and meet his or her taxpayer responsibilities.



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.

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.

GAIN UNDERSTANDING

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

Year	Adjusted Gross Income	Adjusted Taxable Income	Estimated Tax	Refund
2016	\$215,000	\$126,201	\$12,200	\$10,200
2015	\$214,356	\$132,449	\$12,200	\$10,200
2014	\$176,201	\$112,000	\$12,200	\$10,200
2013	\$132,449	\$112,000	\$12,200	\$10,200
2012	\$112,000	\$112,000	\$12,200	\$10,200

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

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.

FIND ANSWERS

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

- What can we help you with?
- My individual taxes
- My business taxes
- My refund
- My payment
- My personal info or ID theft

How can we help with your refund?

- Check the status of my refund
- My refund amount is wrong
- How does withholding affect refunds?
- Other refund issue

SHARE AND MONITOR

- 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.

NOTE: This view does not include all designs submitted by contestant.

taxez by Sam Nguyen & Vidhika Bansal

First Place, Financial Capability

Makes it easier for the taxpayer to make informed and effective decisions about their personal finances.

Welcome, Stefan!

Search [] Q English Help Stefan Brown

Stefan Brown Taxpayer SSN: 222-11-3535 DOB: 2/17/78 Age: 38
 Madeleine Brown Spouse SSN: 222-15-5858 DOB: 8/2/76 Age: 39
 Jesse Brown Son SSN: 555-12-9998 DOB: 3/3/99 Age: 17
 Ella Brown Daughter SSN: 555-12-9999 DOB: 3/24/08 Age: 8

Address: 2088 Farhampton Ave. Falls Church, VA 22042
 Filing status: Married filing jointly
 Exemptions: 4

TAX RETURN DATA	FORMS & NOTICES	KEY UPDATES
2015 2014 2013 EARLIER	Share	Download
Expand all Hide calculations	Filed	Change
Total Income	30,307	+105
Adjustments	-250	-250
Adjusted Gross Income (AGI)	30,057	+105
Deductions	-12,600	-12,600
Exemption Amount	-16,000	-16,000
Taxable Income	1,457	+105
Tax	0	0
Payments and Credits	-2,838	-10
Refund	2,838	+10

Made a mistake? Amend return

taxez Because managing your tax data shouldn't be taxing.

Tax Payments and Credits: 0 -2,838 -10 -2,828 Refund 2,838 +10 2,828

NEXT STEPS

- It looks like you are eligible to claim an Earned Income Credit of \$4,170 on your 2015 tax return. Would you like to claim this?
 - No thanks, please leave it with the IRS
 - Yes please, I'd like to claim my credit
- You may be eligible to claim SNAP benefits. Would you like to claim this?
 - No thanks, maybe I'll check another time
 - Yes, I want to check my eligibility

THINGS TO CONSIDER
 Jesse is 17 and may qualify for education assistance. Would you like to fill out a FAFSA?
 Complete FAFSA in 5 minutes

TAXPAYER TIP OF THE DAY
 Start saving with myRA, a retirement savings account with the US Treasury. There are no fees, no minimums, and no risk of losing invested money.
 Open a myRA today

taxez Because managing your tax data shouldn't be taxing.

Stefan Brown SSN: 222-11-3535 DOB: 2/17/78 Age: 38
 Madeleine Brown SSN: 222-15-5858 DOB: 8/2/76 Age: 39
 Jesse Brown SSN: 555-12-9998 DOB: 3/3/99 Age: 17
 Ella Brown SSN: 555-12-9999 DOB: 3/24/08 Age: 8

TAX RETURN DATA FORMS & NOTICES KEY UPDATES

View full Account Transcript

FORMS: 2012-2014-2013-EARLIER
 2012 - Wage & Tax Statement: FCS (Stefan)
 2012 - Wage & Tax Statement: Valley View Private Schools (Madeleine)
 2012-10 - Interest Income: Bank of America (Stefan)
 2012-11 - Proceeds From Broker Barter Exchange: Amazon (Stefan)
 2012-11 - Proceeds From Broker Barter Exchange: Apple (Stefan)

NOTICES: Notice Issued - 3/15/13 Notice Issued - 3/9/11 Collection due process Notice of Intent to Levy Issued - 11/10/08 Notice Issued - 4/21/08

Account transcript: Taxpayer can view full IRS Account Transcript here.

Tax forms: Easily access each tax form for the year in PDF format, or download all in one batch.

IRS notices: Allow taxpayers to access in PDF format past IRS notices issued to them.

Help menu: Many helpful options for the taxpayer in this menu.

Live Chat: Communicate in real time with an IRS agent.

Forums: Get financial advice from the community.

Taxpayer Dictionary: Look up tax terms you're unfamiliar with.

FAQs & MythBusters: Find answers to common taxpayer questions.

Begin here to get a quick walk-through of the site.

taxez Because managing your tax data shouldn't be taxing.

Welcome, Stefan!

LOAN APPLICATIONS
 This is your hub for learning about and applying for different types of loans. Where would you like to start?
 Read more about loans and your rights as a borrower.

Mortgages Student Loans Small Business Loans
 Auto Loans Personal Loans Other Resources

Loan Calculator
 This calculator will determine the monthly payments on a loan.

Loan amount: \$90,000
 Loan term in months: 360
 Interest rate per year: 4.5%
 Loan start date: 5/10/16

Calculate

Your monthly payment is: \$456.02

Other resources: Provides other links and resources for taxpayers who are interested in getting a loan.

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MyTaxOnline by Dante Vono

Second Place, Best Financial Capability

Makes it easier for the taxpayer to make informed and effective decisions about their personal finances.

This screenshot shows the 'Did you know?' section of the MyTaxOnline interface. It features three informational cards with icons and buttons:

- No retirement contributions:** A card with a 'myRA' icon and a 'Save for retirement' button. Text: "Your most recent tax return doesn't include any retirement savings. Did you know you could start saving for retirement today with myRA?"
- College age is nearing for dependents:** A card with a 'FAFSA' icon and a 'Prepare for college' button. Text: "The information in your tax return shows your dependents are nearing college age. Your tax data will automatically fill much of a loan application for you!"
- No mortgage interest tax deduction:** A card with an 'FHA Loan' icon and a 'See what you can afford' button. Text: "Your most recent tax return doesn't include mortgage interest. If you're looking to buy homes, your tax data can help you see what you can afford."

Below these cards is a table of tax years:

Tax year	RECEIVED	DATE	REFUND	AMOUNT
2015 Tax year	RECEIVED	Mar. 20, 2016	REFUND	\$2,832.00
2014 Tax year	RECEIVED	Apr. 2, 2015	REFUND	\$2,741.00
2013 Tax year	RECEIVED	Mar. 29, 2014	OWED	\$973.00

This screenshot shows the 'Income' summary table for the tax period ending Dec. 31, 2015. It includes a 'Summary' section and a table with columns for 'PER RETURN', 'PER IRS COMPUTER', and '5-YEAR TREND'.

On March 20, 2016, you filed Form 1040 as Married Filing Jointly and your refund was \$2,832. Here's how that amount was calculated:

Category	PER RETURN	PER IRS COMPUTER	5-YEAR TREND
Income			
Wages, Salaries, Tips, Etc.	\$51,832.00		
Other Income	\$1,250.00		
Total Income	-\$53,098.00	\$53,082.00	
Adjustments to Income			
Student Loan Interest Deduction	\$926.00		
Adjusted Gross Income	\$52,150.00	\$52,150.00	
Tax and Credits			
Education Credit	\$1,353.00	\$1,353.00	
Child & Dependent Care Credit	\$491.00	\$491.00	
Total Credits	\$1,844.00	\$1,844.00	
Refund or Amount Owed			
Your Refund Amount	\$2,832.00		

This screenshot shows the detailed 'Income' table for the tax period ending Dec. 31, 2015. It includes a 'Summary' section and a table with columns for 'PER RETURN', 'PER IRS COMPUTER', and '5-YEAR TREND'. A tooltip is visible over the 'Total IRA Contributions' row.

Category	PER RETURN	PER IRS COMPUTER	5-YEAR TREND
Income			
Wages, Salaries, Tips, Etc.	\$51,832.00		
Taxable Interest Income: Sch B	\$0.00		
Tax-Exempt Interest	\$0.00		
Ordinary Dividend Income: Sch B	\$0.00		
Qualified Dividends	\$0.00		
Refunds Of State/Local Taxes	\$0.00		
Adjusted Gross Income	\$0.00		
Retirement Income (Schedule C)	\$0.00	\$0.00	
IRA Contributions (Schedule R)	\$0.00	\$0.00	
Total IRA Contributions	\$0.00	\$0.00	
Total Pensions and Annuities	\$0.00		
Taxable Pension and Annuities	\$0.00		
Rent/Royalty/Partnership/Estate (Schedule E)	\$0.00	\$0.00	
Rent/Royalty Income/Loss Per Computer	\$0.00	\$0.00	
Estate/Trust Income/Loss Per Computer	\$0.00	\$0.00	
Partnership/S-Corp Income/Loss Per Computer	\$0.00	\$0.00	

Tooltip: An IRA is a personal savings plan that gives you tax advantages for setting aside money for retirement. Found on: Form 1040 line 15

This screenshot shows the 'Your 2015 filing status was married filing jointly.' message. It includes a 'Summary' section and a 'More information:' box with a link to the IRS website.

Your 2015 filing status was married filing jointly.

Jump to section where "married filing jointly" appears >

More information:
If you are married, you and your spouse can choose to file a joint return. If you file jointly, you both must include all your income, exemptions, deductions, and credits on that return. You can file a joint return even if one of you had no income or deductions.
<https://www.irs.gov/publications/p17/d402.html>

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