

CREATE & APPLY
SHARE
HUMAN
CENTERED
DESIGN KNOWLEDGE



Continuously improve your website by using customer feedback and web analytics: *An IRS case study*

Presentation by Kira Prin & Sam Chapman

June 29, 2023

Customer Experience

IRS Case Study Presenters:



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Product Manager,
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Portal apps

Housekeeping

- Recording
- Mute
- Resource
 - Chat directly with Amy Castellani
 - Email acastellani@tantustech.com





IRS | Office of Online Services

Center for Medicare/Medicaid HCD Community of Practice – June 29, 2023

Continuously improve your website by using customer feedback and web analytics

An IRS case study



Did you know...



**That there's an
application on
IRS.gov that helps
eligible people with
filing their taxes for
free?**



**And that we update
that application to
meet people's needs
every year based on
customer feedback
and web analytics?**



Key takeaways

- IRS Free File Program overview
- User experience process used to update the application
- Analytics process used to make ongoing updates to the application
- Tips and tricks you can use on your next project



**There's an IRS Free
File Program you
may have heard of
before**



IRS Free File Program's overview

The IRS Free File Program lets people prepare and file their federal income tax return online using **guided tax preparation** at an IRS partner site or using the **Free File Fillable Forms** on IRS.gov. It's safe, easy and at **no cost to the public**.

For more information, visit www.irs.gov/freefile



Screenshot of IRS Free File application's homepage

An official website of the United States government

IRS

Help | News | English | Charities & Nonprofits | Tax Pros

File | Pay | Refunds | Credits & Deductions | Forms & Instructions

Search

Home / File / Individuals / How to File / Free File: Do Your Federal Taxes for Free / IRS Free File Guided Tax Preparation Options

IRS Free File Guided Tax Preparation Options

Do your taxes online for free with an IRS Free File provider.

If your adjusted gross income (AGI) was \$73,000 or less, review each provider's offer to make sure you qualify. Some offers include a free state tax return.

Use the IRS Free File Lookup Tool to narrow your list of providers or the Browse All Offers page to see a full list of providers. After selecting one of the IRS Free File offers, you will leave the IRS.gov website.

What You Will Need

- ✓ Income statements like W2s or 1099s
- ✓ Adjustments to income
- ✓ Dependent and spouse information, if applicable
- ✓ Prior Year AGI or Prior Year Self-Select PIN

Browse All Providers

Review the full list of providers and use the filters to narrow the search.

Browse all

IRS Free File Online Lookup Tool

Let the easy-to-use tool find your provider.

Start lookup tool

Frequently Asked Questions

- + Are these programs safe?
- + What does "free" in IRS Free File mean?

Important Note: A state tax return is not required to receive a free federal tax return.

Callouts: 1 (Do your taxes online...), 2 (What You Will Need), 3 (Browse All Providers and Start lookup tool), 4 (Are these programs safe?)



**It's all about the
iterative process**

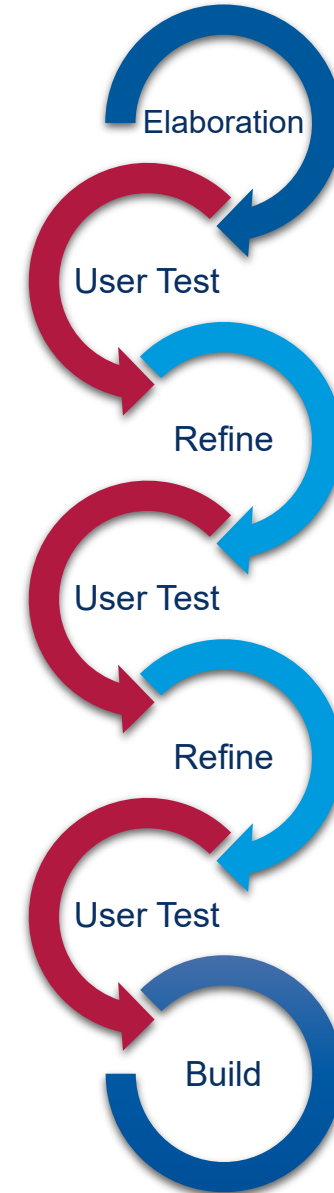


Conceptualization process



Iterative design approach

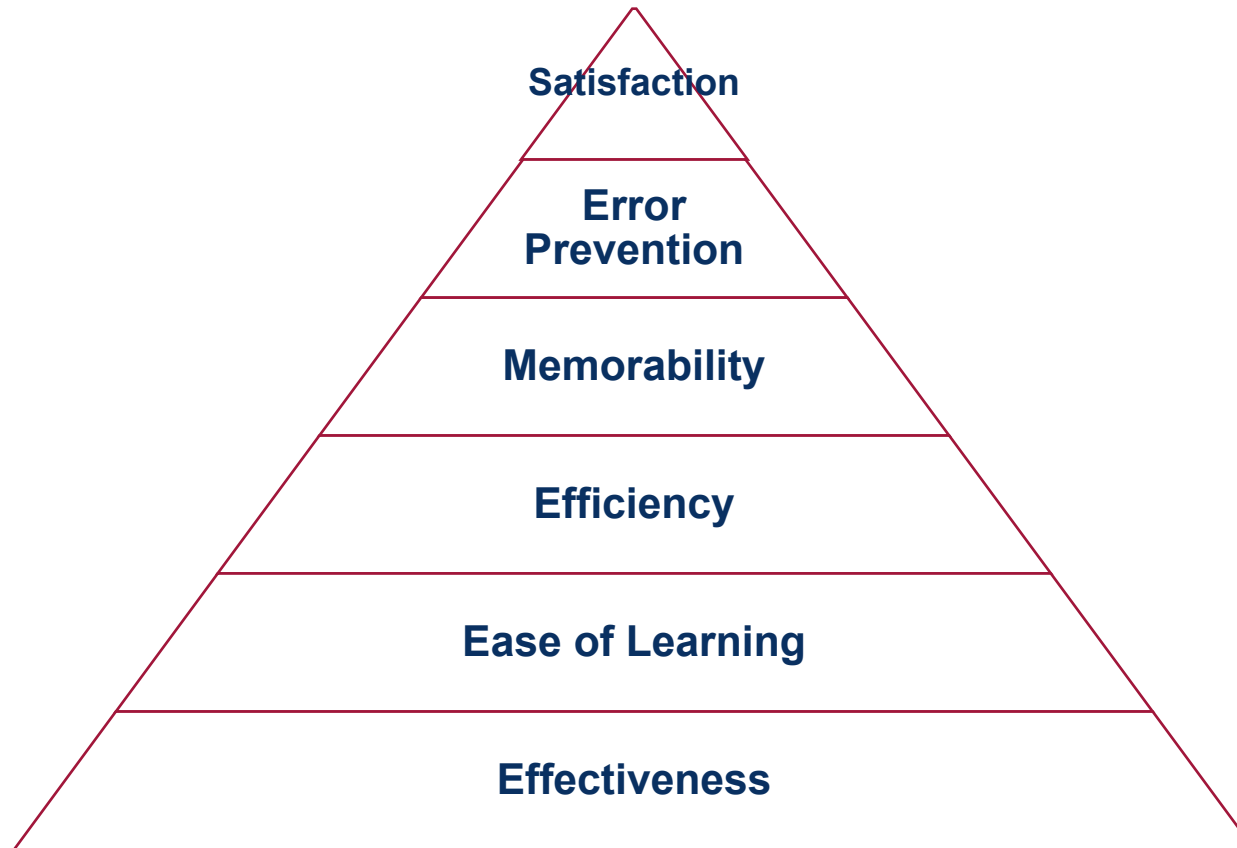
1. Identify a need
2. Elaborate and brainstorm
3. Test the application with real users
4. Have a “refine” approach
- 5. Test again**
6. Repeat as necessary
- 7. Update the application with continuous analytics and feedback**





Guiding principles

Principles of a usable interface include:

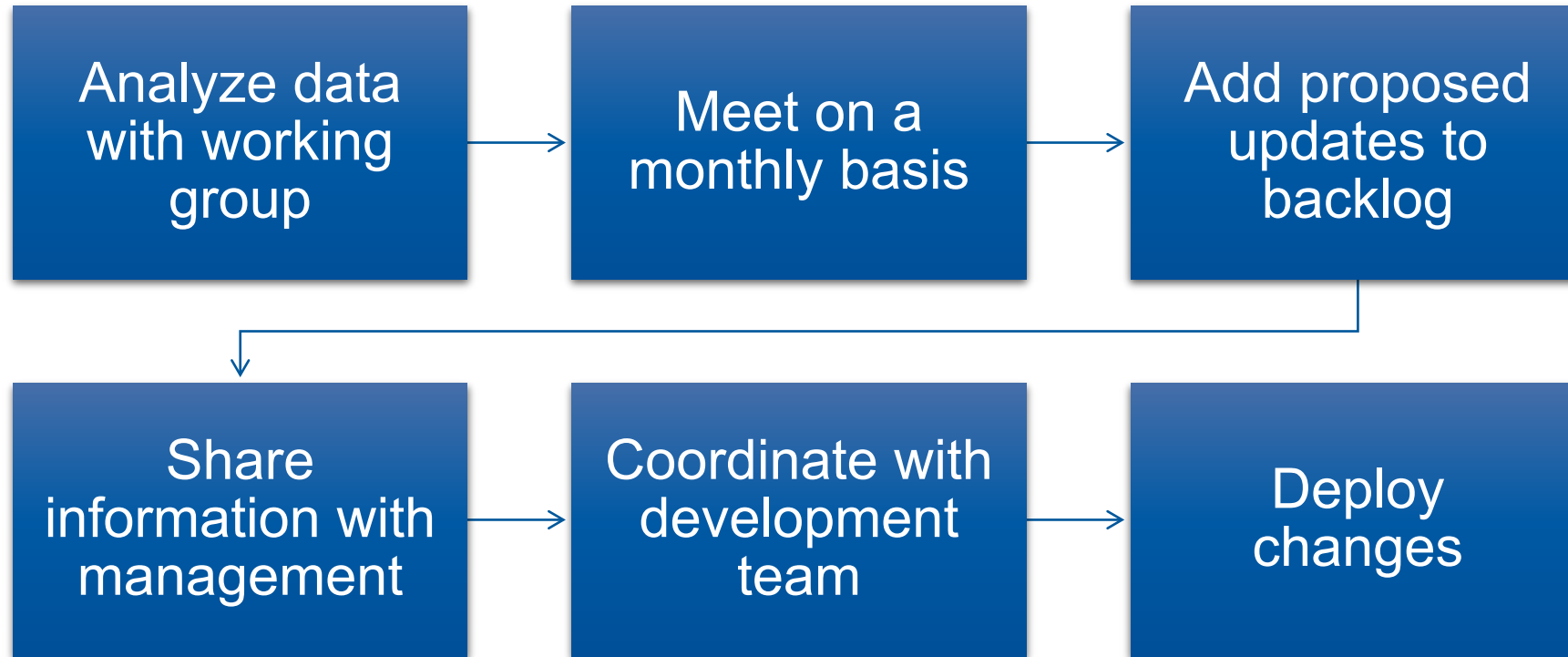




**And it's also about
collecting and
analyzing data
properly**



Data analysis process

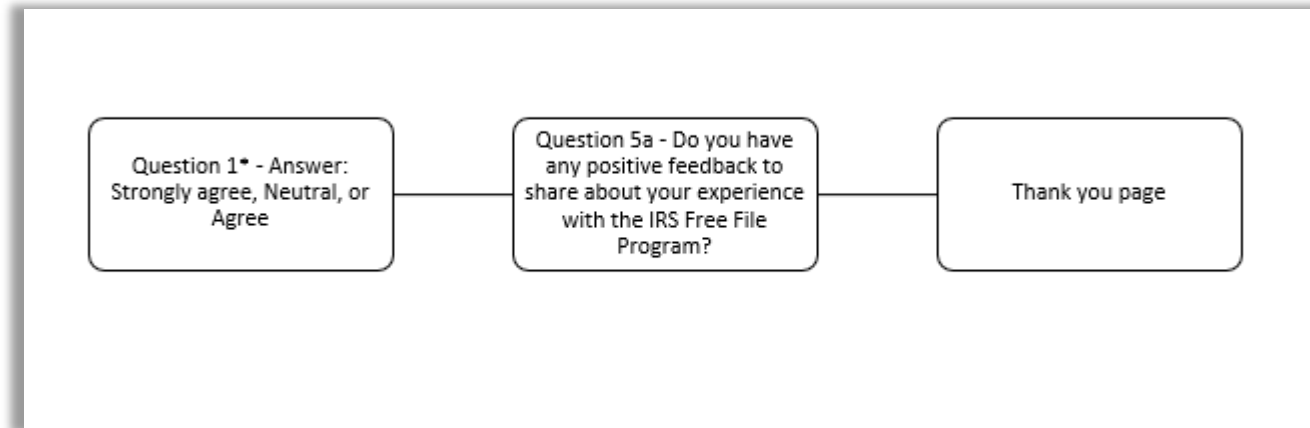




Customer survey updates

We recently updated the questions people can answer when they get the in-app survey.

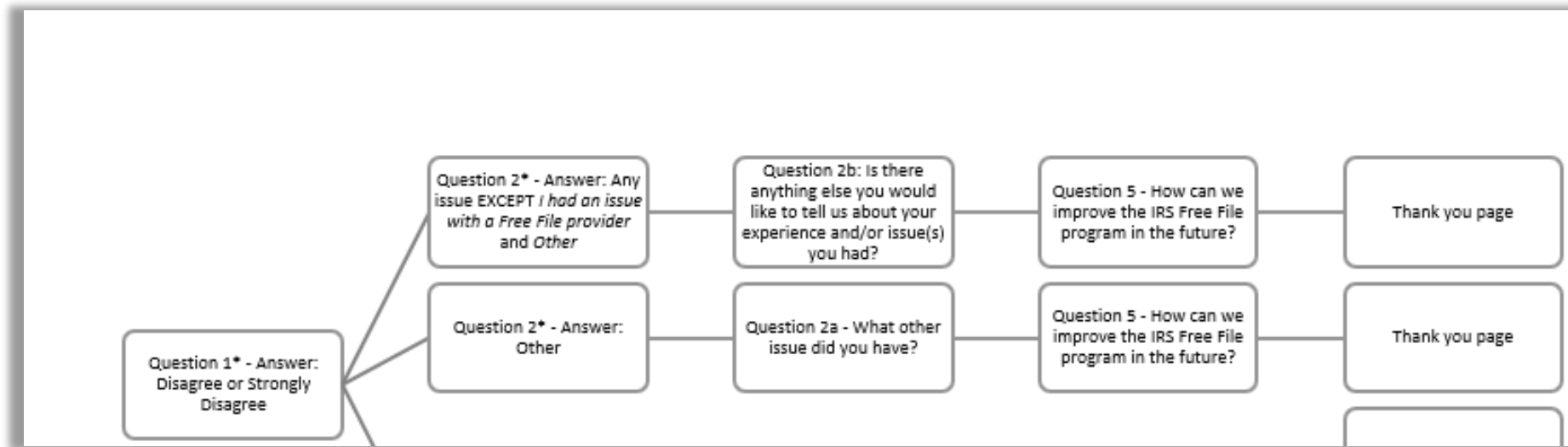
Positive experience user flow





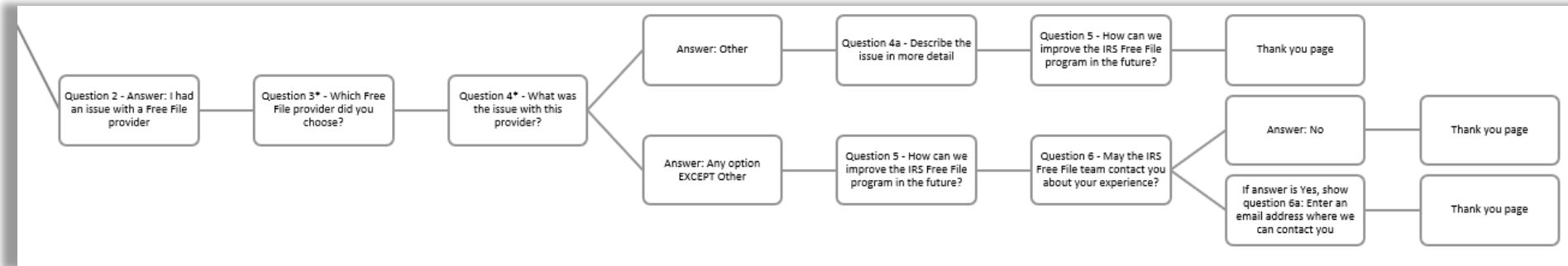
Customer survey user flow updates

Negative experience user flow: Part I





Negative experience user flow: Part II





Consistent analytics reports

Sessions to click out to a Free File provider

Mobile sessions vs. Non-mobile sessions

Year-Over-Year Free File provider comparison

Survey ratings (1 to 5 stars)

User quotes



People's privacy

- All collected data is **aggregated and de-identified**
- Research findings and analytics details **are only shared** with the IRS Free File working group
- **All privacy approvals are in place** before engaging with IRS Free File customers:
 - IRS Privacy and Civil Liberties Assessment approval (IRS PCLIA)
 - Office of Management and Budget Paperwork Reduction Act approval (OMB PRA)
- Participation in the in-app survey and user testing sessions **is completely voluntary** and people can exit the survey/session at any time **with no risk of penalty**



Data drives actions



Non-filers needed to use Free File application in 2021

Before analyzing data

Estimated Adjusted Gross Income (AGI)

Enter your total pre-tax income: ^(Required) [?](#)

Enter any pre-tax payroll deductions made this year or any adjustments to income you expect to make when you file your taxes:

Payroll Deductions:

- 401(k) or other Tax-Deferred Retirement Plan [?](#)
- HSA/FSA/Cafeteria plan [?](#)

Adjustments to Income:

- 1/2 self-employment tax paid [?](#)
- SEP, SIMPLE or other qualified plan [?](#)
- Self-employed health insurance deduction [?](#)
- Student Loan Interest Deduction [?](#)
- Educator Expense Deduction [?](#)
- Deduction for contributions to an IRA (not included in payroll deductions) [?](#)
- Health Savings Account Deduction (not included in payroll deductions) [?](#)
- Moving Expenses for Members of the Armed Services [?](#)
- Qualified Alimony paid [?](#)
- Penalty for Early Withdrawal of Savings [?](#)
- Certain business credits for reservists, performing artists, and fee-based government officials [?](#)

After analyzing data

Estimate Your Adjusted Gross Income (AGI)

In this step, we estimate your earned income and any adjustments to it. You can enter multiple jobs by selecting "Add Another".

Please select and enter your income and adjustments. Only select one item per source of income. Do not enter the same income in multiple places.

No Income

- I did not earn income [?](#)

Income

- Pre-tax wages, salary, or tips (for employment where federal income taxes are withheld) [?](#)
- Work where federal income taxes were not withheld [?](#)
- Self-employment gross income [?](#)
- Pre-tax pension or other taxable retirement benefits [?](#)
- Unemployment Compensation [?](#)
- Social Security Income or Railroad Retirement Benefits [?](#)
- A scholarship or grant that must be counted as income [?](#)
- Investment and Interest Income [?](#)
- Other types of income [?](#)

Adjustments To Income

- Student loan interest deduction [?](#)
- Qualified educator expenses [?](#)
- Deduction for contributions to an IRA that is not included in payroll deductions [?](#)
- Health Savings Account (HSA) deductions that are not included in recurring payroll deductions [?](#)
- Moving expenses for members of the armed forces [?](#)
- Alimony paid [?](#)
- Penalty for early withdrawal of savings [?](#)



Screenshot of updated AGI step with No Income option

Estimate Your Adjusted Gross Income (AGI)

In this step, we estimate your earned income and any adjustments to it. You can enter multiple jobs by selecting “Add Another”.

Please select and enter your income and adjustments. Only select one item per source of income. Do not enter the same income in multiple places.

No Income

I did not earn income [?](#)

Income

Pre-tax wages, salary, or tips (for employment where federal income taxes are withheld) [?](#)

Work where federal income taxes were not withheld [?](#)

Self-employment gross income [?](#)

Pre-tax pension or other taxable retirement benefits [?](#)

Unemployment Compensation [?](#)

Social Security Income or Railroad Retirement Benefits [?](#)

A scholarship or grant that must be counted as income [?](#)

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Adjustments To Income

Student loan interest deduction [?](#)

Qualified educator expenses [?](#)

Deduction for contributions to an IRA that is not included in payroll deductions [?](#)

Health Savings Account (HSA) deductions that are not included in recurring payroll deductions [?](#)

Moving expenses for members of the armed forces [?](#)

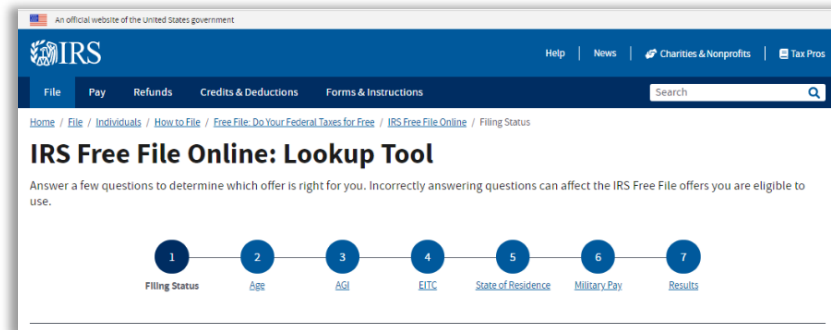
Alimony paid [?](#)

Penalty for early withdrawal of savings [?](#)

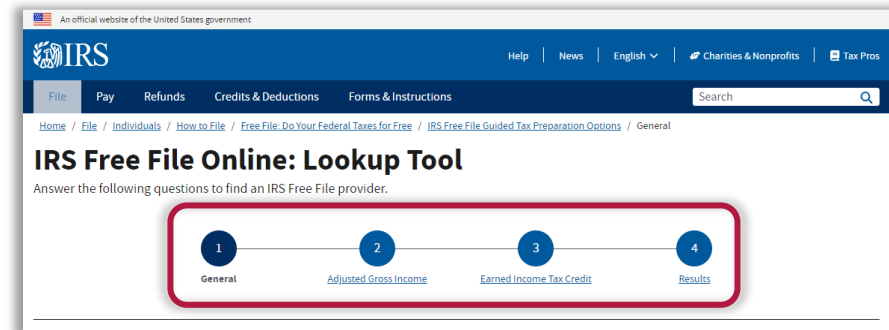


People wanted less steps in the Free File Lookup Tool

Before analyzing data



After analyzing data





Screenshot of updated IRS Free File Lookup Tool steps

An official website of the United States government

IRS

Help | News | English ▾ | Charities & Nonprofits | Tax Pros

File | Pay | Refunds | Credits & Deductions | Forms & Instructions

Search

Home / File / Individuals / How to File / Free File: Do Your Federal Taxes for Free / IRS Free File Guided Tax Preparation Options / General

IRS Free File Online: Lookup Tool

Answer the following questions to find an IRS Free File provider.

- 1
General
- 2
[Adjusted Gross Income](#)
- 3
[Earned Income Tax Credit](#)
- 4
[Results](#)



People wanted to see their answers more prominently

Before analyzing data

The screenshot shows the IRS Free File Online Lookup Tool interface before data analysis. It features a navigation bar with links for File, Pay, Refunds, Credits & Deductions, and Forms & Instructions. Below the navigation bar, there are four buttons labeled "VIEW THIS OFFER" with external link icons. A "Please Note" section explains the tool's purpose and data handling. The "Your Information:" section contains a table summarizing the user's input:

Your Information:	
Filing Status	Single
Age	23
Adjusted Gross Income	\$50,000
Earned Income	Total wages & salary: \$50,000
EITC Eligibility	Yes
State of Residence	California
2020 Military Pay	No

At the bottom, there are "START OVER" and "RETURN TO MAIN PAGE" buttons.

After analyzing data

The screenshot shows the IRS Free File Online Lookup Tool interface after data analysis. The "Your Information:" section is highlighted with a red rounded rectangle and contains an "Edit your information" button. The interface now displays three tax service offers: TaxAct, FileYourTaxes.com, and IRS Free File ezTaxi. Each offer includes a comparison table of eligibility criteria:

Service	AGI	Age	Free Fed Filing	Free State Filing	EITC	Military Pay
TaxAct	\$73,000 or less	Between the ages of 20 and 58	Any State of Residence	Free state return, for some states, if you qualify for the federal return.	Included if age and AGI criteria are met	Included
FileYourTaxes.com	Between \$8,500 and \$73,000	66 or younger	Any State of Residence	Free state return if eligible for a federal return for IA, ID, ND and VT	Included if age and AGI criteria are met	Included
IRS Free File ezTaxi	AGI	Age	Free Fed Filing	Free State Filing	EITC	Military

At the bottom, there are "Start over" and "Return to main page" buttons.



Screenshot of updated Results page

Based on the information you provided, there are 3 offers you are eligible to use. To view the list of forms and schedules available, customer support, and other services, select an offer and proceed to the partner's website for more information.

Your Information:

The information here summarizes your IRS Free File Online Lookup Tool selections.

AGI	\$70,000
Age	25
Residence	Alabama
EITC	Not Eligible
Military Pay	No
Filing	Single

[Edit your information](#)

TaxAct
IRS Free File Program

IRS Free File Program delivered by **TaxAct**

AGI	\$73,000 or less
Age	Between the ages of 20 and 58
Free Fed Filing	Any State of Residence
Free State Filing	Free state return, for some states, if you qualify for the federal return.
EITC	Included if age and AGI criteria are met
Military Pay	Included

Same criteria apply when filing with a foreign address

[View this offer](#)

FileYourTaxes.com
Free File

IRS Free File Program delivered by **FileYourTaxes.com**

AGI	Between \$8,500 and \$73,000
Age	66 or younger
Free Fed Filing	Any State of Residence
Free State Filing	Free state return if eligible for a federal return for IA, ID, ND and VT
EITC	Included if age and AGI criteria are met
Military Pay	Included

Same criteria apply when filing with a foreign address

[View this offer](#)

IRS

IRS Free F
ezTaxI

AGI	
Age	
Free Fed Filing	
Free Sta Filing	
EITC	
Military	

Important: You are responsible for determining your eligibility to use one of the IRS Free File online providers. The tool does not ask you to provide sensitive information like your name, Social Security number, address, or bank account numbers. The IRS does not save, record, or share your information. The IRS discards your information when you exit this program.

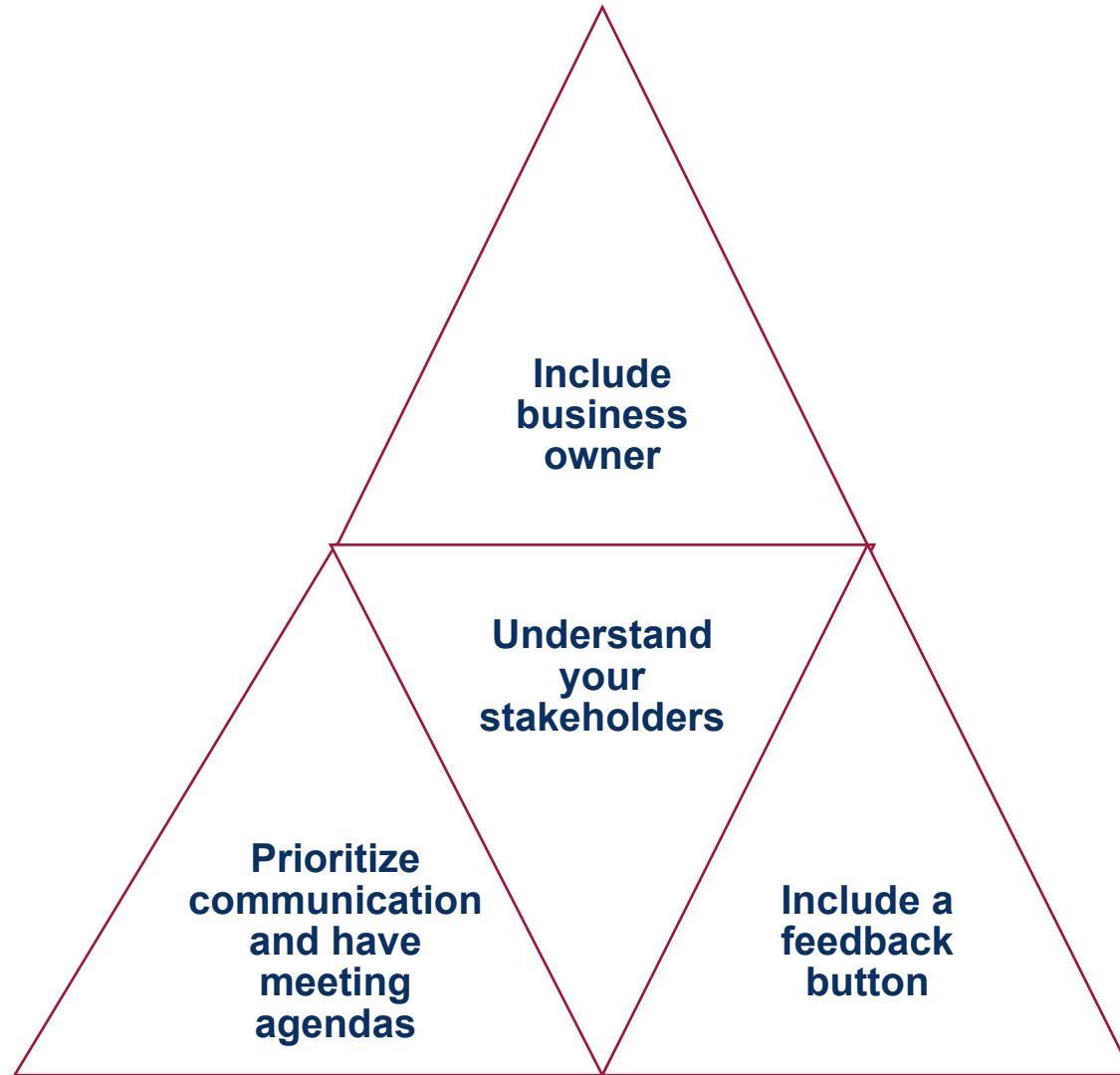
[Start over](#) [Return to main page](#)



**This experience
taught us so much**

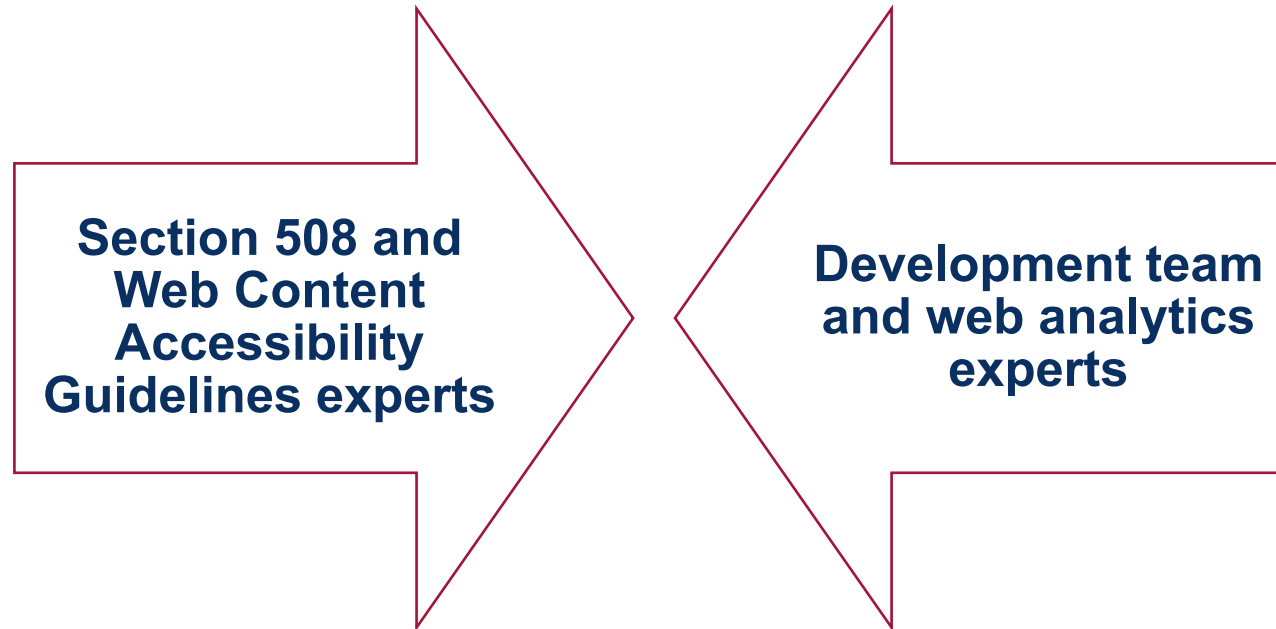


Recipe for success





More team members to consider





Important rules to follow

- **Test, test, test and test**
- **Use quotes from user testing sessions and survey responses**
- **Don't be afraid to say that something you worked on in the past needs to be improved or updated after you analyze your data**



**Thank you for joining
us today!**

Sam Chapman

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Kira Prin

Kira.Prin@irs.gov

What's Coming Up





OFFICE HOURS

Save the date: **July 20 @ noon ET**

Look for an email soon

UPCOMING TRAINING EVENTS:

Foundational Learning Path

July 13th @ 1pm - 3pm

**BETTER
TOGETHER
LEAN, AGILE &
HCD**

Register Now!

July 19th @ 10am-3pm

**Personas: Gain
Empathy for
Improved
Ideation and
Implementation**

HCD Community of Practice

- Quarterly sessions covering a wide-variety of HCD topics
- Next session: TBD
- See link in Chat for more information





Check out the [HCD Annual Trend Report 2023](https://qnetconfluence.cms.gov/display/HCD/Annual+Trend+Report+2023) and explore a series of interconnected research themes concerning market forces, societal shifts, consumer demand, and historical events that impact healthcare, as well as the insights gathered from a CCSQ community survey.

Reading Time 30 mins

<https://qnetconfluence.cms.gov/display/HCD/Annual+Trend+Report+2023>



7 Sneaky Cognitive Biases that Wreak Havoc on Innovation

Chelsea Brigg posted on May 30, 2023

7 Sneaky Cognitive Biases that Wreak Havoc on Innovation

10 min read



Introduction

Have you ever wondered why even the most brilliant projects sometimes go completely off track? The culprit might just be lurking in our own minds—cognitive biases. These sneaky mental shortcuts can wreak havoc on our ability to think objectively and sabotage collaboration. Inspired by the captivating book *"The Art of Thinking Clearly,"* I couldn't resist exploring how biases disrupt the world of innovation - especially when it comes to working together to bring new ideas to life.

<https://qnetconfluence.cms.gov/display/HCD/HCD+Blog>



Photo by [Chris Arthur-Collins](#) on [Unsplash](#)

Tell Us What You Think

Please complete a brief survey to help us make the community of practice better.

Our Gratitude

IRS Case Study Presenters:



KIRA PRIN
Product Manager,
IRS.Gov



SAM CHAPMAN
User Experience Lead for
IRS.Gov and Public User
Portal apps

Thank you!

