The Federal Tax Return Filing Status/Badge as Protected Speech

	1040		nt of the Treasury—Internal Re Individual Incor		(99) 2(011 omb	No. 1545-0074 IRS Use On	nly-Do not write or staple in this space.
	For the year Jan. 1-Dec Your first name and	c. 31, 2011,	or other tax year beginning	Last name		2011, ending	See separate instructions. Your social security number	
	If a joint return, spouse's first name and initial					Spouse's social security number		
	Home address (number and street). If you have a P.O. box, see instructions. Apt. no.							▲ Make sure the SSN(s) above
	City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).							and on line 6c are correct. Presidential Election Campaign
	Foreign country nam		and the same of th		Foreign province/c		Foreign postal code	Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or
	↓ □ Single				4			refund. You Spouse
	Filing Status Check only one	2	Married filing jointly Married filing separa			the		but not your dependent, enter this
	box.	6a	and full name here.	▶		5 🔲 Qu	alifying widow(er) with d	DOMES CHECKED
	Exemptions	b	Spouse	·	(2) Dependent's	(3) Dependent's		on 6a and 6b No. of children on 6c who:
		(1) First n		90	ocial security number	relationship to you	qualifying for child tax credi (see instructions)	e lived with you did not live with you due to divorce or separation (see instructions)
	If more than four dependents, see							Dependents on 6c
	instructions and check here ▶ □	d	Total number of ever	ptions olain	nod .			not entered above Add numbers on lines above ▶
		d	Total number of exem	ptions clain	ned			. lines above
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IRS Form 1040

Redesigning the IRS Form 1040

The Internal Revenue Service has more than 600 forms. The average person does not come in contact with most of these forms, but the few with which they do come in contact tend to do more harm than good. One of the most common forms, the IRS Form 1040 is one of those forms with apparent design flaws. For example, issues with:

- clarity of language
- organization
- necessity of information
- hierarchy
 overall understanding

Through a redesign, the form could do away with much of the information and enormous por tions of the 70+ page direction packet included

Form 1040 Label

Filing Status

Methods and Participants

We utilized two major methods in our research: surveys and video observation of users. These methods informed the research because they allowed us to reach a wide breadth of people as well as focus on individual needs regarding our form. The group of participants that we polled ranged in age from 20 to 72 years old. The large scope reflected the breadth of people who come in contact with the form.



The graph shows the correlation between completion time and age; the people who have presum-ably had experience with the form could complete it generally faster than those with less experience i.e. younger people



Hierarchy

- emphasizes differences between section titles and additional information
- leads eye through form to help show important infor-mation broadly

language help to clarify exactly what each section is asking

Original 1040 Form

with First Redesign Call Outs

Language

adjustments to

Ē

Organization

- breaking the information into clear sections helps expedite the process and makes the form less intimidating
- creating different steps creating different steps to completing the form allows people to subdi-vide their processes and understand in smaller chunks rather than the whole form at once

Individual Step Hierarchy

- breaking down the different breaking down the differer numbers into the most important sections allows people to understand the information applicable to everyone and the information that is not as commor
- helping people to understand the steps quickly allows them to understand the whole quickly
- 22 Add the amounts in column I for lines
- Educator expenses (see p. 29)
- Certain business expenses of reservists, fee based government officials. Attach Fo
- Health savings account deductions. Attac Moving Expenses. Attach Form 3903 One-half of self-employment tax. Attach 5
- Self-employed SEP, SIMPLE, and qualifie Self-employed health insurance deductio Penalty on early withdrawal of savings
- Alimony paid **b** Recipient's SSN IRA deduction (see p. 31)
- Student loan interest deduction (see p. 3-Tuition and fees deduction. Attach Form E Domestic production activities deductio
- Add amounts in column II. Subract line 36 from line 22. This is yo

Necessity of Information

- include references to other forms that are not necessarily applicable to most people
- forms regarding small businesses and/or pen sion and annuities are not applicable to most

Fall 2009 Tommy Browne - Lauren Cicozi - Pete Winslow