

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

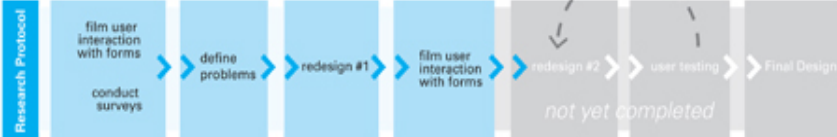
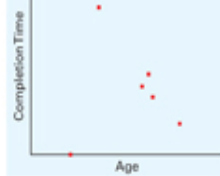
Through a redesign, the form could do away with much of the information and enormous portions of the 70+ page direction packet included with the form.

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.

Completion Time vs. Age

The graph shows the correlation between completion time and age; the people who have presumably 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 information broadly

Language

- adjustments to language help to clarify exactly what each section is asking

Original 1040 Form with First Redesign Call Outs

Organization

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

Individual Step Hierarchy

- breaking down the different numbers into the most important sections allows people to understand the information applicable to everyone and the information that is not as common
- helping people to understand the steps quickly allows them to understand the whole quickly

Necessity of Information

- many of the steps include references to other forms that are not necessarily applicable to most people
- forms regarding small businesses and/or pension and annuities are not applicable to most people