



REGULATIONS

IRS.GOV



# Navigating the IRS.gov Maze

The IRS' complex website gets hundreds of millions of visits per year. Here's how to make your visit simpler.

BY MIKE BUSHNELL

**T**he Internal Revenue Service's website has a wealth of resources for retirement plan professionals of all stripes. But with so much prominent space devoted to rules for tax filers, it can be difficult for pension professionals to find the information they need to best do their jobs. Fortunately, as the old adage says, everything is easy to find once you know where to look.

## RETIREMENT PLAN INFORMATION

First and foremost, retirement professionals can skip most of the clutter on the homepage of IRS.gov by bookmarking [IRS.gov/Retirement-Plans](https://www.irs.gov/Retirement-Plans), the "Retirement Plans" landing page. Then with just one click you can access published guidance, interest rate and actuarial tables,

required forms, the latest news updates, and much more. Unfortunately, the link to this page is not prominent on the main IRS.gov homepage; visitors can find a link by hovering over the "Information For..." tab at the top far right corner of each page, but it is not particularly intuitive.

Once on the Retirement Plans landing page, ASPPA members will find two blue boxes containing the vast majority of the page's content. The boxes break up the information into two audiences: Resources for Individuals and Retirement Plan Administration. Under the latter box, there are three columns; the first ("Choosing Your Plan") features information about retirement plans for all kinds of employers and workers, while the second ("Maintaining Your Plan") has guidance on operating and maintaining plans, pertinent tables, and other resources for benefits

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practitioners, including plan language resources, an audit process guide and more.

The third column, “Filing and Reporting Requirements,” serves as a gateway to all kinds of pertinent forms and publications, including Forms 5500 and 5330, guidance on basic reporting and disclosure rules, and much more. The column also has links for both individuals and plan sponsors to find guidance on how to report retirement plan transactions.

#### **ACCESSING RELEVANT DOCUMENTS**

From anywhere on the site, visitors may also access the forms and publications directly by clicking the “Forms & Pubs” link on the top gray navigation tab directly below the search bar. You can also enter [IRS.gov/Forms-&-Pubs](http://IRS.gov/Forms-&-Pubs) to reach the same place. While it’s certainly not the most intuitive process, plan professionals do actually have a few different ways of accessing the resources and guidance they need with a limited number of steps.

The Forms and Publications

home page features the most popular IRS documents for individuals and businesses; visitors can also click the blue button in the center of the page that says “Find All Current Forms & Pubs” to access a complete list of IRS publications for all audiences.

On the left side of the main landing page, there is an index of publication-related information, including electronic books, summaries of recent changes to IRS forms, documents from the prior year, a link to order official hard copies of IRS forms by mail, and more. The site is currently beta testing a “Current Forms & Publications Search,” allowing visitors to directly look up specific forms without having to click around the site. Visitors can access the search function by clicking the link in the green box prominently displayed above the featured forms on the main Forms and Publications landing page.

#### **RESOURCE LIBRARY**

ASPPA members will also find the “Help & Resources” tab to be very useful; you can find it located to the right of “Forms & Pubs” on the gray navigation tab on the top of the page, or in the gray footer of each page underneath the “Our Agency” column, located furthest to the left, three selections down. You can also visit the page directly at [IRS.gov/Help-&-Resources](http://IRS.gov/Help-&-Resources).

On the main Help and Resources page, visitors should first look to the left side to find a link to the Interactive Tax Assistant, designed to help people walk through multi-layered questions they might have about anything IRS-related. Underneath that link is a column titled “Additional Resources,” which allows visitors to view a wealth of pertinent guidance in two or less steps, including a glossary of tax topics, an index of filing options, and a search function for the full Internal Revenue Code.

At the bottom of the main Help and Resources page, there are two

## **Don’t Touch That Keyboard!**

A printed magazine isn’t exactly the optimal format for an article about how to navigate a website. So we have posted this column on ASPPA Net, at <http://asppa-net.org/IRSWebsite>, with hyperlinks to all of the web pages highlighted in yellow.

black boxes; the one on the right, titled “Contact Us,” features links for visitors to find their local IRS offices, to contact the taxpayer advocate, and a link to reach out to someone at the IRS about troubles they’re having accessing content on the website. So, for what it’s worth, at least the IRS knows their site isn’t the simplest to navigate.

[IRS.gov](http://IRS.gov) is the most popular U.S. government website during tax season, and even in the middle of the summer it is the third-most popular federally funded site, according to the Office of Management and Budget’s Digital Analytics Program. With so many visitors needing so many different resources, and so few plan professionals relative to the number of individual tax filers, it’s no wonder the information ASPPA members need is so scattered. But with this guide, and perhaps a little patience, pension professionals can get what they need without pinning for the days of actuarial punch cards. **PC**



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