



SOI Projections Team's Tax Stats Redesign Proposal

Presentation to the 2024 SOI Consultants Panel

July 26, 2024



Presentation Outline

1. Motivation for the Proposal
2. Two Examples of the Current Projections Webpages
3. Proposed Web Layout for the Five Projections Publications
4. Next Steps

The screenshot shows the IRS website's navigation bar with links for File, Pay, Refunds, Credits & Deductions, and Forms & Instructions. A search bar is located on the right. The main content area is titled "Projections Publications" and lists several publications with brief descriptions:

- Calendar Year Projections of Information and Withholding Documents for the United States and IRS Campuses (Publication 6961)**: IRS Publication 6961 is revised annually to update detailed calendar year projections of information and withholding documents to be filed at the U.S. and campus levels. Projections are also available by submission method. The projections incorporate the latest changes in legal, regulatory, administrative, and recent filing experiences.
- Fiscal Year Return Projections for the United States (Publication 6292)**: IRS Publication 6292 contains multi-year projections of the number of tax returns to be filed with the IRS by fiscal year of filing. The publication includes detailed projections by approximately 50 different individual, business, and tax-exempt return types, such as Form 1040, Form 1120, Form 941 and Form 990. There is also additional detail by medium of filing (paper versus electronic) and by IRS business operating division categorizations.
- Calendar Year Projections of Individual Returns by Major Processing Categories, Selected Years and Areas (Publication 6187)**: IRS Publication 6187 contains multi-year projections of the number of individual Form 1040 series returns to be filed with the IRS by major processing categories important to IRS planning operations. This includes detail by form type (Forms 1040, 1040A, and 1040EZ), by medium of filing (paper versus electronic), and by other characteristics, such as refund returns. Selected portions of the forecasts are also shown by IRS processing campus location and by State.
- Calendar Year Return Projections for the United States and IRS Campuses (Publication 6186)**: IRS Publication 6186 contains multi-year projections of the number of tax returns to be filed with the IRS by the calendar year of filing. The publication includes detailed projections by approximately 50 different individual, business, and tax-exempt return types, such as Form 1040, Form 1120, Form 941, and Form 990. There is also additional detail by medium of filing (paper versus electronic) and by IRS processing campus location.
- Calendar Year Return Projections by State (Publication 6149)**: IRS Publication 6149 contains multi-year projections of the number of tax returns to be filed with the IRS by state—as determined by the addresses on the tax returns. The publication includes detailed projections by approximately 50 different individual, business and tax-exempt return types such as Form 1040, Form 1120, Form 941 and Form 990. There is also additional detail by medium of filing (paper versus electronic).



(1) Motivation for the Proposal

The redesign proposal was crafted to accomplish the following goals for the Projections Webpages on Tax Stats:

- Standardize the webpages for SOI's five Projections publications
- Improve the layout of the webpages to make them easier to navigate
- Adhere to the existing Section 508 Compliance rules



(2a) Current Tax Stats Webpage – Publication 6961

Example 1

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

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

Home / Our Agency / Tax Statistics / Products and Publications / Projections Publications / SOI Tax Stats - Calendar Year Projections, Publication 6961

SOI Tax Stats - Calendar Year Projections, Publication 6961

- IRS Organization
- A Closer Look
- Financial and Budget Reports
- Tax Statistics**
 - Products and Publications
 - Statistics of Income Bulletins
 - Projections Publications**
 - Corporation Complete Reports
 - Corporation Source Books
 - Corporation Income Tax Returns Line Item Estimates
 - Partnership Returns Line Item Estimates

[Calendar Year Projections of Information and Withholding Documents for the United States and IRS Campuses, 2023](#) PDF

Publication 6961 (Revised 9/2023)

- [2022](#) PDF
- [2021](#) PDF
- [2020](#) PDF
- [2019](#) PDF
- [2018](#) PDF
- [2017](#) PDF
- [2016](#) PDF
- [2015](#) PDF
- [2014](#) PDF
- [2013](#) PDF
- [2012](#) PDF
- [2011](#) PDF
- [2010](#) PDF
- [2009](#) PDF
- [2008](#) PDF
- [2007](#) PDF
- [2006](#) PDF
- [2005](#) PDF

[Publication 6961 One Sheet](#) PDF

Publication 6961 is revised annually to update detailed calendar year projections of information and withholding documents to be filed at the U.S. and campus levels. Projections are also available by submission method. The projections incorporate the latest changes in legal, regulatory, administrative, and recent filing experiences.

Related Tables:

- [Tables 1 through 7](#) XLSX

Historical Tables:

Calendar Years: 2005–2021

- [Historical Publication 6961 Tables](#) XLSX

Publication's Description

Excel Tables

Historical Data

Title and Full Publication

Past Updates

One Sheet Summary



(2b) Current Tax Stats Webpage – Publication 6186

Example 2

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

Home / Our Agency / Tax Statistics / Products and Publications / Projections Publications / SOI Tax Stats - Calendar Year Projections, Publication 6186

SOI Tax Stats - Calendar Year Projections, Publication 6186

- IRS Organization
- A Closer Look
- Financial and Budget Reports
- Tax Statistics**
 - Products and Publications
 - Statistics of Income Bulletins
 - Projections Publications**
 - Corporation Complete Reports
 - Corporation Source Books
 - Corporation Income Tax Returns Line Item Estimates
 - Partnership Returns Line Item Estimates

Calendar Year Return Projections for the United States and IRS Campuses, 2023

Publication 6186 (Revised 12/23)

- 2022 PDF
- 2021 PDF
- 2020 PDF
- 2019 PDF
- 2018 PDF
- 2017 PDF
- 2016 PDF
- 2015 PDF
- 2014 PDF
- 2013 PDF
- 2012 PDF
- 2011 PDF
- 2010 PDF
- 2009 PDF
- 2008 PDF
- 2007 PDF
- 2006 PDF

Title and Full Publication

Past Updates

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

One Sheet Summary

- 2005 PDF
- Individual Complete Reports
- Individual Income Tax Returns Line Item Estimates
- Publication 6186 OneSheet PDF

IRS Publication 6186 contains multi-year projections of the number of tax returns to be filed with the IRS by the calendar year of filing. The publication includes detailed projections by approximately 50 different individual, business, and tax-exempt return types, such as Form 1040, Form 1120, Form 941, and Form 990. There is also additional detail by medium of filing (paper versus electronic) and by IRS processing campus location.

Publication's Description

Related Tables

- Tables 1 through 11 XLSX

Excel Tables

Historical Tables

Calendar Years: 2005-2021

- Historical Publication 6186 Tables XLSX

Historical Data



(3) Proposed Web Layout for the Five Projections Publications

- Publication's Title
- Publication's Description
- Current Publication Update (Revision Date)
 - Full Publication (pdf)
 - Publication's One Sheet Summary (pdf)
 - Publication's Tables (xlsx)
- Past Publication Updates
- Historical Data
 - Table of Historical Volumes for Publication XXXX (xlsx)

Goal: Rearrange the contents to make the webpage easier to navigate.



(3a) Current Tax Stats Webpage – Publication 6961

Example 1

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

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

Home / Our Agency / Tax Statistics / Products and Publications / Projections Publications / SOI Tax Stats - Calendar Year Projections, Publication 6961

SOI Tax Stats - Calendar Year Projections, Publication 6961

- IRS Organization
- A Closer Look
- Financial and Budget Reports
- Tax Statistics**
 - Products and Publications
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 - Corporation Complete Reports
 - Corporation Source Books
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[Calendar Year Projections of Information and Withholding Documents for the United States and IRS Campuses, 2023](#) PDF

Publication 6961 (Revised 9/2023)

- 2022 PDF
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- 2020 PDF
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- 2017 PDF
- 2016 PDF
- 2015 PDF
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- 2009 PDF
- 2008 PDF
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- 2006 PDF
- 2005 PDF

[Publication 6961 One Sheet](#) PDF

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- [Tables 1 through 7](#) XLSX

Historical Tables:

- Calendar Years: 2005–2021
- [Historical Publication 6961 Tables](#) XLSX

Goal: Rearrange the contents to make the webpage easier to navigate



(3a) Proposed Tax Stats Webpage – Publication 6961

Example 1

Calendar Year Projections of Information and Withholding Documents for the United States and IRS Campuses

IRS Publication 6961 is revised annually to update detailed calendar year projections of information and withholding documents to be filed at the U.S. and campus levels. Projections are also available by submission method. The projections incorporate the latest changes in legal, regulatory, administrative, and recent filing experiences.

Current Publication 6961 Update (Revised September 2023):

- [Full Publication](#) PDF
- [Publication’s One Sheet Summary](#) PDF
- [Publication’s Tables](#) XLSX

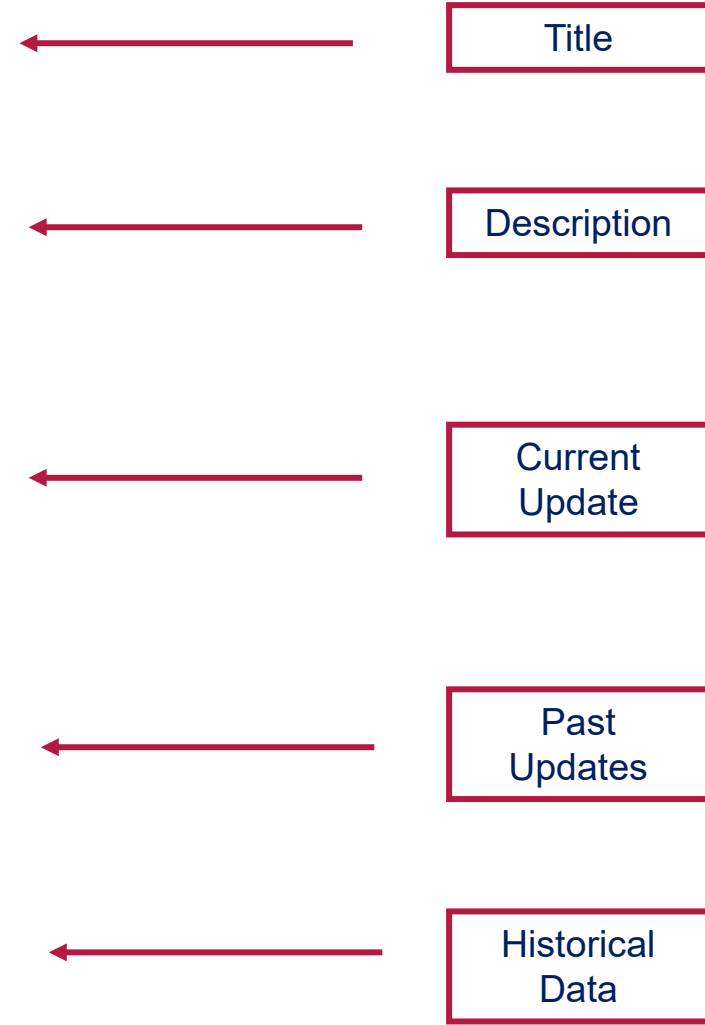
Past Publication 6961 Updates:

- [2022](#) PDF [2021](#) PDF [2020](#) PDF [2019](#) PDF [2018](#) PDF [2017](#) PDF [2016](#) PDF [2015](#) PDF [2014](#) PDF
- [2013](#) PDF [2012](#) PDF [2011](#) PDF [2010](#) PDF [2009](#) PDF [2008](#) PDF [2007](#) PDF [2006](#) PDF [2005](#) PDF

Historical Publication 6961 Data:

Calendar Years: 2005–2021

- [Table of Historical Volumes for Publication 6186](#) XLSX





(3b) Current Tax Stats Webpage – Publication 6186

Example 2

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

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

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

Home / Our Agency / Tax Statistics / Products and Publications / Projections Publications / SOI Tax Stats - Calendar Year Projections, Publication 6186

SOI Tax Stats - Calendar Year Projections, Publication 6186

- IRS Organization
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- Tax Statistics**
 - Products and Publications
 - Statistics of Income Bulletins
 - Projections Publications**
 - Corporation Complete Reports
 - Corporation Source Books
 - Corporation Income Tax Returns Line Item Estimates
 - Partnership Returns Line Item Estimates

[Calendar Year Return Projections for the United States and IRS Campuses, 2023](#) PDF

Publication 6186 (Revised 12/23)

- 2022 PDF
- 2021 PDF
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- 2006 PDF

- Individual Complete Reports
- Individual Income Tax Returns Line Item Estimates
- Compendium of Studies of Tax-Exempt Organizations
- Program Documentation Data Items by Forms and Schedules
- IRS Research Conference and Bulletins
- Statistics of Income Publications Archive
- Historical Data Tables
- Statistics of Income Working Papers

• [2005](#) PDF

[Publication 6186 OneSheet](#) PDF

IRS Publication 6186 contains multi-year projections of the number of tax returns to be filed with the IRS by the calendar year of filing. The publication includes detailed projections by approximately 50 different individual, business, and tax-exempt return types, such as Form 1040, Form 1120, Form 941, and Form 990. There is also additional detail by medium of filing (paper versus electronic) and by IRS processing campus location.

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Historical Tables

Calendar Years: 2005-2021

- [Historical Publication 6186 Tables](#) XLSX

Goal: Rearrange the contents to make the webpage easier to navigate



(3b) Proposed Tax Stats Webpage – Publication 6186

Example 2

Calendar Year Return Projections for the United States and IRS Campuses

IRS Publication 6186 contains multi-year projections of the number of tax returns to be filed with the IRS by the calendar year of filing. The publication includes detailed projections by approximately 50 different individual, business, and tax-exempt return types, such as Form 1040, Form 1120, Form 941, and Form 990. There is also additional detail by medium of filing (paper versus electronic) and by IRS processing campus location.

Current Publication 6186 Update (Revised December 2023):

- [Full Publication](#) PDF
- [Publication’s One Sheet Summary](#) PDF
- [Publication’s Tables](#) XLSX

Past Publication 6186 Updates:

- [2022](#) PDF
[2021](#) PDF
[2020](#) PDF
[2019](#) PDF
[2018](#) PDF
[2017](#) PDF
[2016](#) PDF
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[2010](#) PDF
[2009](#) PDF
[2008](#) PDF
[2007](#) PDF
[2006](#) PDF
[2005](#) PDF

Historical Publication 6186 Data:

Calendar Years: 2005–2021

- [Table of Historical Volumes for Publication 6186](#) XLSX



Title



Description



Current Update



Past Updates



Historical Data





(4) Next Steps

- SOI is currently working with the Online Services Division of the IRS to finalize the proposed webpage layouts for the five Projections publications.
- We hope to launch the live versions of the proposed layouts by the end of FY 2024.
- We also note that there are many administrative steps that must be taken before the proposed layouts can be formally implemented.