# SOI Tax Stats Modernization

Presentation to the 2024 SOI Consultants Panel

July 26, 2024

## SOI Tax Stats Modernization

- Our webpage was initially launched in 1996 with incremental improvements over the past 28 years.

- Currently, a strategic plan is being implemented to modernize and update our website.

- Today you will learn about some of our plans.

- You will be introduced to the teams involved.

- We will tell you how we plan to implement some of our initial changes.

# Modernization Goals

## Goals to Modernize and Improve Tax Stats:

- Increase graphics to make our webpages more engaging, attract new customers, and engage current customers who are less data savvy.

- Improve information architecture and page design so information is presented in an intuitive way that improves navigability and enables users to more easily find information.

- Increase data visualizations and add APIs (Application Programming Interfaces) so more advanced users can leverage our data.

- Explore distinctive branding to strengthen the SOI brand as a federal statistical agency.

- Improve engagement internally with Subject Matter Experts to ensure that our modernization efforts are continually reviewed and improved.

- Engage our most trusted customers for continual feedback to make ongoing improvements.

# NERG (New Employee Resource Group) Working Group

Comprised of newer SOI employees who are less familiar with our Tax Stats webpages but provide a fresh perspective.

**Members:**

- Musowa Akoma
- Mac Christensen
- Kelvin Eyifa
- Abigail Gaudinier
- Jessica Greer
- William LaFiandra
- Daniel Martinez
- William Moulding
- William Pullum
- Samuel Shreeve

**Activities:**

- Research other federal statistical agencies' webpages for visual feedback to point to specific elements (such as buttons, layout, images) that may be incorporated into our webpages.

- Perform session recording exercises using Tax Stats to answer typical questions received by SOI's Statistical Information Services office. NERG members recorded their interactions on the webpages, as well as verbalized their thoughts when trying to find the answers.

- Look into how other federal statistical agency's disseminate and present research articles and data on their websites.

# SOI Working Groups

## SOI Leadership Working Group

Comprised of senior SOI employees who are very familiar with their subject matter webpages.

**Members:**

- Derrick Dennis
- Wayne Kei
- Joe Koshansky
- Clay Moulton
- Mike Parisi

**Activities:**

- Provide guidance on possible areas of improvement across their respective subject-matter webpages.

- Coordinate suggested updates with other Subject Matter Experts across their Branch to get appropriate feedback on potential changes.

- Provide overall guidance on implementing potential changes by identifying issues and recommending alternative solutions.

- Hold weekly meetings with Online Services technical experts to provide input and expertise on specific Tax Stats webpages.

# SOI Senior Leadership Working Group

Comprised of higher-level senior SOI employees who are very familiar with their subject-matter webpages to provide vision and direction.

**Members:**

- Brian Balkovic
- Victoria Bryant
- Karl Hinds

**Activities:**

- Coordinate with Senior Leadership at Online Services to facilitate critical changes and ensure there are no roadblocks that would prevent success.

- Provide overall leadership on overall direction by sharing vision and ensuring solutions are implemented.

- Support the working groups, provide advice on proposed changes, and suggest other enhancements based on IRS-wide standards.

## Modernization Phases

**Phase 1:** Standardize a web layout that may be utilized across various subject matter webpages.
- Begin with Projections webpages.
- Plan to incorporate a similar layout for other Tax Stats webpages.

**Phase 2:** Improve how we organize and present research articles.
- Determine frequency and format for SOI Bulletin articles.
- Upgrade presentation of other research publications, such as the IRS Research Bulletin and Working Papers.

**Phase 3 (part 1):** Update our Individuals Income Tax Statistics and Corporations Income Tax Statistics Complete Report webpages.
- Implement improvements, such as congruent layouts.
- Add static data visualizations.

**Phase 3 (part 2**):Engage SOI employees on new webpage updates to ensure accuracy and timeliness.

# SOI Projections Team's
# Tax Stats Redesign Proposal

Presentation to the 2024 SOI Consultants Panel
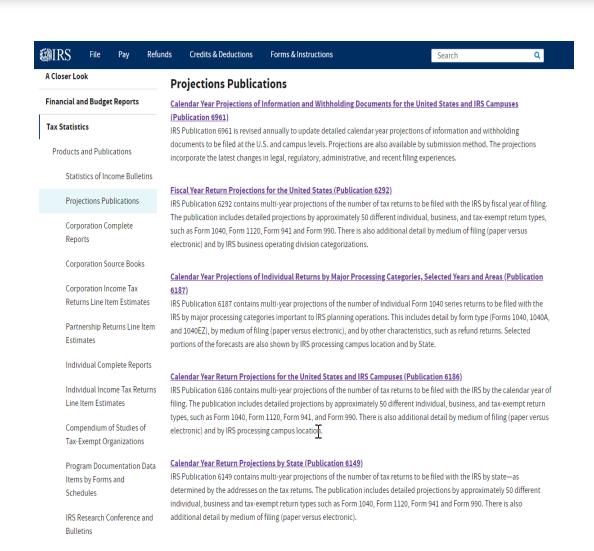
July 26, 2024

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

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

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

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

**Projections Publications**

**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

Screenshot of IRS SOI Tax Stats - Calendar Year Projections, Publication 6961 webpage with annotations:

- **Title and Full Publication** → pointing to "Calendar Year Projections of Information and Withholding Documents for the United States and IRS Campuses, 2023 [PDF]"
- **Past Updates** → pointing to the list of years 2022–2005 with PDF links
- **Publication's Description** → pointing to "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..."
- **One Sheet Summary** → pointing to "Publication 6961 One Sheet [PDF]"
- **Excel Tables** → pointing to "Tables 1 through 7 [XLSX]"
- **Historical Data** → pointing to "Historical Publication 6961 Tables [XLSX]"
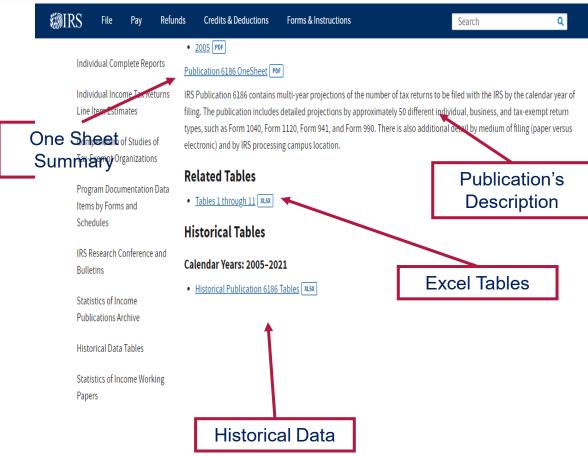
Webpage content shown:

Breadcrumb: 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**

Sidebar navigation:
- 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]

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Title and Full Publication

Past Updates

One Sheet Summary

Publication's Description

Excel Tables

Historical Data

- Publication's Title

- Publication's Description

- Current Publication Update (Revision Date)

  - ❑ Full Publication (pdf)

  - ❑ Publication's One Sheet Summary (pdf)

  - ❑ Publication's Tables (xlsx)
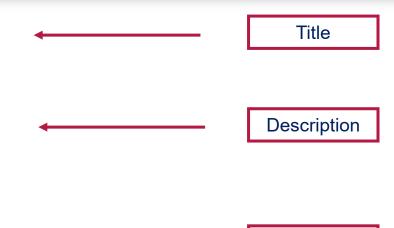
- Past Publication Updates

- Historical Data

  - ❑ Table of Historical Volumes for Publication XXXX (xlsx)

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

**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]

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

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### 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]

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

## Calendar Year Return Projections for the United States and IRS Campuses

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**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`   2015 `PDF`   2014 `PDF`

2013 `PDF`   2012 `PDF`   2011 `PDF`   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 |

- 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.