



DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
WASHINGTON, D.C. 20224

July 23, 2007

MEMORANDUM

FROM:

Janice M. Hedemann *Janice M. Hedemann*
Director, Office of Research RAS:R

SUBJECT: Calendar Year Projections of Information and Withholding Documents
(2007 - 2015)

This memorandum formally transmits calendar year (2007-2015) projections of information and withholding documents on an annual basis. The information and withholding document projections contained herein are used primarily by the IRS operational and resource planning functions to assist in the formulation of their budget submissions and staffing requirements, and to complete various other analyses. Enacted tax law changes and confirmed administrative plans are reflected in these projections. However, legislative or administrative initiatives simply under consideration are generally not used to adjust the projections due to the uncertain nature of their eventual outcome.

A comparison of projections for filing year 2008 made in 2006 versus the current update is contained in Table 1. This table compares both the "all media grand total" and "paper" components. Table 2 contains the U.S. level projections through calendar year (CY) 2015 for the grand total volumes for "all media". The U.S. forecasts for the "paper" segment are provided in Table 3, while Table 4 presents the "non-paper" component.

Detailed breakouts for the paper component at the IRS processing campus level are provided in Tables 5A through 5E. The current alignment of states by IRS processing campus for paper Schedules K-1 is presented in Table 6, and Table 7 contains the current alignment of states by processing campus for the other paper documents. The listed alignments are reflected at the campus level projections for the entire forecast horizon, although changes may occur in the future. Subsequent to the alignment tables, we have provided definitions of the forms projected, as well as the methodology we used to forecast these items.

Electronic versions of this memorandum and the tables will also be placed on the TaxStats website. Please feel free to call Taukir Hussain of Forecasting and Service Analysis at (202) 874-0585 if you have any questions.

Attachment

**Table 1. Comparison of Projections Made in 2006 vs 2007
for Calendar Year 2008: All Media Grand Total and Paper Only
(Data in thousands)**

Form	All Media Grand Total				Paper Only			
	2008 Projections		Net Change	Percent Change	2008 Projections		Net Change	Percent Change
	Made in 2006	Made in 2007*			Made in 2006	Made in 2007*		
Grand Total	1,588,898	1,626,090	37,192	2.3%	58,583	59,005	422	0.7%
Total	255,425	253,565	(1,860)	-0.7%	75	90	16	21.1%
W-2	244,719	243,428	(1,291)	-0.5%	0	0	0	n.a.
W-2G	10,706	10,137	(569)	-5.3%	75	90	16	21.1%
Total	1,333,473	1,372,525	39,052	2.9%	58,509	58,915	406	0.7%
K-1 (Form 1041)	2,981	3,237	256	8.6%	2,230	2,337	107	4.8%
K-1 (Form 1065)	15,971	16,965	993	6.2%	9,178	9,925	747	8.1%
K-1 (Form 1120-S)	6,699	6,771	72	1.1%	4,093	4,208	115	2.8%
Foreign	1,962	1,931	(31)	-1.6%	0	0	0	n.a.
SSA/RRB-1099	53,274	54,065	791	1.5%	0	0	0	n.a.
1096	5,794	5,688	(105)	-1.8%	5,794	5,688	(105)	-1.8%
1042-S	3,356	3,388	32	1.0%	209	159	(50)	-24.0%
1098	115,042	110,919	(4,123)	-3.6%	742	725	(17)	-2.3%
1098-E	20,180	20,529	349	1.7%	13	10	(3)	-22.1%
1098-T	26,435	24,818	(1,617)	-6.1%	286	254	(32)	-11.2%
1099-A	451	405	(47)	-10.3%	5	4	(1)	-20.0%
1099-B	402,532	436,008	33,477	8.3%	62	62	(0)	-0.1%
1099-C	1,625	2,175	549	33.8%	28	32	4	14.0%
1099-DIV	115,319	117,137	1,818	1.6%	463	419	(45)	-9.6%
1099-G	81,333	80,936	(397)	-0.5%	59	55	(3)	-5.4%
1099-H	70	55	(16)	-22.3%	0	0	0	n.a.
1099-INT	194,700	201,971	7,271	3.7%	1,046	981	(65)	-6.2%
1099-LTC	249	247	(2)	-0.6%	17	17	0	2.7%
1099-MISC	81,727	82,661	935	1.1%	32,718	32,444	(273)	-0.8%
1099-OID	3,571	3,143	(428)	-12.0%	7	7	(1)	-6.9%
1099-PATR	1,185	1,236	51	4.3%	43	52	8	19.3%
1099-Q	1,015	1,196	182	17.9%	1	2	1	117.5%
1099-R	77,752	79,493	1,740	2.2%	661	639	(22)	-3.4%
1099-S	3,736	3,933	196	5.2%	826	862	36	4.4%
1099-SA (formerly MSA)	337	579	241	71.5%	2	4	2	109.1%
5498	114,675	111,163	(3,511)	-3.1%	26	24	(2)	-8.8%
5498-ESA	1,054	991	(64)	-6.0%	0	0	0	56.1%
5498-SA (formerly MSA)	450	888	439	97.6%	2	6	4	204.9%

Notes:

Negative values (numbers in parentheses) indicate projections that have been lowered.

Detail may not add to total due to rounding.

*1098-C, 1098-CAP and CTRs are not included in Table 1

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Table 2. Projections of Information and Withholding Documents United States All Media Grand Total: Calendar Years 2007 to 2015										
Form	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Grand Total (1)	1,549,714,235	1,595,124,000	1,626,208,400	1,658,091,300	1,690,596,300	1,723,508,400	1,757,330,200	1,791,450,100	1,825,794,000	1,860,494,900
Subtotal	247,558,823	250,363,100	253,565,100	256,748,500	259,913,400	263,059,900	266,188,300	269,298,500	272,390,900	275,465,300
W-2	238,188,634	240,815,800	243,428,100	246,021,900	248,597,100	251,154,000	253,692,700	256,213,300	258,716,000	261,200,800
W-2G	9,370,189	9,547,300	10,137,000	10,726,600	11,316,300	11,905,900	12,495,600	13,085,200	13,674,900	14,264,500
Subtotal	1,302,155,412	1,344,760,900	1,372,643,300	1,401,342,800	1,430,682,900	1,460,448,500	1,491,141,900	1,522,151,600	1,553,403,100	1,585,029,600
K-1 (Form 1041)	3,448,082	3,342,600	3,237,200	3,131,700	3,026,200	2,920,800	2,815,300	2,709,800	2,604,400	2,498,900
K-1 (Form 1065)	16,618,979	16,756,000	16,964,700	17,173,400	17,382,100	17,590,900	17,799,600	18,008,300	18,217,000	18,425,700
K-1 (Form 1120-S)	6,425,163	6,549,900	6,771,100	6,979,500	7,175,900	7,367,000	7,562,100	7,780,900	8,023,400	8,283,500
Foreign	1,164,922	1,880,100	1,931,000	1,981,900	2,032,800	2,083,700	2,134,600	2,185,500	2,236,400	2,287,200
SSA/RRB-1099	52,059,705	53,178,500	54,064,600	55,368,600	56,727,300	58,110,600	59,596,800	61,245,800	62,943,100	64,677,800
1096	5,607,475	5,647,800	5,688,400	5,729,300	5,770,500	5,812,000	5,853,800	5,895,900	5,938,300	5,980,900
1042-S	3,365,127	3,345,200	3,387,900	3,451,100	3,521,200	3,593,500	3,666,500	3,739,800	3,813,100	3,886,500
1098	103,518,943	107,102,200	110,919,100	114,841,000	118,872,400	123,017,600	127,281,200	131,668,000	136,183,000	140,831,300
1098-C	114,578	115,300	115,800	116,300	116,700	117,000	117,300	117,600	117,800	118,000
1098-E	18,531,406	19,583,100	20,528,600	21,474,100	22,419,600	23,365,100	24,310,500	25,256,000	26,201,500	27,147,000
1098-T	23,889,771	24,349,400	24,817,800	25,295,200	25,781,800	26,277,700	26,783,200	27,298,400	27,823,600	28,358,800
1099-A	386,954	395,900	404,600	413,300	421,800	430,300	438,600	446,800	454,900	462,800
1099-B	399,244,529	417,620,500	436,008,400	454,396,200	472,784,100	491,172,000	509,559,800	527,947,700	546,335,600	564,723,400
1099-C	1,942,694	2,058,600	2,174,600	2,290,700	2,406,700	2,522,700	2,638,700	2,754,800	2,870,800	2,986,800
1099-CAP	2,385	2,400	2,400	2,400	2,500	2,500	2,500	2,500	2,500	2,600
1099-DIV	103,284,316	116,196,600	117,136,600	118,084,200	119,039,400	120,002,400	120,973,200	121,951,900	122,938,400	123,933,000
1099-G	74,630,711	78,606,800	80,935,500	83,333,300	85,802,100	88,344,000	90,961,300	93,656,100	96,430,700	99,287,500
1099-H	22,948	38,700	54,700	68,500	82,500	97,500	109,700	120,600	128,100	132,300
1099-INT	216,256,251	209,111,800	201,970,700	194,829,700	187,688,700	180,547,600	173,406,600	166,265,500	159,124,500	151,983,500
1099-LTC	204,890	232,600	247,100	270,300	279,600	304,800	320,500	341,700	354,700	376,800
1099-MISC	81,832,803	82,191,000	82,661,200	83,131,500	83,601,800	84,072,100	84,542,400	85,012,600	85,482,900	85,953,200
1099-OID	3,420,937	3,282,200	3,143,200	3,004,100	2,865,100	2,726,100	2,587,000	2,448,000	2,309,000	2,169,900
1099-PATR	1,516,861	1,296,300	1,235,600	1,175,900	1,117,200	1,059,400	1,002,600	946,700	891,700	837,400
1099-Q	840,881	1,018,700	1,196,400	1,374,200	1,552,000	1,729,800	1,907,600	2,085,300	2,263,100	2,440,900
1099-R	72,872,920	76,782,000	79,492,700	82,164,400	84,831,600	87,738,900	91,182,100	94,648,100	98,081,300	101,580,600
1099-S	5,169,117	4,399,100	3,932,500	3,700,800	3,880,000	3,981,500	4,124,100	4,147,900	4,161,400	4,183,500
1099-SA	503,661	522,500	578,700	634,900	691,100	747,400	803,600	859,800	916,000	972,200
5498	103,621,204	107,394,300	111,163,400	114,932,500	118,701,700	122,470,800	126,239,900	130,009,000	133,778,100	137,547,300
5498-ESA	923,336	957,000	990,500	1,024,100	1,057,700	1,091,300	1,124,900	1,158,500	1,192,100	1,225,600
5498-SA	733,863	803,800	888,300	969,700	1,050,800	1,151,500	1,295,900	1,442,100	1,585,700	1,734,700
Currency Transaction Reports (2)	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total CTR,	15,902,193	16,718,600	17,479,500	18,188,800	18,850,600	19,468,600	20,046,200	20,586,700	21,092,800	21,567,600
FinCen 104 (formerly 4789)	15,000,603	15,710,600	16,364,700	16,967,200	17,522,100	18,033,200	18,504,000	18,937,600	19,336,900	19,704,800
8300	164,844	171,300	177,800	184,300	190,900	197,400	203,900	210,500	217,000	223,500
FinCen 103 (formerly 8362/8852)	736,746	836,700	937,000	1,037,300	1,137,600	1,238,000	1,338,300	1,438,600	1,538,900	1,639,300

Notes:

(1) Grand Total includes Form 1096 which is a "payer" transmittal document used to transmit "payee" documents.

(2) Currency Transaction Report volumes are listed separately and not included in Grand Total.

"N.A." signifies that data is not available since relevant program areas have not yet commenced.

5498-MSA and 1099-MSA are now obsolete and replaced by Forms 5498-SA and 1099-SA

Detail may not add to total due to rounding.

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**Table 3. Projections of Information and Withholding Documents
United States Paper Total: Calendar Years 2007 to 2015**

Form	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total, Paper (1)	61,475,261	60,073,000	59,059,400	58,397,300	58,081,900	57,939,400	57,874,700	57,857,100	57,873,600	57,917,300
W-2	0	0	0	0	0	0	0	0	0	0
W-2G	95,158	88,000	90,300	92,700	95,000	97,300	99,700	102,000	104,300	106,700
Subtotal, Schedule K-1	18,774,660	17,663,800	16,469,900	15,603,900	15,062,300	14,674,000	14,343,700	14,042,900	13,758,900	13,485,000
K-1 (Form 1041)	2,495,317	2,412,100	2,337,200	2,262,300	2,187,400	2,112,500	2,037,600	1,962,700	1,887,800	1,812,900
K-1 (Form 1065)	10,597,529	10,241,400	9,924,700	9,607,900	9,291,200	8,974,500	8,657,800	8,341,100	8,024,300	7,707,600
K-1 (Form 1120-S)	5,681,814	5,010,300	4,208,000	3,733,700	3,583,700	3,587,000	3,648,300	3,739,100	3,846,800	3,964,500
Foreign*	0	0	0	0	0	0	0	0	0	0
SSA/RRB-1099	0	0	0	0	0	0	0	0	0	0
1096	5,607,475	5,647,800	5,688,400	5,729,300	5,770,500	5,812,000	5,853,800	5,895,900	5,938,300	5,980,900
Subtotal, Scannable Forms	36,997,968	36,673,400	36,810,800	36,971,400	37,154,100	37,356,100	37,577,500	37,816,300	38,072,100	38,344,700
1042-S	140,990	149,900	158,700	167,600	176,400	185,300	194,200	203,000	211,900	220,700
1098	770,386	746,300	725,000	711,000	701,700	695,600	691,600	689,000	687,200	686,100
1098-C	52,610	52,900	53,200	53,400	53,600	53,700	53,900	54,000	54,100	54,200
1098-E	11,430	10,500	9,800	9,100	8,500	7,900	7,400	6,900	6,400	5,900
1098-T	287,952	246,300	254,100	270,900	296,900	332,200	377,100	431,800	496,300	571,000
1099-A	3,804	3,800	3,800	3,700	3,600	3,600	3,500	3,400	3,400	3,400
1099-B	68,443	63,500	61,600	59,700	58,000	56,400	54,800	53,400	52,000	50,700
1099-C	37,954	32,300	31,800	31,300	30,800	30,200	29,700	29,200	28,700	28,200
1099-CAP	790	800	800	800	800	800	800	800	800	800
1099-DIV	458,720	434,800	418,800	404,200	391,000	379,200	369,000	360,200	353,100	347,600
1099-G	54,388	55,000	55,400	55,700	56,100	56,600	57,000	57,500	58,000	58,600
1099-H	10	0	0	0	0	0	0	100	100	100
1099-INT	1,083,965	1,031,200	980,500	933,000	888,500	846,700	807,600	770,800	736,400	704,100
1099-LTC	15,706	15,800	17,300	18,000	19,000	19,500	20,500	21,400	22,400	23,100
1099-MISC	32,306,414	32,177,800	32,444,500	32,711,200	32,977,900	33,244,600	33,511,300	33,777,900	34,044,600	34,311,300
1099-OLD	7,607	7,400	6,900	6,400	6,000	5,500	5,000	4,500	4,100	3,600
1099-PATR	50,811	51,200	51,500	51,800	52,100	52,400	52,700	53,000	53,300	53,600
1099-Q	526	2,000	2,400	2,700	3,100	3,500	3,800	4,200	4,500	4,900
1099-R	705,844	674,500	639,100	607,100	578,300	552,300	529,100	508,300	489,800	473,400
1099-S	904,370	883,000	861,700	840,400	819,000	797,700	776,400	755,100	733,700	712,400
1099-SA	3,342	3,300	3,600	3,800	4,000	4,200	4,500	4,700	4,900	5,200
5498	25,027	24,300	23,600	23,000	22,300	21,700	21,100	20,600	20,000	19,500
5498-ESA	291	300	300	300	300	300	400	400	400	400
5498-SA	6,588	6,500	6,400	6,300	6,200	6,200	6,100	6,100	6,000	5,900
Currency Transaction Reports (2)	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total CTR, Paper	4,144,782	4,327,300	4,531,600	4,724,800	4,924,300	5,120,300	5,318,100	5,515,000	5,712,400	5,909,500
FinCen 104 (formerly 4789)	3,294,212	3,391,000	3,489,400	3,587,800	3,686,200	3,784,600	3,883,000	3,981,400	4,079,800	4,178,200
8300	164,844	171,300	177,800	184,300	190,900	197,400	203,900	210,500	217,000	223,500
FinCen 103 (formerly 8362/8852)	685,726	765,000	864,400	952,700	1,047,200	1,138,300	1,231,200	1,323,100	1,415,600	1,507,800

Notes:

(1) Total Paper includes Form 1096 which is a "payer" transmittal document used to transmit "payee" documents.

(2) Currency Transaction Report volumes are listed separately and not included in Total Paper.

5498-MSA and 1099-MSA are now obsolete and replaced by Forms 5498-SA and 1099-SA

"N.A." signifies that data is not available since relevant program areas have not yet commenced.

Detail may not add to total due to rounding.

Forecasting and Service Analysis
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**Table 4. Projections of Information and Withholding Documents
United States Non-Paper Total: Calendar Years 2007 to 2015**

Form	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total, Non-Paper (1)	1,488,238,974	1,535,050,800	1,567,149,200	1,599,694,200	1,632,514,000	1,665,568,800	1,699,455,700	1,733,593,300	1,767,920,200	1,802,578,100
W-2	238,188,634	240,815,800	243,428,100	246,021,900	248,597,100	251,154,000	253,692,700	256,213,300	258,716,000	261,200,800
W-2G	9,275,031	9,459,300	10,046,600	10,634,000	11,221,300	11,808,600	12,395,900	12,983,200	13,570,500	14,157,900
K-1 (Form 1041)	952,765	930,500	900,000	869,400	838,800	808,200	777,700	747,100	716,500	686,000
K-1 (Form 1065)	6,021,450	6,514,600	7,040,000	7,565,500	8,090,900	8,616,400	9,141,800	9,667,200	10,192,700	10,718,100
K-1 (Form 1120-S)	743,349	1,539,700	2,563,100	3,245,800	3,592,100	3,780,000	3,913,800	4,041,800	4,176,600	4,319,000
Foreign	1,164,922	1,880,100	1,931,000	1,981,900	2,032,800	2,083,700	2,134,600	2,185,500	2,236,400	2,287,200
SSA/RRB-1099	52,059,705	53,178,500	54,064,600	55,368,600	56,727,300	58,110,600	59,596,800	61,245,800	62,943,100	64,677,800
1096	0	0	0	0	0	0	0	0	0	0
1042-S	3,224,137	3,195,400	3,229,200	3,283,600	3,344,800	3,408,200	3,472,300	3,536,700	3,601,200	3,665,700
1098	102,748,557	106,355,900	110,194,000	114,130,100	118,170,700	122,322,000	126,589,600	130,979,000	135,495,700	140,145,200
1098-C	61,968	62,300	62,600	62,900	63,100	63,300	63,400	63,600	63,700	63,800
1098-E	18,519,976	19,572,500	20,518,800	21,464,900	22,411,100	23,357,100	24,303,200	25,249,200	26,195,200	27,141,100
1098-T	23,601,819	24,103,100	24,563,700	25,024,300	25,484,900	25,945,500	26,406,100	26,866,700	27,327,300	27,787,900
1099-A	383,150	392,000	400,900	409,600	418,200	426,700	435,100	443,300	451,500	459,500
1099-B	399,176,086	417,557,000	435,946,800	454,336,500	472,726,100	491,115,600	509,505,000	527,894,300	546,283,600	564,672,700
1099-C	1,904,740	2,026,300	2,142,800	2,259,400	2,375,900	2,492,500	2,609,000	2,725,500	2,842,100	2,958,600
1099-CAP	1,595	1,600	1,600	1,600	1,600	1,700	1,700	1,700	1,700	1,700
1099-DIV	102,825,596	115,761,800	116,717,800	117,680,000	118,648,500	119,623,200	120,604,300	121,591,600	122,585,400	123,585,400
1099-G	74,576,323	78,551,800	80,880,200	83,277,600	85,746,000	88,287,500	90,904,300	93,598,600	96,372,700	99,229,000
1099-H	22,938	38,700	54,700	68,500	82,500	97,400	109,700	120,600	128,100	132,300
1099-INT	215,172,286	208,080,600	200,990,200	193,896,700	186,800,200	179,700,900	172,599,000	165,494,700	158,388,100	151,279,400
1099-LTC	189,184	216,800	229,900	252,300	260,600	285,300	300,000	320,300	332,300	353,700
1099-MISC	49,526,389	50,013,200	50,216,800	50,420,300	50,623,900	50,827,500	51,031,100	51,234,700	51,438,300	51,641,900
1099-OID	3,413,330	3,274,800	3,136,300	2,997,700	2,859,100	2,720,600	2,582,000	2,443,500	2,304,900	2,166,300
1099-PATR	1,466,050	1,245,100	1,184,000	1,124,000	1,065,000	1,007,000	949,900	893,700	838,300	783,800
1099-Q	840,355	1,016,600	1,194,000	1,371,500	1,548,900	1,726,300	1,903,700	2,081,200	2,258,600	2,436,000
1099-R	72,167,076	76,107,500	78,853,600	81,557,300	84,253,300	87,186,600	90,653,100	94,139,800	97,591,500	101,107,200
1099-S	4,264,747	3,516,100	3,070,800	2,860,400	3,060,900	3,183,800	3,347,700	3,392,900	3,427,600	3,471,100
1099-SA	500,319	519,200	575,200	631,100	687,100	743,100	799,100	855,100	911,100	967,100
5498	103,596,177	107,370,000	111,139,800	114,909,600	118,679,300	122,449,100	126,218,800	129,988,500	133,758,100	137,527,800
5498-ESA	923,045	956,700	990,200	1,023,800	1,057,400	1,091,000	1,124,500	1,158,100	1,191,700	1,225,300
5498-SA	727,275	797,300	881,900	963,400	1,044,600	1,145,400	1,289,800	1,436,100	1,579,700	1,728,800
Currency Transaction Reports (2)	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total CTR, Non-Paper	11,757,411	12,391,300	12,947,900	13,464,000	13,926,300	14,348,300	14,728,100	15,071,600	15,380,400	15,658,000
FinCen 104 (formerly 4789)	11,706,391	12,319,600	12,875,300	13,379,400	13,835,900	14,248,600	14,621,000	14,956,100	15,257,100	15,526,500
8300	0	0	0	0	0	0	0	0	0	0
FinCen 103 (formerly 8362/8852)	51,020	71,700	72,600	84,600	90,400	99,700	107,100	115,500	123,300	131,500

Notes:

(1) Total Non-Paper includes magnetic tape filing, electronic filing, and diskette filing.

(2) Currency Transaction Report volumes are listed separately and not included in Total Non-Paper.

5498-MSA and 1099-MSA are now obsolete and replaced by Forms 5498-SA and 1099-SA

"N.A" signifies that data is not available since relevant program areas have not yet commenced.

Detail may not add to total due to rounding.

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**Table 5A. Projections of Information and Withholding Documents
Filed on Paper at the Austin IRS Campus: Calendar Years 2007 to 2015**

Form	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total, Paper	16,823,016	23,733,800	23,828,100	23,936,200	24,057,000	24,188,500	24,330,700	24,482,600	24,644,000	24,814,400
W-2	0	0	0	0	0	0	0	0	0	0
W-2G	22,402	44,200	45,400	46,600	47,700	48,900	50,100	51,200	52,400	53,600
K-1 (Form 1041)	0	0	0	0	0	0	0	0	0	0
K-1 (Form 1065)	0	0	0	0	0	0	0	0	0	0
K-1 (Form 1120-S)	0	0	0	0	0	0	0	0	0	0
Foreign	0	0	0	0	0	0	0	0	0	0
SSA/RRB-1099	0	0	0	0	0	0	0	0	0	0
1096	1,947,283	2,849,100	2,869,600	2,890,200	2,911,000	2,931,900	2,953,000	2,974,300	2,995,600	3,017,200
1042-S	0	0	0	0	0	0	0	0	0	0
1098	335,602	506,400	492,000	482,400	476,100	472,000	469,300	467,500	466,300	465,500
1098-C	12,770	16,000	16,100	16,200	16,200	16,300	16,300	16,300	16,400	16,400
1098-E	6,829	6,400	6,000	5,600	5,200	4,800	4,500	4,200	3,900	3,600
1098-T	85,501	131,500	135,700	144,600	158,500	177,400	201,400	230,500	265,000	304,800
1099-A	2,311	2,300	2,300	2,200	2,200	2,200	2,100	2,100	2,100	2,000
1099-B	31,729	37,300	36,100	35,100	34,100	33,100	32,200	31,300	30,500	29,800
1099-C	14,019	21,500	21,200	20,800	20,500	20,100	19,800	19,400	19,100	18,700
1099-CAP	676	700	700	700	700	700	700	700	700	700
1099-DIV	159,827	236,000	227,300	219,400	212,200	205,800	200,300	195,500	191,600	188,600
1099-G	8,825	48,600	48,900	49,300	49,600	50,000	50,400	50,800	51,300	51,800
1099-H	0	0	0	0	0	0	0	0	0	0
1099-INT	323,497	497,800	473,400	450,400	428,900	408,800	389,900	372,100	355,500	339,900
1099-LTC	9,553	9,600	10,500	10,900	11,600	11,900	12,500	13,000	13,600	14,000
1099-MISC	13,207,466	18,302,300	18,454,000	18,605,600	18,757,300	18,909,000	19,060,700	19,212,400	19,364,100	19,515,800
1099-OID	3,112	3,500	3,300	3,000	2,800	2,600	2,400	2,200	1,900	1,700
1099-PATR	19,122	21,400	21,600	21,700	21,800	21,900	22,100	22,200	22,300	22,500
1099-Q	156	700	800	900	1,000	1,100	1,200	1,300	1,400	1,600
1099-R	217,546	381,700	361,700	343,600	327,300	312,600	299,400	287,700	277,200	268,000
1099-S	403,625	604,500	589,900	575,300	560,700	546,100	531,500	516,900	502,300	487,700
1099-SA	646	600	700	700	800	800	900	900	1,000	1,000
5498	9,192	10,300	10,000	9,700	9,400	9,200	8,900	8,700	8,500	8,200
5498-ESA	158	200	200	200	200	200	200	200	200	200
5498-SA	1,167	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100

Notes:
Projected detail may not add to total due to rounding.

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**Table 5B. Projections of Information and Withholding Documents
Filed on Paper at the Cincinnati IRS Campus: Calendar Years 2007 to 2015**

Form	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total, Paper	14,859,912	7,302,700	6,789,500	6,421,800	6,198,000	6,042,200	5,912,200	5,795,300	5,685,800	5,580,900
W-2	0	0	0	0	0	0	0	0	0	0
W-2G	25,395	0	0	0	0	0	0	0	0	0
K-1 (Form 1041)	1,177,056	1,137,800	1,102,500	1,067,100	1,031,800	996,500	961,200	925,800	890,500	855,200
K-1 (Form 1065)	4,078,440	3,941,400	3,819,500	3,697,600	3,575,700	3,453,800	3,331,900	3,210,000	3,088,200	2,966,300
K-1 (Form 1120-S)	2,521,581	2,223,500	1,867,500	1,657,000	1,590,500	1,591,900	1,619,100	1,659,400	1,707,200	1,759,400
Foreign	0	0	0	0	0	0	0	0	0	0
SSA/RRB-1099	0	0	0	0	0	0	0	0	0	0
1096	881,491	0	0	0	0	0	0	0	0	0
1042-S	0	0	0	0	0	0	0	0	0	0
1098	187,134	0	0	0	0	0	0	0	0	0
1098-C	3,152	0	0	0	0	0	0	0	0	0
1098-E	131	0	0	0	0	0	0	0	0	0
1098-T	68,242	0	0	0	0	0	0	0	0	0
1099-A	6	0	0	0	0	0	0	0	0	0
1099-B	8,460	0	0	0	0	0	0	0	0	0
1099-C	11,236	0	0	0	0	0	0	0	0	0
1099-CAP	0	0	0	0	0	0	0	0	0	0
1099-DIV	89,139	0	0	0	0	0	0	0	0	0
1099-G	39,261	0	0	0	0	0	0	0	0	0
1099-H	2	0	0	0	0	0	0	0	0	0
1099-INT	199,807	0	0	0	0	0	0	0	0	0
1099-LTC	0	0	0	0	0	0	0	0	0	0
1099-MISC	5,167,956	0	0	0	0	0	0	0	0	0
1099-OID	500	0	0	0	0	0	0	0	0	0
1099-PATR	2,140	0	0	0	0	0	0	0	0	0
1099-Q	13	0	0	0	0	0	0	0	0	0
1099-R	181,934	0	0	0	0	0	0	0	0	0
1099-S	215,456	0	0	0	0	0	0	0	0	0
1099-SA	0	0	0	0	0	0	0	0	0	0
5498	1,381	0	0	0	0	0	0	0	0	0
5498-ESA	0	0	0	0	0	0	0	0	0	0
5498-SA	0	0	0	0	0	0	0	0	0	0

Notes:
Projected detail may not add to total due to rounding.
Cincinnati will only process paper K-1 returns from 2007.

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**Table 5C. Projections of Information and Withholding Documents
Filed on Paper at the Kansas City IRS Campus: Calendar Years 2007 to 2015**

Form	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total, Paper	10,549,755	18,525,700	18,602,600	18,689,600	18,786,400	18,891,900	19,006,100	19,128,400	19,258,800	19,397,100
W-2	0	0	0	0	0	0	0	0	0	0
W-2G	16,375	43,800	45,000	46,100	47,300	48,400	49,600	50,800	51,900	53,100
K-1 (Form 1041)	0	0	0	0	0	0	0	0	0	0
K-1 (Form 1065)	0	0	0	0	0	0	0	0	0	0
K-1 (Form 1120-S)	0	0	0	0	0	0	0	0	0	0
Foreign	0	0	0	0	0	0	0	0	0	0
SSA/RRB-1099	0	0	0	0	0	0	0	0	0	0
1096	1,798,705	2,798,700	2,818,800	2,839,100	2,859,500	2,880,000	2,900,700	2,921,600	2,942,600	2,963,800
1042-S	0	0	0	0	0	0	0	0	0	0
1098	129,485	239,900	233,100	228,600	225,600	223,600	222,300	221,500	220,900	220,500
1098-C	0	36,900	37,100	37,200	37,400	37,500	37,600	37,600	37,700	37,800
1098-E	3,078	4,100	3,800	3,600	3,300	3,100	2,900	2,700	2,500	2,300
1098-T	98,931	114,800	118,400	126,300	138,400	154,800	175,800	201,200	231,300	266,100
1099-A	1,233	1,500	1,500	1,400	1,400	1,400	1,400	1,300	1,300	1,300
1099-B	16,424	26,200	25,400	24,700	23,900	23,300	22,600	22,000	21,500	20,900
1099-C	7,935	10,800	10,600	10,500	10,300	10,100	9,900	9,800	9,600	9,400
1099-CAP	28	100	100	100	100	100	100	100	100	100
1099-DIV	137,741	198,800	191,500	184,800	178,800	173,400	168,700	164,700	161,500	158,900
1099-G	5,876	6,400	6,400	6,500	6,500	6,600	6,600	6,700	6,700	6,800
1099-H	0	0	0	0	0	0	0	0	0	0
1099-INT	343,704	533,400	507,200	482,600	459,600	437,900	417,700	398,700	380,900	364,200
1099-LTC	6,153	6,200	6,800	7,000	7,500	7,600	8,000	8,400	8,800	9,000
1099-MISC	7,512,386	13,875,500	13,990,500	14,105,500	14,220,500	14,335,500	14,450,500	14,565,500	14,680,500	14,795,500
1099-OID	2,759	3,900	3,600	3,400	3,100	2,900	2,600	2,400	2,100	1,900
1099-PATR	19,423	29,800	30,000	30,100	30,300	30,500	30,700	30,800	31,000	31,200
1099-Q	207	1,400	1,600	1,900	2,100	2,400	2,600	2,800	3,100	3,300
1099-R	184,026	292,700	277,400	263,500	251,000	239,700	229,600	220,600	212,600	205,500
1099-S	251,033	278,600	271,800	265,100	258,400	251,600	244,900	238,200	231,500	224,700
1099-SA	1,028	2,700	2,900	3,100	3,200	3,400	3,600	3,800	4,000	4,200
5498	11,580	14,000	13,600	13,300	12,900	12,500	12,200	11,900	11,600	11,300
5498-ESA	80	100	100	100	200	200	200	200	200	200
5498-SA	1,566	5,300	5,300	5,200	5,100	5,100	5,000	5,000	4,900	4,900

Notes:
Projected detail may not add to total due to rounding.

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**Table 5D. Projections of Information and Withholding Documents
Filed on Paper at the Ogden IRS Campus: Calendar Years 2007 to 2015**

Form	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total, Paper	19,061,694	10,510,900	9,839,100	9,349,800	9,040,800	8,817,100	8,625,600	8,450,600	8,285,000	8,124,900
W-2	0	0	0	0	0	0	0	0	0	0
W-2G	30,987	0	0	0	0	0	0	0	0	0
K-1 (Form 1041)	1,317,251	1,274,300	1,234,700	1,195,200	1,155,600	1,116,000	1,076,500	1,036,900	997,300	957,800
K-1 (Form 1065)	6,480,641	6,300,000	6,105,200	5,910,300	5,715,500	5,520,700	5,325,800	5,131,000	4,936,200	4,741,400
K-1 (Form 1120-S)	3,159,797	2,786,700	2,340,500	2,076,700	1,993,300	1,995,100	2,029,200	2,079,700	2,139,600	2,205,100
Foreign	0	0	0	0	0	0	0	0	0	0
SSA/RRB-1099	0	0	0	0	0	0	0	0	0	0
1096	979,996	0	0	0	0	0	0	0	0	0
1042-S	0	149,900	158,700	167,600	176,400	185,300	194,200	203,000	211,900	220,700
1098	118,165	0	0	0	0	0	0	0	0	0
1098-C	36,689	0	0	0	0	0	0	0	0	0
1098-E	1,392	0	0	0	0	0	0	0	0	0
1098-T	35,277	0	0	0	0	0	0	0	0	0
1099-A	253	0	0	0	0	0	0	0	0	0
1099-B	11,830	0	0	0	0	0	0	0	0	0
1099-C	4,763	0	0	0	0	0	0	0	0	0
1099-CAP	86	0	0	0	0	0	0	0	0	0
1099-DIV	72,012	0	0	0	0	0	0	0	0	0
1099-G	426	0	0	0	0	0	0	0	0	0
1099-H	8	0	0	0	0	0	0	0	0	0
1099-INT	216,957	0	0	0	0	0	0	0	0	0
1099-LTC	0	0	0	0	0	0	0	0	0	0
1099-MISC	6,418,606	0	0	0	0	0	0	0	0	0
1099-OID	1,236	0	0	0	0	0	0	0	0	0
1099-PATR	10,126	0	0	0	0	0	0	0	0	0
1099-Q	151	0	0	0	0	0	0	0	0	0
1099-R	122,338	0	0	0	0	0	0	0	0	0
1099-S	34,256	0	0	0	0	0	0	0	0	0
1099-SA	1,668	0	0	0	0	0	0	0	0	0
5498	2,874	0	0	0	0	0	0	0	0	0
5498-ESA	53	0	0	0	0	0	0	0	0	0
5498-SA	3,855	0	0	0	0	0	0	0	0	0

Notes:

Projected detail may not add to total due to rounding.

Ogden will pick up K-1 and 1042-S volumes from Philadelphia Campus in 2007 as Philadelphia closes.

Ogden will no longer process any oother paper returns from 2007.

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**Table 5E. Projections of Information and Withholding Documents
Filed on Paper at the Philadelphia IRS Campus: Calendar Years 2007 to 2015**

Form	Historical	Projected								
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total, Paper	180,884	0	0	0	0	0	0	0	0	0
W-2	0	0	0	0	0	0	0	0	0	0
W-2G	0	0	0	0	0	0	0	0	0	0
K-1 (Form 1041)	1,010	0	0	0	0	0	0	0	0	0
K-1 (Form 1065)	38,448	0	0	0	0	0	0	0	0	0
K-1 (Form 1120-S)	436	0	0	0	0	0	0	0	0	0
Foreign	0	0	0	0	0	0	0	0	0	0
SSA/RRB-1099	0	0	0	0	0	0	0	0	0	0
1096	0	0	0	0	0	0	0	0	0	0
1042-S	140,990	0	0	0	0	0	0	0	0	0
1098	0	0	0	0	0	0	0	0	0	0
1098-C	0	0	0	0	0	0	0	0	0	0
1098-E	0	0	0	0	0	0	0	0	0	0
1098-T	0	0	0	0	0	0	0	0	0	0
1099-A	0	0	0	0	0	0	0	0	0	0
1099-B	0	0	0	0	0	0	0	0	0	0
1099-C	0	0	0	0	0	0	0	0	0	0
1099-CAP	0	0	0	0	0	0	0	0	0	0
1099-DIV	0	0	0	0	0	0	0	0	0	0
1099-G	0	0	0	0	0	0	0	0	0	0
1099-H	0	0	0	0	0	0	0	0	0	0
1099-INT	0	0	0	0	0	0	0	0	0	0
1099-LTC	0	0	0	0	0	0	0	0	0	0
1099-MISC	0	0	0	0	0	0	0	0	0	0
1099-OID	0	0	0	0	0	0	0	0	0	0
1099-PATR	0	0	0	0	0	0	0	0	0	0
1099-Q	0	0	0	0	0	0	0	0	0	0
1099-R	0	0	0	0	0	0	0	0	0	0
1099-S	0	0	0	0	0	0	0	0	0	0
1099-SA	0	0	0	0	0	0	0	0	0	0
5498	0	0	0	0	0	0	0	0	0	0
5498-ESA	0	0	0	0	0	0	0	0	0	0
5498-SA	0	0	0	0	0	0	0	0	0	0

Notes:

Projected detail may not add to total due to rounding.

Philadelphia's K-1 and 1042-S volumes will be handled by Ogden Campus starting in 2007 as Philadelphia closes.

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Table 6. Configuration of IRS Campuses for Paper Schedules K-1					
Calendar Year 2007 and Beyond					
Cincinnati		Ogden			
Connecticut	Ohio	Alabama	Minnesota	Utah	
Delaware	Pennsylvania	Alaska	Mississippi	Washington	
District of Columbia	Rhode Island	Arizona	Missouri	Wyoming	
Illinois	South Carolina	Arkansas	Montana		
Indiana	Vermont	California	Nebraska	International	
Kentucky	Virginia	Colorado	Nevada		
Maine	West Virginia	Florida	New Mexico		
Maryland	Wisconsin	Georgia	North Dakota		
Massachusetts		Hawaii	Oklahoma		
Michigan		Idaho	Oregon		
New Hampshire		Iowa	South Dakota		
New Jersey		Kansas	Tennessee		
New York		Louisiana	Texas		
North Carolina					
Note: Philadelphia will cease to process returns in 2007, all international forms will be directed to Ogden Campus					

Table 7. Configuration of IRS Campuses for Most Paper Information & Withholding Documents (Exclusive of Schedules K-1 and Form 1042-S)			
Calendar Year 2007 and Beyond			
Austin		Kansas City	
Alabama	New Hampshire	Alaska	Nebraska
Arizona	New Jersey	California	Nevada
Arkansas	New Mexico	Colorado	North Dakota
Connecticut	New York	District of Columbia	Oklahoma
Delaware	North Carolina	Hawaii	Oregon
Florida	Ohio	Idaho	South Carolina
Georgia	Pennsylvania	Illinois	South Dakota
Kentucky	Rhode Island	Indiana	Tennessee
Louisiana	Texas	Iowa	Utah
Maine	Vermont	Kansas	Washington
Massachusetts	Virginia	Maryland	Wisconsin
Mississippi	West Virginia	Michigan	Wyoming
		Minnesota	
		Missouri	
		Montana	

List and Definitions of Information and Withholding Documents Projected in Document 6961

Form W-2, Wage and Tax Statement is filed by employers for each employee on the payroll, to report wages, tips, other compensation, withheld income taxes, social security and Medicare taxes, and advance earned income credit payments.

Form W-2G, Certain Gambling Winnings is provided to recipients of gambling winnings of \$600 or more from horse racing, dog racing, jai alai, lotteries, raffles, and drawings; gambling winnings of \$1,200 or more from bingo or slot machines; and gambling winnings of \$1,500 or more from keno.

Schedule K1-Form 1041, Beneficiary's Share of Income, Credits, Deductions, etc. is filed with Form 1041 to report the beneficiary's share of income from an estate or trust.

Schedule K1-Form 1065, Partner's Share of Income, Credits, Deductions, etc. is used by filers of Form 1065 to report each partner's share of the partnership's income, credits, deductions, etc.

Schedule K1-Form 1120S, Shareholder's Share of Income, Credits, Deductions, etc. is used by filers of Form 1120S to report each shareholder's pro rata share of corporate income (less taxes the corporation paid on income), credits, deductions, etc.

Foreign Information Returns are filed by foreign corporations that pay interest or dividend income to U.S. citizens. There is no standard format for transmitting such information to the Internal Revenue Service.

Form 1042-S, Foreign Person's U.S. Source Income Subject to Withholding, is filed for amounts paid to foreign persons that are subject to withholding, even if no amount is withheld or deducted because of a treaty or Code exception to taxation or if any amount withheld was repaid to the payee. Amounts subject to withholding are from sources within the U.S. that constitute either fixed or determinable annual or periodical (FDAP) income; certain gains from the disposal of timber, coal, or domestic iron ore with a retained economic interest; or gains relating to contingent payments received from the sale or exchange of patents, copyrights, and similar intangible property.

Form 1096, Annual Summary and Transmittal of U.S. Information Returns, is a "payer" transmittal document used to transmit paper "payee" documents.

Form 1098, Mortgage Interest Statement is filed to report mortgage interest (including reportable points) of \$600 or more received in a trade or business from an individual, including a sole proprietor.

Form 1098-C, Contributions of Motor Vehicles, Boats and Airplanes, filed by charitable organizations which receive donations of such items made by taxpayers. This form type will be first available in CY 2006.

Form 1098-E, Student Loan Interest Statement, is to be filed by financial institutions, governmental units, educational institutions, or any other persons who receive (from an individual) student loan interest of \$600 or more during the year.

Form 1098-T, Tuition Statement, is to be filed by educational institutions that received (from an individual) qualified tuition and related expenses in a given year.

Form 1099-A, Acquisition or Abandonment of Secured Property, is filed for each borrower if money is loaned in connection with a trade or business and, in full or partial satisfaction of the debt, an interest in property is acquired that is security for the debt, or the property has been abandoned.

Form 1099-B, Proceeds from Broker and Barter Exchange Transactions, is provided to each person for whom a broker has sold stocks, bonds, commodities, regulated futures contracts, foreign currency contracts, forward contracts, debt instruments, etc., or who has exchanged property or services through a barter exchange.

Form 1099-C, Cancellation of Debt, is filed by financial institutions and federal government agencies to report certain debts that are forgiven in excess of \$600. This form **is not** required in situations involving consumer bankruptcies.

Form 1099-CAP, Changes in Corporate Control and Capital Structure, for shareholders of a corporation if control of the corporation was acquired or it underwent a substantial change in capital structure. Form 1099-CAP is furnished to shareholders who receive cash, stock, or other property from an acquisition of control or a substantial change in capital structure.

Form 1099-DIV, Dividends and Distributions, is provided to each person who: received \$10 or more in gross dividends and other stock distributions; had withheld and paid foreign tax on dividends; had withheld income under the backup withholding rules or received \$600 or more as part of a liquidation.

Form 1099-G, Certain Government Payments is filed by persons who made certain payments as a unit of federal, state, or local government, including payments of \$10 or more in unemployment compensation (also Railroad Retirement Board payments for unemployment); refunds, credits, or offsets of state or local income tax of \$10 or more; federal income tax withheld (backup withholding); and certain taxable grants.

Form 1099-H, Health Coverage Tax Credit (HCTC) Advance Payments, is filed if HCTC advance payments of health coverage insurance premiums were forwarded directly to health insurance providers on behalf of recipients meeting certain eligibility requirements.

Form 1099-INT, Interest Income, is provided to each person who: received \$10 or more in interest income; had withheld and paid foreign tax on interest; or had withheld income under the backup withholding rules.

Form 1099-LTC, Long-Term Care and Accelerated Death Benefits, is filed if payments are made for any long-term care benefits, including accelerated death benefits. Payers include insurance companies, governmental units, and viatical settlement providers.

Form 1099-MISC, Miscellaneous Income, is provided to each person who: received at least \$10 in royalties or broker payments in lieu of dividends or in lieu of tax-exempt interest; received at least \$600 in rents, services, prizes and awards, other income payments, and medical and health care payments; or received any fishing boat proceeds. In addition, Form 1099-MISC is also used to report the direct sales of at least \$5,000 of consumer products to a buyer for resale. Persons with backup withholdings should also receive a copy of the form regardless of the amount of withholding.

Form 1099-OID, Original Issue Discount, is provided by an issuer of: outstanding bonds or other evidence of indebtedness in registered or bearer form issued with original issue discount of more than \$10; certificates of deposits of over one year; other deposit arrangements such as time deposits or bonus savings plans having a term in excess of one year, provided the payment of interest is deferred until maturity; or collateralized debt obligation by a real estate mortgage investment conduit (REMIC) or other issuer. It is also filed if there are backup withholdings, even though the amount of the original issue discount is less than \$10.

Form 1099-PATR, Taxable Distributions Received from Cooperatives, must be filed by cooperatives for each person to whom the cooperative has paid at least \$10 in patronage dividends and other distributions or for backup withholdings regardless of the amount of payment.

Form 1099-Q, Payments from Qualified Education Programs (Under Sections 529 and 530), is a result of legislation which expanded the definition of a qualified tuition program to include programs established and maintained by private eligible educational institutions. Reporting of earnings from qualified state tuition programs (as described in the Internal Revenue Code, Section 529) was moved from Box 5 of the Form 1099-G, to Form 1099-Q.

Form 1099-R, Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc., is provided to each person who has received distributions from profit-sharing or retirement plans, IRAs, annuities, pensions, etc., whether or not any amount of Federal income tax was withheld.

Form 1099-S, Proceeds from Real Estate Transactions, is filed to report the sale or exchange of reportable real estate.

Form 1099-SA, Distributions from an HSA, Archer MSA or Medicare Advantage MSA, to report distributions made from an HSA, Archer MSA, or Medicare Advantage MSA (MA MSA). The distribution may have been paid directly to a medical service provider or to the account holder. A separate return must be filed for each plan type.

Form 1099-SSA (Social Security Benefit Statement) / Form 1099-RRB (Payments by the Railroad Retirement Board), are filed by the Social Security Administration and the Railroad Retirement Board to show the amount of retirement payments made to individual recipients. This type of reporting is made via magnetic media.

Form 5498, IRA Contribution Information, is filed for each person who had an individual retirement arrangement to report contributions and the fair market value of the account.

Form 5498-ESA, Coverdell ESA Contribution Information, reports contributions (including rollovers) to a Coverdell ESA (Education Savings Account).

Form 5498-SA, HSA, Archer MSA or Medicare Advantage MSA (MA MSA) Information, is submitted by the trustee or custodian of an Health Savings Account (HSA), Archer Medical Savings Account (MSA) or Medicare Advantage MSA. Rollovers from one Archer MSA to another Archer MSA, and receipt of a rollover from an Archer MSA or an HSA to an HSA must be reported.

FinCen 103, formerly Form 8362/8852, CTR by Casinos/CTR by Casinos-Nevada, is filed by casinos to report either currency received or currency disbursed in excess of \$10,000. The Form 8852 filing numbers are embedded in the Form 8362 numbers in Document 6961.

FinCen 104, formerly Form 4789, Currency Transaction Report (CTR), is filed by financial institutions to report cash amounts received in excess of \$10,000.

Form 8300, Report of Cash Payments Over \$10,000 Received in a Trade or Business, is a currency transaction report filed by an entity engaged in a trade or business that receives a cash payment in excess of \$10,000.

Statement of Methodology

Three major sets of projections are included in this document. The first group in Table 2 contains all media grand total projections for withholding and other Information Reporting Program (IRP) documents received by the IRS. Table 3 contains the second set of projections, which includes the paper portion. The third group, found in Table 4, includes the non-paper portion (magnetic tape, electronic, and diskette filing) of the projections. All of these projections are at the U.S. level. In compliance with customer requests, Tables 5 A-E present projections of all paper documents, except Currency Transaction Reports (CTRs), for IRS processing campuses. CTRs are all processed by the Detroit Computing Center.

Data Sources and 2006 Historical Paper Volumes

Actual (historical) data on the volume of IRP documents filed are provided by program staff under the operating divisions and Information Technology Services. Data sources include: MCC IRP Reformat Report, IRMF File Report, CAWR W-2 Control Report, IRP Counts for 1099-SSA/RRB, Paper IRP Production Report, other campus sources, and the national calendar year Currency Transaction Report receipts. Counts for non-paper Form 1042-S were provided by relevant program staff. Paper counts of Foreign Information Return Program (FIRP) are no longer available as funding for the processing of FIRP is no longer provided. Non-paper counts of Foreign Information Returns were provided by program staff at MCC.

U.S. Level Forecasts

The U.S. level grand total (all media) paper projections were forecasted through a combination of time series extrapolations and regression analysis. Each form type was forecasted separately. In some instances, regression models were developed using appropriate economic/demographic variables. In other instances, forecasts for grand total volumes were built from historical time trends. Time trend models were used to forecast the paper IRP document volumes, again by form type. Projections of most IRP non-paper documents were then derived by subtracting projections of the IRP paper documents from the grand total projections.

For Forms 1041 K-1, 1120-S K-1, 1098-T, 1099-CAP, 1099-H, 1099-Q, and 1099-SA the non-paper portions were first modeled, and paper subtracted from the grand total. Moreover, for Forms 1096, Form 8300, and FinCen 103 (formerly form 8362/8852), paper is the only accepted transmittal format. Therefore, for these form types, the grand total and paper volumes were the same.

Campus Level Forecasts and Impact of Modernization Alignment

The Service Center Recognition/Imaging Processing System (SCRIPS) enables IRS campuses to optically scan most paper IRP documents. As a result, the IRS will consolidate the filing/processing of these forms into two designated “SCRIPS” sites in CY 2007. Most paper documents will be processed at the Austin and Kansas City campuses. The paper Schedule K-1 series documents will be handled exclusively by the Cincinnati and Ogden campuses. Paper forms submitted from the International area will be processed in Ogden.

The campus level forecasts were derived based on their relative shares of the U.S. totals in CY 2006 by applicable form type. These shares were held constant throughout the forecast horizon through 2015. In addition, all paper Currency Transaction Reports (CTRs) continue to be handled at the Detroit Computing Campus. Thus, campus level forecasts are not applicable for CTRs.

Table 6 reflects the current processing campus alignment of states/international for paper Schedules K-1. Table 7 shows the current alignment of states/international by processing campus for all other paper documents. Paper Forms 1099 and 1098 will be processed at the Austin and Kansas City service centers instead of the Ogden and Cincinnati campuses from January 2007. The campus level tables will change to reflect any future re-alignments.