

008 Returns Posting Statistical Info Report (Report 008)

The Returns Posting Statistical Info Report provides Individual Income Tax return processing year-to-date filing statistics for each locality and for the entire state. The local offices receive the totals generated for their locality.

The Returns Posting Statistical Info Report is divided into multiple sections:

- 008.E Returns Posting Statistical Info Report (portion 1 and portion 2) for State
- 008.F Returns Posting Statistical Info Report (portion 1 and portion 2) for localities
- 008.G Returns Posting ElectronicPaper Report for State
- 008.H Returns Posting ElectronicPaper Report for Localities

Purpose and Users

The report is used by TAX Representatives in Policy Development and Revenue Forecasting, and the local Commissioners of Revenue, Supervisors of Assessments and Directors of Finance to track return submissions.

Frequency

This report is run monthly.

Returns Posting Statistical Info Report (Report 008.E)

Section E of the report provides statistical information on all Individual Income tax returns processed in the State. The count associated for each form type by filing status is presented for viewing as well as totals for each form type. In addition, the percentages of direct filed returns and local filed returns is provided as well.

The Returns Posting Statistical Info Report Section E has two portions:

- State-wide Statistical Information by Different Filing Statuses and Return Types for a specific Processing Year.
- State-wide Statistical Information for Returns claiming a standard deduction, itemized deduction, age deduction, and 760C.

Returns Posting Statistical Info Report (Report 008.E) (Portion 1)

Virginia Department of Taxation										
Report ID: 008.E	Individual Income Tax Return Processing Statistics									Date Created: 11/22/2016 Thru: 10/2016
Statistical Information by Different Filing Statuses and Return Types										
Processing Year 2016 for State										
Filing Status	760	760PY	763	763S	770	Amended	Total	Standard	Deductions	
									Itemized	
Single	2,129,768	60,325	78,416	3,927	0	25,985	2,298,421	1,643,113	578,505	
Married filing joint	1,412,957	20,995	53,073	0	0	31,071	1,518,096	603,087	872,188	
Married filing separate	103,366	5,927	27,032	0	0	2,171	138,496	63,594	62,589	
Married, filing separately on this combined return	2	10,781	0	0	0	392	11,175	4,542	5,111	
Married, spouse has no income	0	0	14,053	0	0	159	14,212	4,304	9,652	
Fiduciary	5	28	67	0	49,688	3	49,791	41	27	
Total	3,646,098	98,056	172,641	3,927	49,688	59,781	4,030,191	2,318,681	1,528,072	
Percentage (%)	90.47 %	2.43 %	4.28 %	0.10 %	1.23 %	1.48 %	100.00 %	58.40 %	38.49 %	
Direct Filed	3,479,633	94,563	167,447	3,926	40,389	59,485	3,845,443	2,210,977	1,464,869	
Local Field	166,465	3,493	5,193	1	9,299	296	184,747	107,704	63,202	
Filed	Single	Married filing joint	Married filing separate	Married, spouse has no income	Married, filing separately on this combined return	Fiduciary	Total	Percent (%)		
Direct	2,181,371	1,411,635	128,327	13,773	10,367	40,485	3,785,958	95.35 %		
Local	91,065	75,390	7,998	280	416	9,302	184,451	4.65 %		
Additional Information: CONFIDENTIAL TAXPAYER DATA UNDER SECTION 58.1-3 OF THE CODE OF VIRGINIA. PENALTIES FOR UNAUTHORIZED DISCLOSURE.										
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The table below identifies columns for Portion One on the Returns Posting Statistical Info Report (008.E).

Columns	Description
Filing Status	Different filing statuses (i.e. single, married filing joint, etc.) with counts by form type and for amended returns with a total of the various returns. In addition, the data is also provided for the number of returns with standard versus itemized deduction for each filing status.
Percentage (%)	The percentage of returns filed via a form type that are Direct Filed and Local Filed.
Filed	The number of returns filed by the filing statuses (i.e. single, married filing joint, etc.) for Direct and Local Filed returns. grand total is provided for Direct and Local filed returns with associated percentages provided.

Returns Posting Statistical Info Report (Report 008.E) (Portion 2)

Virginia Department of Taxation			
Individual Income Tax Return Processing Statistics			
Processing Year 2016 for State			
Report ID: 008.E			
Returns Claiming	Count	Percent (%)	Amount (\$)
Standard Deduction	1,018	20.82 %	4,275,308.00
Itemized Deduction	571	11.68 %	17,395,032.00
Age Deduction	127	2.80 %	1,830,594.00
780 C	122	10.70 %	16,482.00
	Count	Percent(%)	Amount(\$)
Total Current Year Refunds	882	64.71 %	-957,799.00
Total Current Year Tax Dues	313	23.50 %	853,843.00
Total Current Year Zero Returns	157	11.79 %	0.00
Total Current Year Returns	1,332	100.00 %	-103,956.00
Total Prior Year Refunds	212	35.16 %	-420,579
Total Prior Year Tax Dues	266	44.11 %	1,472,138
Total Prior Year Zero Returns	125	20.73 %	0.00
Total Prior Year Returns	603	100.00 %	1,051,559

The table below identifies columns for Portion Two on the Returns Posting Statistical Info Report (008.E).

Columns	Description
Returns Claiming	The count, percentage, and amount associated with returns claiming Standard Deduction, Itemized Deduction, Age Deduction, and 760 state-wide.
Count	The number of returns claiming Standard Deduction, Itemized Deduction, Age Deduction, and 760 state-wide.
Percent (%)	The percentage of returns claiming Standard Deduction, Itemized Deduction, Age Deduction, and 760 state-wide.
Amount (\$)	The percentage of returns claiming Standard Deduction, Itemized Deduction, Age Deduction, and 760 state-wide.
Total Current Year Refunds	The count, percentage, and amount associated with Current Year Refund returns state-wide.
Total Current Year Tax Dues	The count, percentage, and amount associated with Current Year Tax Due returns state-wide .
Total Current Year Zero Returns	The count, percentage, and amount associated with Current Year Zero returns state-wide .
Total Current Year Returns	The total count, associated percentage, and total amount associated with Current Year returns state-wide .
Total Prior Year Refunds	The count, percentage, and amount associated with Prior Year Refund returns state-wide .
Total Prior Year Tax Dues	The count, percentage, and amount associated with Prior Year Tax Due returns state-wide.
Total Prior Year Zero Returns	The count, percentage, and amount associated with Prior Year Zero returns state-wide .
Total Prior Year Returns	The total count, associated percentage, and total amount associated with Prior Year returns state-wide .



Returns Posting Statistical Info Report (Report 008.F) (Portion 1)

Section F of the report provides statistical information on all Individual Income tax returns processed by the locality.. The count associated for each form type by filing status is presented for viewing as well as totals for each form type. In addition, the percentages of direct filed returns and local filed returns is provided as well.

The Returns Posting Statistical Info Report Section F has two portions:

- Locality-specific Statistical Information by Different Filing Statuses and Return Types for a specific Processing Year.
- Locality-specific Statistical Information for Returns claiming a standard deduction, itemized deduction, age deduction, and 760C.

Virginia Department of Taxation								Date Created: 11/21/2016
Individual Income Tax Return Processing Statistics								Thru 10/2016
Report ID: 008.F								
Statistical Information by Different Filing Statuses and Return Types								
Processing Year 2016 for Abingdon								
Filing Status	760	763	770	Amended	Total	Standard	Deductions Itemized	
Single	0	1	0	0	1	0	0	
Married filing joint	1	1	0	0	2	0	0	
Fiduciary	0	0	516	0	516	0	0	
Total	1	2	516	0	519	0	0	
Percentage (%)	0.19 %	0.39 %	99.42 %	0.00 %	100.00 %	0.00 %	0.00%	
Direct Filed	1	2	513	0	516	0	0	
Local Filed	0	0	3	0	3	0	0	
Filed	Single	Married filing joint	Fiduciary	Total	Percent (%)			
Direct	1	2	513	516	99.42 %			
Local	0	0	3	3	0.58 %			
Additional Information: CONFIDENTIAL TAXPAYER DATA UNDER SECTION 58.1-3 OF THE CODE OF VIRGINIA. PENALTIES FOR UNAUTHORIZED DISCLOSURE.								
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The table below identifies columns for Portion One on the Returns Posting Statistical Info Report (008.F).

Columns	Description
Filing Status	Different filing statuses (i.e. single, married filing joint, etc.) as well as amended returns with counts by form type, grand totals, and standard versus itemized deductions processed for the locality.
Percentage (%)	The percentage of returns filed via a form type that are Direct Filed and Local Filed processed for taxpayers in the locality.
Filed	The various filing statuses (i.e. single, married filing joint, etc.) associated with return filings for taxpayers in the locality The number of returns filed by taxpayers in the locality via a filing status that are Direct Filed and Local Filed. A grand total is provided for Direct and Local filed returns with associated percentages provided.

Returns Posting Statistical Info Report (Report 008.F) (Portion 2)

Virginia Department of Taxation								Date Created: 11/30/2016	
Individual Income Tax Return Processing Statistics								Thru 10/2016	
Report ID: 008.F									
Processing Year 2016 for Fips Unassigned									
Filing Status	760	760PY	763	763S	770	Amended	Total	Standard	Deductions Itemized
Married filing joint	478	173	143	0	0	22	816	452	295
Single	466	173	60	137	0	18	854	406	199
Married filing separate	113	38	38	0	0	8	197	114	46
Married, filing separately on this combined return	0	77	0	0	0	0	77	39	31
Married, spouse has no income	0	0	7	0	0	0	7	7	0
Fiduciary	0	0	0	0	32	0	32	0	0
Total	1,057	461	248	137	32	48	1,983	1,018	571
Percentage (%)	53.30 %	23.25 %	12.51 %	6.91 %	1.61 %	2.42 %	100.00 %	52.61 %	29.51 %
Direct Filed	1,048	460	247	137	32	48	1,972	1,011	567
Local Field	9	1	1	0	0	0	11	7	4
Filed	Single	Married filing joint	Married filing separate	Married, spouse has no income	Married, filing separately on this combined return	Fiduciary	Total	Percent (%)	
Direct	830	789	189	7	77	32	1,924	99.43 %	
Local	8	5	0	0	0	0	11	0.57 %	

The table below identifies columns for Portion Two on the Returns Posting Statistical Info Report (008.F).

Columns	Description
Returns Claiming	The count, percentage, and amount associated with returns claiming Standard Deduction, Itemized Deduction, Age Deduction, and 760 for the locality.
Count	The number of returns claiming Standard Deduction, Itemized Deduction, Age Deduction, and 760 for the locality.
Percent (%)	The percentage of returns claiming Standard Deduction, Itemized Deduction, Age Deduction, and 760 for the locality.
Amount (\$)	The amount associated with returns claiming Standard Deduction, Itemized Deduction, Age Deduction, and 760 for the locality.
Total Current Year Refunds	The count, percentage, and amount associated with Current Year Refund returns for the locality.
Total Current Year Tax Dues	The count, percentage, and amount associated with Current Year Tax Due returns for the locality.
Total Current Year Zero Returns	The count, percentage, and amount associated with Current Year Zero returns for the locality.
Total Current Year Returns	The total count, associated percentage, and total amount associated with Current Year returns for the locality.
Total Prior Year Refunds	The count, percentage, and amount associated with Prior Year Refund returns for the locality.
Total Prior Year Tax Dues	The count, percentage, and amount associated with Prior Year Tax Due returns for the locality.
Total Prior Year Zero Returns	The count, percentage, and amount associated with Prior Year Zero returns for the locality.
Total Prior Year Returns	The total count, associated percentage, and total amount associated with Prior Year returns for the locality.

Returns Posting Electronic Paper Report (Report 008.G)

Section G of the report provides statistical information on Individual Income tax returns processed tge various filing mediums state-wide. The count associated with each filing medium is provided as well as the associated amount and a calculated percentage (of the total for that medium).

Report ID: 008.G		Virginia Department of Taxation Individual Income Tax Return Processing Statistics		Date Created: 11/21/2016 For: 10/2016 - 10/2016	
Statistical Information on Returns Processed Through Different Channels Processing Year 2016 for State					
Filing Status : Electronic					
Filing Type		Count	Amount (\$)	Percent (%)	
KFI	Refund Direct	862	-1,890,215.00	20.87 %	
	Refund Local	110	-86,433.00	17.43 %	
	Tax Due Direct	1,296	16,699,510.00	31.37 %	
	Tax Due Local	133	382,419.00	21.08 %	
	Zero Direct	1,973	0.00	47.76 %	
	Zero Local	388	0.00	61.49 %	
	Total	4,762	15,105,281.00	100.00 %	
IE	Refund Direct	31	-18,156.00	50.00 %	
	Tax Due Direct	17	20,243.00	27.42 %	
	Zero Direct	14	0.00	22.58 %	
Total	62	2,087.00	100.00 %		
EFILE	Refund Direct	34,286	-49,415,842.00	41.41 %	
	Tax Due Direct	35,687	360,194,104.00	43.13 %	
	Zero Direct	12,795	0.00	15.46 %	
Total	82,748	310,778,262.00	100.00 %		
Total Electronic		87,572	325,885,630.00		
Filing Status : Paper					
Filing Type		Count	Amount (\$)	Percent (%)	
TACS	Refund Direct	5,092	-6,236,777.00	46.19 %	
	Refund Local	879	-742,737.00	59.23 %	
	Tax Due Direct	4,733	45,759,281.00	42.93 %	
	Tax Due Local	352	1,934,311.00	23.72 %	
	Zero Direct	1,200	0.00	10.88 %	
	Zero Local	253	0.00	17.05 %	
	Total	12,509	40,714,078.00	100.00 %	
Total TACS/Life Works		12,509	40,714,078.00		
Grand Total:		100,081	366,599,708.00		
Additional Information: CONFIDENTIAL TAXPAYER DATA UNDER SECTION 58.1-3 OF THE CODE OF VIRGINIA. PENALTIES FOR UNAUTHORIZED DISCLOSURE.		Page 1 of 1	Time Created: 8:42:58 PM		

The table below identifies columns The Returns Posting ElectronicPaper Report (008.G).

Columns	Description
Filing Status	The method of return entry which includes various methods of electronic filing (KFI-key from image, IE (Internal EForms), and Efile) as well as paper filing through TACS (Tax Automated Capture System).
KFI	For KFI entry, valid filing categories include local and direct refunds, local and direct tax dues, and local and direct zero returns.
IE and Efile	For IE and EFile entries, valid filing categories include direct refund, tax due, and zero returns.
Paper	For TACS entry, valid filing categories include local and direct refunds, local and direct tax dues, and local and direct zero returns.
Count	The number of returns for each filing medium.
Amount (\$)	The amount associated with the returns for each filing medium.
Percent (%)	The percent associated with the returns for each filing medium.



The table below identifies columns in Portion Two of the Returns Posting ElectronicPaper Report (008.H).

Columns	Description
Filing Status	The method of return entry which includes various methods of electronic filing (KFI-key from image, IE (Internal EForms), and Efile) as well as paper filing through TACS (Tax Automated Capture System).
KFI	For KFI entry, valid filing categories include local and direct refunds, local and direct tax dues, and local and direct zero returns.
IE and Efile	For IE and EFile entries, valid filing categories include direct refund, direct tax due, and direct zero returns.
Paper	For TACS entries, valid filing categories include local and direct refunds, local and direct tax dues, and local and direct zero returns.
Count	The number of returns for each filing medium.
Amount (\$)	The amount associated with the returns for each filing medium.
Percent (%)	The percent associated with the returns for each filing medium.

