

Instructions For Completing Form 4913

All employees and volunteers who participate in Wage & Investment (W&I) educational activities should complete Form 4913 immediately following the activity. Stakeholder Partnerships, Education and Communication (SPEC) staff may complete the form for volunteers. SPEC Territory Managers and Management Assistants should only complete Form 4913 if they directly participate in a SPEC activity. SPEC Territory Managers will transmit Form 4913 data timely to the Detroit Computing Center (DCC) to report activities timely.

Note: The Balanced Measures & Diagnostics Data Dictionary defines many of the terms used on this form.

Lines 01-03 **General**—Enter employee/volunteer name, territory name, **Office Location Code** and the date of the activity.

Lines 04-06 **Participant Type**—Select the appropriate type and check the box. Participant type 04 SPEC indicates direct activity. Participant type 06 Partner indicates leveraged activity. A SPEC employee participating in a Partner's outreach activity would check Participant type 06 to report the number of taxpayers contacted through this event. A Media outreach event should always be counted as a leveraged outreach event, participant type 06 Partner.

Lines 07-21 **Program Activity:**

Number of Taxpayer Contacts—Record the number of taxpayer contacts for the Outreach, EITC, and E-Services program activities. SPEC no longer counts taxpayer contacts through the VITA, TCE, or BPOL programs. The number of taxpayer contacts is based on a reasonable correlation between the tax law information provided in the outreach event and the targeted audience. The targeted audience is the estimated number of listeners, subscribers, seminar participants, or the television audience, etc., who will benefit from the message being delivered (i.e., EITC information given to low income taxpayers). Targeted audience information should be obtained before the outreach event.

Number of Volunteers—For all programs, record the number of volunteers. For the VITA and TCE programs, a volunteer is someone who has completed training and/or actively involved in the program at an open tax preparation site. Record volunteers only once for the fiscal year, even if they participate in more than one SPEC program.

Number of Sites/Sessions—For VITA (Lines 7–8) and TCE (Line 9), count each site location where assistance is offered to more than one taxpayer as **one site**. For a volunteer who travels to many different locations (such as nursing homes, schools or home visits) to provide a one-day assistance, count as **one site**.

For Bank, Post Office and Library (BPOL—Line 11), count only BPOL locations where volunteers are available to distribute forms, stock forms, or answer questions.

Media events (Lines 12, 15, and 18) include, but are not limited to, newspaper articles, television appearances, and radio show interviews. Media events are leveraged activities, therefore participant type 06 Partner should always be selected.

Mailings (Lines 13, 16, and 19) include paper and electronic means.

The "All Other" category through the Outreach, EITC, and E-Services programs (Lines 14, 17, and 20), includes, but is not limited to, educational seminars, meetings, and presentations, etc. Count each session every time the session is offered, even if it is offered at the same location. For conferences, conventions, and community service events, count each session where SPEC programs are presented.