Stakeholder Partnerships, Education, and Communication Statistical Report

01. Participant's Name	02. Territory/Office Name	03. Office Location Code	Date
		☐-☐☐-☐☐-☐☐-☐☐☐☐☐	

PARTICIPANT TYPE: PLEASE CHECK ONE BOX

SPEC	SBSE	Other IRS Support	Volunteers	Partners
04. ☐	05. ☐	06. ☐	07. ☐	08. ☐

PROGRAM ACTIVITY: ENTER INFORMATION SPECIFIED BY INSTRUCTIONS ON BACK

Program	Hours (Round to Nearest Hour)	Number of Taxpayers Assisted	Number of Volunteers	Number of Sites/ Sessions	Number of Paper Returns	Number of Electronic Returns	Number of EITC Returns
14. VITA							
15. Reserved							
16. Military VITA							
17. TCE							
18. AARP							
19. Bank, Post Office and Library							
20. Student Tax Clinics							
21. Reserved							
22. Partnerships and Information Outreach							
23. Community Outreach							
24. Understanding Taxes 8th Grade							
25. Understanding Taxes High School							
26. Understanding Taxes Post Secondary							
27. E-Services and Education							
28. EITC Outreach							
29. Program Administration							

Remarks:

Instructions For Completing Form 4913

All employees and volunteers who participate in Wage & Investment (W&I) educational activities should complete Form 4913 immediately followings 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 reflect up-to-date monthly activity. IRM 22.30.1.5.2 provides new reporting guidelines.

Note: The SPEC Data Dictionary on Reporting Business Results defines many 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 04-08 **Participant Type—**Select the appropriate type and check the box.

SPEC—includes tax specialist and other SPEC employees providing direct support to SPEC programs.

All Other IRS Support—all other IRS employees.

Lines 14-29 **Program Activity:**

Hours—Record the number of hours for each program activity. If an employee works in support of the TCE program, (Non-AARP or AARP), record the hours on Line 17. Activities could include: preparing to instruct and teach a training class, meetings, site visits, and preparing returns.

Number of Taxpayers Assisted—Record the number of taxpayers assisted for each program activity. For VITA (Lines 14-16), TCE (Line 17), and Bank, Post Office and Library (BPOL–Line 19) enter the total from the consolidated Forms 6522 summary report system. **Note:** Attendees at electronic filing educational seminars are counted as Community Outreach taxpayers assisted and not Line 27.

For Student Tax Clinics (Line 20), enter the number of taxpayers who received assistance (count each taxpayer only once although more than one counseling session may be provided.)

See your Territory Manager for instructions on recording Partnership and Information Outreach (Line 22) and E-Services & Education (Line 27).

Numbers of Volunteers—For all programs, record the number of volunteers. For VITA and TCE, a volunteer is someone who has completed training and/or is actively involved in the program. Record volunteers only once for the fiscal year in each program area in which they participate, e.g., an individual volunteering in both VITA and STC would be counted once in each area. For reporting instructions for volunteers for lines 22 and 27, see your Territory Manager.

Numbers of Sites/Sessions—For VITA (Lines 14–16) and TCE (Line 17), 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 19), count only BPOL locations where volunteers are available to distribute forms, stock forms, or answer questions.

For Student Tax Clinics (Line 20), count the number of locations.

For Community Outreach (Line 23), count each session offered, even if it is offered at the same location. For conferences, conventions, and community services events, count each session where SPEC programs are presented. Partnerships and Information Outreach (Line 22) and E-Services & Education (Line 27) should be reported as directed by your Territory Manager.