



**TAXPAYER SERVICE**

**STAKEHOLDER PARTNERSHIP EDUCATION & COMMUNICATION**

# **SPEC Over-the-Phone Interpreter (OPI) Services Training**



# **SPEC Over-the-Phone Interpreter (OPI)**

## **Objectives:**

1. Background
2. Understand the OPI process
3. Use the OPI line
4. Complete the OPI log accurately
5. Report OPI usage weekly



## **Background**

The IRS is dedicated to serving our multilingual customers by providing over-the-phone interpreter (OPI) services in Limited English Proficiency (LEP) communities. OPI is a program funded by the federal government.

OPI offers real-time interpretation services for various languages through virtual call centers, providing service 24/7, 365 days a year. The SPEC OPI service is free and accessible to all VITA/TCE partners.

All employees and partners are required to complete the annual SPEC OPI training. Upon completion, the OPI PIN is activated for use.



## **SPEC OPI Service**

SPEC OPI services include all aspects of the SPEC business model. This includes income tax return preparation, educational outreach, and financial education and asset building (FEAB) information.

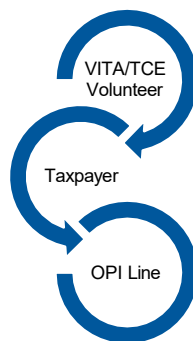
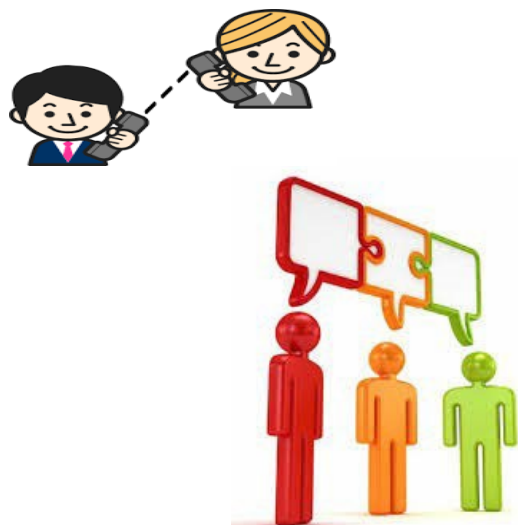
Examples include:

- Quality site reviews
- Field site visits
- Return reviews
- ITIN applications
- FEAB services
- Outreach and education

Partners who want to use the SPEC OPI services for purposes other than return preparation must obtain prior written authorization. The request must be sent to the Relationship Manager and Area OPI/POC/SME for approval.



## SPEC OPI Visual Process



This is a visual of the OPI process. The site will need to have conference call capabilities to use the OPI service. As you can see here, the volunteer will call the taxpayer. Once the taxpayer is connected with the volunteer, the volunteer then calls the OPI line. You will see in a couple of slides how this will work in detail.



## **Lionbridge Interactive Voice Response easy to follow instructions for *on-demand* telephonic interpretation**

**Step #1:** Volunteer calls taxpayer.



**Step #2:** With volunteer and taxpayer on the line, volunteer calls the interpreter on their toll-free line at 888-563-1155.

**Step #3:** Enter your site's assigned personal identification number (PIN).

**Step #4:** Press 1 for Spanish

Press 2 for Creole

Press 3 for Mandarin

Press 4 for Korean

Press 5 for Vietnamese

Press 6 for Somali

Press 7 for Russian

Press 8 for French

Press 9 for Arabic



**For any other language needs or concerns, press 0 for operator assistance.**



# Tips For Working With Taxpayers

**Please note: Contact may be in person or over the phone.**



- ▶ If in person, maintain eye contact with the taxpayer.
- ▶ Observe body language.
- ▶ Speak slowly and have patience with the taxpayer.
- ▶ Remember, your conversation is with the taxpayer and not the interpreter.
- ▶ Keep the taxpayer engaged.



# Tips For Working With the OPI Interpreters

**Please note: The user must have the taxpayer on the phone line prior to initiating the call to OPI line for interpreter assistance.**



- ▶ Please briefly explain the purpose of the call.
- ▶ Please eliminate any background noise.
- ▶ Please speak at a moderate rate of speech and instruct your parties to speak one at a time.
- ▶ The interpreter facilitates communication; he/she will not conduct the call itself.
- ▶ Please contact your SPEC relationship manager with any questions or concerns.





# **Using the OPI Line for Tax Preparation**

1. Scheduling Appointments
2. Intake/Interview Process
3. Questions
4. Resolving Rejected Returns
5. Conducting Quality Review



# Weekly SPEC OPI Log

[illegible]

[illegible]



Enter  
Language

**Time Zone**  
Select time zone where the call was made.



## Write comments

[illegible]

- Taxpayer did not have all information.
- Return out of scope.
- Call dropped, had to call back.
- Time to connect with interpreter was too long.



## **Procedure Change for Missing OPI Logs**

- Submission of the logs is vital to the SPEC OPI process.
- OPI logs are due weekly by noon on Monday. Partner/site will submit the completed log weekly to the relationship manager. If there is no OPI usage for the week, the partner/site will email the relationship manager saying there is no usage.



## **Procedure Change for Missing OPI Logs**

- Non-compliance will result in a warning email for the missing log. Further non-compliance will immediately deactivate the site/partner's OPI PIN for two weeks.
- Site coordinators or designees are responsible for submitting the weekly logs.



## **SPEC OPI Weekly Log**

- Each week, the local relationship manager reminds their partners to submit their weekly log by Monday at noon. If there is no OPI usage for the week, the partner/site will email the relationship manager saying there is no usage.
- If a partner or site fails to submit their weekly log, a reminder email will be sent for the first missed log. If the partner or site continues not submitting their weekly log, we will deactivate their assigned OPI PIN for two weeks.





## SPEC OPI Reconciliation Process

- SPEC is responsible for providing this free service.
- SPEC OPI process is essential. All individual calls must be matched to the monthly SPEC OPI bill. Each column on the log is matched to the bill with some variation.
- The SPEC OPI reconciliation process has a short turn-around time of three to five days.

1	BOD	Site ID	Site	State	Call D/T	Duration (Minutes)	Language	Total Cost	Seconds to connect
2	IRS SPEC	IRS_SPEC_A1_T3	IRS SPEC Area 1, Territory 3	GA	3/26/2024 2:30:00 PM	138	Russian	\$103.50	5
3	IRS SPEC	IRS_SPEC_A2_T7	IRS SPEC Area 2, Territory 7	GA	4/1/2024 10:05:42 AM	31	Iranian Farsi / Persian	\$23.25	10
4	IRS SPEC	IRS_SPEC_A2_T6	IRS SPEC Area 2, Territory 6	GA	4/1/2024 12:21:26 PM	4	Creole	\$3.00	3
5	IRS SPEC	IRS_SPEC_A1_T2	IRS SPEC Area 1, Territory 2	GA	4/1/2024 1:17:34 PM	22	Spanish	\$13.86	2
6	IRS SPEC	IRS_SPEC_A1_T4	IRS SPEC Area 1, Territory 4	GA	4/1/2024 1:5:02 PM	9	Spanish	\$5.67	2
7	IRS SPEC	IRS_SPEC_A2_T3	IRS SPEC Area 2, Territory 3	GA	4/1/2024 2:02:43 PM	58	Spanish	\$36.54	47
8	IRS SPEC	IRS_SPEC_A2_T3	IRS SPEC Area 2, Territory 3	GA	4/1/2024 2:06:48 PM	81	Spanish	\$51.03	122

### 2024 Weekly SPEC OPI Usage Log

SIDN	Site Name	Volunteer Caller Name	Call Date	Time Zone	Call Start Time	Duration (Minutes)	Language	Caller Phone No.
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# SPEC OPI Reconciliation Process

1	BOD	Site ID	Site	State	Call D/T	Duration (Minutes)	Language	Total Cost	Seconds to connect
2	IRS SPEC	IRS_SPEC_A1_T3	IRS SPEC Area 1, Territory 3	GA	3/26/2024 2:30:00 PM	138	Russian	\$103.50	5
3	IRS SPEC	IRS_SPEC_A2_T7	IRS SPEC Area 2, Territory 7	GA	4/1/2024 10:05:42 AM	31	Iranian Farsi / Persian	\$23.25	10
4	IRS SPEC	IRS_SPEC_A2_T6	IRS SPEC Area 2, Territory 6	GA	4/1/2024 12:21:26 PM	4	Creole	\$3.00	3
5	IRS SPEC	IRS_SPEC_A1_T2	IRS SPEC Area 1, Territory 2	GA	4/1/2024 1:17:34 PM	22	Spanish	\$13.86	2
6	IRS SPEC	IRS_SPEC_A1_T4	IRS SPEC Area 1, Territory 4	GA	4/1/2024 1:26:02 PM	9	Spanish	\$5.67	2
7	IRS SPEC	IRS_SPEC_A2_T3	IRS SPEC Area 2, Territory 3	GA	4/1/2024 2:02:43 PM	58	Spanish	\$36.54	47
8	IRS SPEC	IRS_SPEC_A2_T3	IRS SPEC Area 2, Territory 3	GA	4/1/2024 2:06:48 PM	81	Spanish	\$51.03	122
9	IRS SPEC	IRS_SPEC_A3_T1	IRS SPEC Area 3, Territory 1	GA	4/1/2024 2:42:41 PM	40	Mandarin	\$30.00	6
10	IRS SPEC	IRS_SPEC_A1_T5	IRS SPEC Area 1, Territory 5	GA	4/1/2024 4:07:07 PM	8	Spanish	\$5.04	13
11	IRS SPEC	IRS_SPEC_A1_T5	IRS SPEC Area 1, Territory 5	GA	4/1/2024 4:19:02 PM	27	Spanish	\$17.01	57
12	IRS SPEC	IRS_SPEC_A2_T3	IRS SPEC Area 2, Territory 3	GA	4/1/2024 4:24:09 PM	53	Spanish	\$33.39	2
13	IRS SPEC	IRS_SPEC_A1_T3	IRS SPEC Area 1, Territory 3	GA	4/1/2024 4:31:31 PM	1	Spanish	\$0.62	6

## 2024 Weekly SPEC OPI Usage Log

SIDN	Site Name	Volunteer Caller Name	Call Date	Time Zone	Call Start Time	Duration (Minutes)	Language	Caller Phone No.	
17	IRS SPEC	IRS_SPEC_A2_T3	IRS SPEC Area 2, Territory 3	GA	4/1/2024 5:57:20 PM	4	Russian	\$3.00	13
18	IRS SPEC	IRS_SPEC_A2_T7	IRS SPEC Area 2, Territory 7	GA	4/1/2024 6:14:08 PM	46	Arabic	\$34.50	13
		Detail	Breakdown by Category	Breakdown by Language	Unacco ...				

Each monthly SPEC OPI bill column is compared with the weekly SPEC OPI log. There may be some slight variations in some of the columns.



## Report OPI Usage

Partners will submit their OPI weekly usage log beginning the week of January 19, 2025, to their local relationship manager.

Weekly Input			
January	February	March	April
19 - 25	2 – 8	2 – 8	6 – 12
26 – (Feb) 1	9 - 15	9 – 15	13 - 19
	16 – 22	16 – 22	20 - 26
	23- (Mar) 1	23 - 29	
		30 – (Apr) 5	

Due Date is Every Monday by Noon.  
Relationship manager will follow-up with their assigned partners/sites weekly.



## **SPEC Over-the-Phone Interpreter (OPI) Services Reminders!**

- Partners/sites cannot preschedule appointments for SPEC OPI interpreter services. However, partners/sites can call the SPEC OPI line for assistance in scheduling a taxpayer's appointment for tax preparation services.
- All employees/partners (new or existing) must attend OPI training each year.
- For new partners/sites, request an OPI PIN from their relationship manager.



## **SPEC Over-the-Phone Interpreter (OPI) Services Reminders!**

- SPEC OPI certification will be on Link and Learn Taxes each year. Each partner/site must be certified yearly.
- If partners/sites are waiting for responses from their local relationship manager. Partners can send questions to [SPEC.OPI.Service@irs.gov](mailto:SPEC.OPI.Service@irs.gov).
- Partners/sites must first complete the volunteer standard of conduct (VSC) before taking the SPEC OPI training.



## **SPEC Over-the-Phone Interpreter (OPI) Services Reminders!**

- For returning partners/sites, your OPI PIN will automatically reactivate within ten days of completing OPI training. Partner/site coordinators with multiple sites can activate all needed OPI PINs with their relationship manager.
- Partners/sites are not allowed to preschedule appointments for OPI interpreter services. However, partners/sites can call the OPI line for assistance in scheduling a taxpayer's appointment for tax preparation services.





## **SPEC Over-the-Phone Interpreter (OPI) Services Reminders!**

- OPI services now include all aspects of the SPEC business model (income tax preparation, financial education, asset building (FEAB), and educational outreach). No additional authorization is required for tax return preparation.
- Written authorization is needed to use OPI services for anything other than tax return preparation—for example, FEAB, educational outreach, ITIN, CAA...etc. Written authorization is requested through your relationship manager.



## Over-the-Phone Interpreter (OPI) Services Form 13715

- When completing the Form 13715, Volunteer Site Information Sheet Question 7 - Languages offered write-in “Virtual Interpreter Services”. This will show on the VITA locator under languages offered.

Form <b>13715</b> (October 2021)	Department of the Treasury - Internal Revenue Service <b>Volunteer Site Information Sheet</b>	OMB Number 1545-2222
<b>Purpose:</b> The IRS toll-free assistance line and the VITA Site Locator Tool on <a href="https://irs.gov">irs.gov</a> use the information you provide on this form to help taxpayers locate the nearest volunteer tax preparation site. Fill-in the information below carefully and ensure it is accurate and complete. Return the completed form to your local IRS contact. <b>If the site information changes after submitting this form, please provide your local IRS contact with the updated information immediately.</b>		

7. Languages  
offered

Virtual Interpreter Services





**Taxpayer Service**

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## **Over-the-Phone Interpreter (OPI) Services Resources!**

### ➤ [Publication 5547 OPI Job Aid](#)

**Job Aid**



### **IRS Over-the-Phone Interpreter (OPI) Service**

for SPEC Partners, Site Coordinators, & Employees

### ➤ [Publication 5633 OPI Available Languages](#)



## **OVER-THE-PHONE (OPI) LANGUAGES**

Languages Represented



# Over-the-Phone Interpreter (OPI) Services Resources!

## ➤ [Form 15373 – OPI Poster](#)

**VITA/TCE Free Tax Preparation Using  
Over-the-Phone Interpreter (OPI) Services**  
We can help you in your language



## ➤ Pocket Guide





# Over-the-Phone Interpreter (OPI) Services Resources!

- Publication 5285 –  
IRS Interpreter  
Services Do You  
Speak (Language)  
(Tabletop Poster)



## Interpreter Services

**Translation of the text below:**  
"Do you speak [language]? We will provide an interpreter for you over the phone. There is no charge for this service."



<b>Arabic</b> العربية هل تتكلم اللغة العربية؟ سوف نوفر لك مترجم على الهاتف. هذه خدمة مجانية.	<b>American</b> 阿美利加 Tawaf hawajiyatka jamaana? A kufi: Ukwafu aha hawajiyatka jamaana? hawajiyatka jamaana.
<b>Cantonese</b> 廣東話 你話廣東話嗎？我們可以為你提供電話翻譯。這服務是不收費的。	<b>French</b> français Parlez-vous français ? Nous pouvons vous offrir les services d'un interprète au téléphone. Ce service est gratuit.
<b>German</b> Deutsch Sprechen Sie Deutsch? Wir stellen Ihnen telefonisch einen Dolmetscher zur Verfügung. Dieser Service ist kostenlos.	<b>Hindi</b> हिन्दी क्या आप हिन्दी बोलते हैं? हम आप के बिना भी आप पर दूरवार्तासे हिन्दी बोलने में मदद कर सकते हैं। यह सेवा मुफ्त है।
<b>Creole</b> Kreyòl Eske ou pale Kreyòl? Nou va bay ou yon entèprèt pa telefòn. Pa gen okenn chaj pou sèvis sa a.	<b>Italian</b> Italiano Parlate Italiano? Un interprete da noi fornito vi assisterà durante la telefonata. Il servizio è gratuito.
<b>Japanese</b> 日本語 日本語をお話しますか？電話での通訳をします。無料サービスです。	<b>Khmer</b> ភាសាខ្មែរ តើអ្នកនិយាយភាសាខ្មែរឬទេ? យើងនឹងផ្តល់អ្នកបកប្រែជូនអ្នក តាមទូរស័ព្ទ។ ពុំមានគិតថ្លៃទេ សេវានេះឥតគិតថ្លៃ។
<b>Korean</b> 한국어 당신은 한국말을 사용하십니까? 저희가 전화상으로 한국말 통역을 도와드릴 통역사를 제공해 드리겠습니다. 이 서비스는 무료입니다.	<b>Somali</b> Soomaaliga Ma ku hadashaa afka Soomaaliga? Waxaan ku haynaa turjumaan telefoonka kugula jiraya. Kharash ma laha adeeggana.
<b>Mandarin</b> 普通话 你会说普通话吗？我们可以为您提供电话上的普通话。 此服务是免费的。	<b>Polish</b> Polski Czy mówią Państwo po polsku? Zapewnimy Państwu tłumacza przez telefon. Ta usługa jest bezpłatna.
<b>Portuguese</b> Português Você fala Português? Vamos fornecer um intérprete para você por telefone. Não há custos para este serviço.	<b>Russian</b> Русский язык Вы говорите по-русски? Мы предоставим Вам переводчика по телефону. Эта услуга оказывается бесплатно.
<b>Spanish</b> Español ¿Habla Español? Le proveeremos un intérprete por teléfono. Este servicio es gratis.	<b>Tagalog</b> Tagalog Nagpapalita ka ba ng Tagalog? Magbibigay kami ng tagapag-salin sa pamamagitan ng telepono. Walang bayad ang serbisyo ng ito.
<b>Thai</b> ภาษาไทย คุณพูดภาษาไทยหรือไม่? เราจะจัดหาคนให้คุณผ่านทางโทรศัพท์ บริการนี้ไม่มีค่าใช้จ่าย	<b>Vietnamese</b> TIENG VIET Quý vị nói tiếng Việt phải không? Chúng tôi sẽ cung cấp một người Thông Dịch Việt Nam bằng điện thoại. Dịch vụ này sẽ được miễn phí cho Quý V.

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## **Additional References**

- [Publication 5883 –SPEC OPI Training](#)
- [Publication 5547 – SPEC OPI Job Aid](#)
- [Publication 5633 – OPI Available Languages](#)
- [Form 15373 – OPI Poster](#)
- [Publication 4269 – Welcome! Do You require service in any language other than English?](#)
- [Publication 5285 – IRS Interpreter Services \(DeskTop\)](#)
- [Publication 5889 - LionBridge Pocket Guide](#)
- SPEC OPI Weekly Log – contact your relationship manager
- [Site Coordinator Corner](#)