

IRS Over-the-Phone Interpreter (OPI) Service

for SPEC Partners, Site Coordinators & Employees

Mission

To assist limited English proficient (LEP) taxpayers comply with their federal tax obligation, the IRS offers translation interpreter services at every VITA/TCE return preparation site.

Background

The IRS is dedicated to servicing our multilingual customers by offering over-the-phone interpreter (OPI) services in LEP communities. OPI is a federally funded program.

OPI offers real-time interpretation services for numerous languages (Attachment 1). Virtual call centers are open 24 hours a day, year-round. The SPEC OPI service is free and available to all VITA/TCE partners.

OPI services are used in all aspects of the SPEC business model, including:

- Income tax return preparation
- Return and Quality site reviews
- Field site visits
- ITIN applications
- Financial education and asset building (FEAB) services
- Outreach and education: Child Tax Credit, Earned Income Tax Credit, education credits, identity theft, refund inquiries, questions about IRS correspondence, etc.

If partners want to use OPI services for purposes other than return preparation, they must obtain prior written authorization from the partner/site. The request must be sent to the relationship manager (RM) to obtain approval.

Contact your relationship manager if you are interested in participating in OPI services. If you are not sure who this is, please send a message to

***SPEC.OPI.Service@irs.gov.**

What is Needed

- An OPI assigned personal identification number (PIN) – OPI PINs cannot be shared.
- Phone access - VITA/TCE landline or a partner provided cell phone, or volunteer's personal cell phone that allows 3-way calling.
- OPI Tracking Sheet – To be completed by the volunteer.

How To Use Over-The-Phone Interpreter Service

- **Step 1:** A certified VITA/TCE volunteer will call the taxpayer.
- **Step 2:** The volunteer will call the interpreter's toll-free line at 1-877-384-4474. Using three-way calling, the phone lines will merge to form a conference call with the taxpayer, the volunteer and the interpreter.
- **Step 3:** After completing OPI training, the volunteer will enter the unique personal identification number (PIN) assigned to them.
- **Step 4:** Press number for preferred language:
 - Press 1 for Spanish
 - Press 2 for Haitian Creole
 - Press 3 for Mandarin
 - Press 4 for Russian
 - Press 5 for Portuguese
 - Press 6 for Arabic
 - Press 7 to speak with an operator
 - For other languages, press 0, then say the language name or enter the first three letters on your keypad.
- **Step 5:** Secure the interpreter's name and identification number, PIN or phone number.
- **Step 6:** After all questions are answered, the volunteer ends the call and completes the OPI log (Attachment 2).
- **Step 7:** All volunteers will give their OPI log to the site coordinator.
- **Step 8:** The site coordinator will merge all data to one form and send their completed OPI log to their relationship manager weekly.

Partner/Site Responsibility

The volunteers, partners and site coordinators will:

- complete annual SPEC OPI training on Link & Learn Taxes (LLT).
- track each call on the weekly SPEC OPI log in its entirety
- submit the completed log weekly to the relationship manager. If there is no OPI usage for the week, the partner/site will provide an email to the relationship manager saying there is no usage
- assist with the reconciliation of SPEC OPI logs monthly

SPEC Relationship Manager Responsibility

The relationship managers will:

- complete annual SPEC OPI training on Link & Learn Taxes (LLT).
- request SPEC OPI PINs timely for activation or deactivation
- promptly respond to partner/site inquiries in a timely manner
- follow up with their assigned partners/sites weekly for OPI usage
- ensure partners/sites are completing the log accurately
- send completed SPEC OPI logs to their territory subject matter expert
- ensure SPEC OPI logs are reconciled timely each month, and obtain any missing logs

Territory Subject Matter Expert (SME) Responsibility

The subject matter expert will:

- complete annual SPEC OPI training in Link and Learn
- request SPEC OPI PINs timely for activation or deactivation
- remind relationship managers weekly to follow up with their partner/site of the responsibility to submit the weekly SPEC OPI logs
- input all weekly territory logs on the SPEC OPI SharePoint
- ensure SPEC OPI logs are monthly reconciled in a timely manner and obtain any missing logs.

Territory Manager Responsibility

The territory managers will:

- complete annual SPEC OPI training on Link & Learn Taxes (LLT).
- ensure logs are uploaded to OPI SharePoint and completed accurately each week

- ensure SPEC OPI logs are reconciled in a timely manner each month and obtain any missing logs.
- submit SPEC OPI log to area point of contact
 - **Area 1:** Grace Torres – Grace.Toress@irs.gov
 - **Area 2:** Joe Hayek – Joseph.P.Hayek@irs.gov
 - **Area 3:** Sandra Cobos – Sandra.D.Cobos@irs.gov

Area Point of Contact Responsibility

The area point of contact will:

- complete annual SPEC OPI training on Link & Learn Taxes (LLT).
- ensure all SPEC OPI PINs are requested timely for activation or deactivation
- promptly respond to partner/site inquiries in a timely manner
- weekly remind relationship managers to contact partners/sites for the SPEC OPI log usage
- verify the accuracy of the weekly SPEC OPI logs from subject matter experts/territory manager
- confirm that weekly logs are uploaded accurately on the SPEC OPI SharePoint
- ensure SPEC OPI logs are reconciled and certified timely each month.

Field Support & Analysis (FS&A) Responsibility

FS&A will:

- complete annual SPEC OPI training on Link & Learn Taxes (LLT).
- ensure the SPEC OPI log is reconciled timely with the OPI bill
- ensure the SPEC OPI log is posted to the SharePoint
- FS&A points of contact are:
 - **Primary:** Phoebe Walton– Phoebe.Walton@irs.gov
 - **Back-up:** Tami Mierzwiak – Tamra.L.Mierzwiak@irs.gov

Attachment 1:

 OVER-THE-PHONE INTERPRETER (OPI) Languages Represented				
Albanian	French	Khmer/Cambodian	Portuguese	Taiwanese
Amharic	French Canadian	Kinyarwanda	Punjabi	Tamil
Arabic	Fukienese	Kirundi	Quechua	Telugu
Aramaic	Georgian	Korean	Quichua, Canar Highland	Thai
Armenian	German	Kurdish	Quichua, Chimborazo Highland	Tigrinya
Armenian, Western	Gheg Albanian	Lebanese Arabic	Quichua, Salasaca Highland	Tosk Albanian
Assyrian	Gorani	Lingala	Romanian	Turkish
Azerbaijani	Gujarati	Lusoga	Russian	Twi
Bengali	Hakka (Chinese)	Mandarin	Shanghai	Uighur
Bravanese	Haryanvi	Marshallese	Sinhalese	Ukrainian
Burmese	Hebrew	Maymay	Somali	Urdu
Cambodian/Khmer	Hindi	Mixtec	Sorani	Uzbek
Cantonese	Hunan	Moldovan	Spanish	Vietnamese
Cebuano	Indonesian	Mongolian	Swahili	Visayan
Chaldean	Iranian Farsi/Persian	Nepali	Szechuan	Wolof
Creole	Italian	North African Arabic	Tagalog	Yiddish
Darsi/Farsi	Japanese	Pashto		
Farsi – Afghani – Dari	Karen Segaw	Polish		

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Attachment 2:

	A	B	C	D	E	F	G	H	I	J	K
1	Weekly SPEC OPI Usage Log										
2	SIDN	Site Name	Volunteer Caller Name	Call Date	Time Zone	Call Start Time	Duration (Minutes)	Language	Caller Phone No.	Interpreter No.	Usage/Comments
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OPI Tracking (+)

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