



Taxpayer Services

STAKEHOLDER PARTNERSHIPS, EDUCATION & COMMUNICATION

SPEC Over-the-Phone Interpreter (OPI) Service Training



SPEC Over-the-Phone (OPI) Interpreter Service

Objectives:

1. SPEC OPI background
2. Understanding the SPEC OPI services
3. How to use the SPEC OPI telephonic interpretation service
4. Understanding the SPEC OPI process
5. Completing and reporting the weekly SPEC OPI log
6. Completing the Form 13615



OPI Background

The IRS is committed to servicing our multilingual customers by offering SPEC Over-the-Phone Interpreter (OPI) services in limited English proficient (LEP) communities. SPEC OPI is a federally funded program.

SPEC OPI offers real-time interpretation services for numerous languages through virtual call centers, enabling around the clock service year-round. The SPEC OPI service is free and available to all Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) partners/sites.



SPEC OPI Services

SPEC OPI services includes all aspects of the SPEC business model.

Examples include:

- Quality site reviews
- Field site visits
- Return reviews
- FEAB services
- Individual Taxpayer Identification Number (ITIN) applications
- Outreach and education – such as Child Tax Credit, Earned Income Tax Credit, education credits, identity theft, refund inquiries, questions about IRS correspondence, etc.

NOTE: If a partner want to use SPEC OPI services for something other than return preparation, prior written authorization is required from SPEC. To obtain approval the request must be sent to the relationship manager (RM) and area OPI point of contact/subject matter expert (POC/SME).



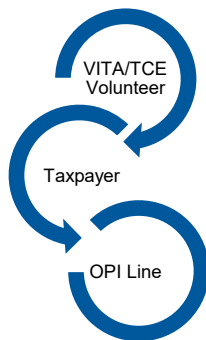
SPEC OPI Services (cont.)

Examples of Tax Preparation Situations:

- **Scheduling tax return preparation appointments**
- **Intake/interview process**
- **Questions**
- **Resolving rejected returns**
- **Conducting quality review**



SPEC OPI Telephonic Interpretation Service



This is a visual of the SPEC OPI telephonic interpretation service. The site needs to have conference call abilities (3-way-calling) to use the SPEC 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 SPEC OPI line.



Over-the-Phone Interpreter (OPI) Service **For SPEC OPI Partners**



Step 1

Volunteer calls the taxpayer.



Step 2

With the volunteer and taxpayer on the line, volunteer calls the interpreter toll-free at (877)384-4474.



Step 3

Once connected, you will hear:

“ Welcome. For interpretation services, please say or enter your PIN followed by #.”





Over-the-Phone Interpreter (OPI) Service **For SPEC OPI Partners**

Step 4

Select Your Language



Use the following quick-dial options:

Press **1** for Spanish

Press **5** for Portuguese

Press **2** for Haitian Creole

Press **6** for Arabic

Press **3** for Mandarin

Press **7** to speak with an operator

Press **4** for Russian

For other languages, press 0, then say the language name or enter the first three letters on your keypad.

Step 5

Begin the session:

The interpreter will introduce themselves with their name and interpreter ID number.



Over-the-Phone Interpreter (OPI) Service **For SPEC OPI Partners**



Step 6

Ending the Call:

Simply hang up when interpretation is no longer needed. Billing stops when the call disconnects.

Note:

Do not forget to enter each call on the SPEC OPI weekly log.

If you have questions or need assistance, contact your local relationship manager or email SPEC.OPI.Service@irs.gov.





Tips For Working With Taxpayers

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



- ▶ Eliminate any background noise.
- ▶ Speak slowly and have patience with the taxpayer.
- ▶ Remember, your conversation is with the taxpayer and not the interpreter.
- ▶ If in person, maintain eye contact with the taxpayer.
- ▶ If in person, observe the taxpayer's body language.
- ▶ 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 the OPI line for interpreter assistance.



- ▶ Briefly explain the purpose of the call.
- ▶ Eliminate any background noise.
- ▶ Speak at a moderate rate of speech and instruct your parties to speak one at a time.
- ▶ The interpreter serves to facilitate communication, he/she will not **conduct** the call itself.
- ▶ Please contact your SPEC relationship manager with any questions or concerns.



SPEC OPI Roles and Responsibilities

Volunteer – required to submit logs on a weekly basis to SC.

Site Coordinator (SC) – required to secure weekly logs, maintain monthly accountability for reconciliation and submit logs to RM.

Partner – will verify the SC is securing weekly logs and maintaining monthly reconciliation.

Relationship Manager (RM) – required to secure weekly logs from SC and send it to the SME/TM, maintain monthly accountability for reconciliation and obtain any missing logs for TM/SME.

Territory Manager (TM)/ Territory OPI SME – required to upload the weekly logs to the Area OPI SharePoint. TM/SME will certify call logs received each month.

Note: Volunteers, site coordinators, partners, relationship managers and territory managers will complete SPEC OPI training on Link and Learn Taxes yearly.



SPEC OPI Process

- SPEC OPI certification is on Link and Learn Taxes (LLT) each year. Each parter/site must certify yearly.
- The prerequisite for the SPEC OPI course is the Volunteer Standards of Conduct training.
- Before taking the SPEC OPI training, you are required to enter a valid Site Identification Number (SIDN).
- The SPEC OPI training has the requirement of passing with an 80% or higher score.



SPEC OPI Process

- For new or returning partners/sites:
 - After completing OPI training your OPI PIN will automatically reactivate within 10 days after passing the course.
 - 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 to schedule an appointment for a taxpayer to come in for tax preparation services.



SPEC OPI Process

- An activation email will be sent to the site coordinator, relationship manager and territory manager with the site SPEC OPI PIN information and the Weekly SPEC OPI Log.
- Each SPEC partner/territory has an assigned SIDN and SPEC OPI PIN.
 - If a SPEC partner/employee needs their SIDN or OPI PIN, contact your TM/OPI SME.
 - If a TM/OPI SME needs their SIDN or OPI PIN, contact their Area Point of Contact (APOC).



SPEC OPI Weekly Log

- Each week the local relationship manager will remind their partners to submit their weekly log by noon on Monday. If the partner has no usage they will send a negative response to their local relationship manager.

SPEC OPI Weekly Log									
SIDN ▾	Site Name ▾	Volunteer Caller Name ▾	Call D ▾	Time Zone ▾	Call Start t ▾	Duration (Minutes) ▾		Language ▾	Caller Phone ▾



SPEC OPI Weekly Log

- 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 to not submit their weekly log, we will deactivate their assigned OPI PIN for two weeks.
- Non-compliance will result in a warning email for the missing log. Further non-compliance will lead to the immediate deactivation of the site/partner's OPI PIN for two weeks.







Time Zone

Enter Time

Enter Call Length

Enter Language

Time Zone
Select time zone where the call was made.



Enter Caller Phone Number

Write comments

[illegible]

- No interpreter for language requested.
- Return out of scope.
- Call dropped, had to call back.
- Time to connect with interpreter was too long.



SPEC OPI Weekly Schedule

Partners will submit their SPEC OPI weekly log beginning the week of January 19, 2026, 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	

Logs are due every Monday by noon your local time.
Relationship managers will follow-up with their
partners/sites weekly.



SPEC OPI Process: Reconciliation

- 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.



SPEC OPI Process: Reconciliation

	BOD	Site ID	Site	State	Call D/T	Duration (Minutes)	Language	Total Cost	Seconds to connect
1	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
2	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
3	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
4	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
5	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
6	IRS SPEC	IRS_SPEC_A2_T2	IRS SPEC Area 2, Territory 2	GA	4/1/2024 2:02:42 PM	58	Spanish	\$26.54	47
7	IRS SP	Weekly SPEC OPI Log							
8	IRS SP	SIDN	Site Name	Volunteer Caller Name	State	Call D/T	Durations (Minutes)	Language	Caller Phone No.
9	IRS SP	SXXXXXXX	Hillcrest CUC	Alma Dalton	GA	4/1/2024 12:21pm	4	Creole	770-997-XXXX
10	IRS SP	SXXXXXXX	Sam NUN	Sam Cooke	GA	4/1/2024 2:00pm	25	Spanish	678-360-XXXX
11	IRS SPEC	IRS_SPEC_A1_T3	IRS SPEC Area 1, Territory 3	GA	4/1/2024 4:31:21 PM	1	Spanish	\$0.63	6
12	IRS SPEC	IRS_SPEC_A1_T3	IRS SPEC Area 1, Territory 3	GA	4/1/2024 4:33:03 PM	57	Spanish	\$35.91	14
13	IRS SPEC	IRS_SPEC_A2_T6	IRS SPEC Area 2, Territory 6	GA	4/1/2024 5:15:40 PM	55	Creole	\$41.25	8
14	IRS SPEC	IRS_SPEC_A2_T3	IRS SPEC Area 2, Territory 3	GA	4/1/2024 5:26:48 PM	6	Spanish	\$3.78	15
15	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
16	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
17	Detail Breakdown by Category Breakdown by Language Unacco ...								

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



Area POC's:

Area 1:

Grace Torres

Grace.Torres@irs.gov

Area 2:

Joe Hayek

Joseph.P.Hayek@irs.gov

Area 3:

Sandra Cobos

Sandra.D.Cobos@irs.gov



SPEC OPI 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 13715 (October 2022)	Department of the Treasury - Internal Revenue Service Volunteer Site Information Sheet	OMB Number 1545-2222
Purpose: The IRS toll-free assistance line and the VITA Site Locator Tool on irs.gov 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. If the site information changes after submitting this form, please provide your local IRS contact with the updated information immediately.		

Site Information

7. Languages offered

Virtual Interpreter Services



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STAKEHOLDER PARTNERSHIP EDUCATION & COMMUNICATION

SPEC OPI 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



SPEC OPI Resources (cont.)

➤ 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) Service For SPEC OPI Partners

- 1 Dial the Toll-Free Number:**
Primary (Preferred): +1 (877) 384-4474

Once connected, you will hear:
"Welcome. For interpretation services, please say or enter your PIN followed by #."
 - 2 Enter Your Assigned PIN:**
The system will confirm your code before proceeding.

You will hear:
"Welcome to Ad Astra. Please select the language for interpretation services by speaking or typing the number.
You can also speak or type zero at any time to leave the Quick Dial list and choose another language."
 - 3 Select your Language:**
Use the following quick-dial options:
Press 1 for Spanish Press 5 for Portuguese
Press 2 for Haitian Creole Press 6 for Arabic
Press 3 for Mandarin Press 7 to speak with an operator
Press 4 for Russian
For other languages, press 0, then say the language name or enter the first three letters on your keypad.
 - 4 Begin the Session:**
 - The interpreter will introduce themselves with their name and interpreter ID number.
 - You may ask the interpreter to conference in a third party; just provide the phone number of the person you would like to add to the call.
 - 5 Ending the Call:**
 - Simply hang up when interpretation is no longer needed.
 - Billing stops when the call disconnects.
- Note:**
Do not forget to enter each call on the SPEC OPI weekly log.
If you have questions or need assistance, contact your local relationship manager or email SPEC.OPI.Service@irs.gov



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STAKEHOLDER PARTNERSHIP EDUCATION & COMMUNICATION

SPEC OPI Resources (cont.)

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



Over-the-Phone Interpreter (OPI) Service

Language	Target Language	Do you speak [target language]? We will provide an interpreter for you over the phone. There is no charge for this service.
Amharic	አማርኛ	አማርኛ ተናጋሪ የሆነ ሰውን የድርጅቱ አገልግሎት ለመስጠት እንዲረዱን እንጠይቃለን፡፡
Arabic	العربية	هل تتحدث اللغة العربية؟ سوف نوفر لك مترجماً فورياً عبر الهاتف. لا توجد رسوم مقابل هذه الخدمة.
Armenian	Հայերեն	Դուք Հայերեն խոսո՞ւմ ե՞ս: Մենք մեզ հետևյալստեղծ քարտուսարները կօգտագործենք: Այս ծառայությունը անվճար է:
Bengali	বাংলা	বাংলা কি বলতে পারেন? আমরা একটি বাংলা-ইংরেজি বা ইংরেজি-বাংলা সেবা প্রদান করছি। এই সেবাটি ফ্রি।
Burmese	မြန်မာ	သင်မြန်မာစကားပြောနိုင်သလား? မြန်မာ(မြန်မာ)နှင့် သင်အတွက် ကောင်းပြန်သောစကားပြောသူများ ထောက်ပံ့ပေးပါမည်။
Cantonese	廣東話	您話廣東話嗎? 我們可以為您提供電話翻譯。這服務是不收費的。
Creole	Kreyòl	Eskè ou pale Kreyòl? Nou ap ba ou yon entèprèt pa telefòn. Sèvis sa a gratis.
Dari/Farsi	دری	آیا شما دری صحبت می کنید؟ ما یک مترجم تلفنی به شما ارائه خواهیم کرد. این سرویس رایگان است.
French	Français	Parlez-vous français? Nous pouvons vous offrir les services d'un interprète au téléphone. Ce service est gratuit.
German	Deutsch	Sprechen Sie Deutsch? Wir stellen Ihnen telefonisch einen Dolmetscher zur Verfügung. Dieser Service ist kostenlos.
Hindi	हिन्दी	चा आर हिन्दी बोलते हैं? हम आपके लिए चार एक दुर्लभ सेवा प्रदान करेंगे। इस सेवा के लिए कोई शुल्क नहीं है।
Iranian/Farsi/Persian	فارسی	آیا به زبان فارسی صحبت می‌کنید؟ ما مترجمی شفاهی یا از طریق تلفن در اختیار شما قرار می‌دهیم این خدمات رایگان است.
Italian	Italiano	Parla italiano? Un interprete da noi fornito ti assisterà durante la telefonata. Il servizio è gratuito.
Japanese	日本語	日本語での対応が可能です。お電話での通訳サービスも無料でご利用いただけます。
Khmer	ខ្មែរ	ស្រីអ្នកនិយាយខ្មែរឬទេ? យើងនឹងផ្តល់សេវាបកប្រែសម្រាប់អ្នកប្រើប្រាស់ទូរស័ព្ទ។ តម្លៃសេវានេះសូន្យ។
Kinyarwanda	Kinyarwanda	Ese uwaga kinyarwanda? Tuzagushakira umusomezi kuri telefoni. Nta mafanga uzabwirako kuri iyi serivisi.
Korean	한국어	귀하는 한국어 사용자입니까? 저희가 전화상으로 한국어 통역을 도와드릴 통역사를 제공에 드리겠습니다. 이 서비스는 무료입니다.
Mandarin	普通话	您会讲普通话吗? 我们可以为您提供电话口译。这一服务是免费的。
Nepali	नेपाली	के नेपाली भन्नुहुन्छ? हामी तपाईंको लागि नेपाली-इंग्लिस र इंग्लिस-नेपाली दुवै सेवा प्रदान गर्दछौं।
Pashto	پښتو	که په پښتو خبرې کوئ؟ موږ به تاسو ته په تلفون کې یو ژباړونکی وړاندې کړو. د دې خدمت لپاره هیڅ کوس نشته.
Polish	Polski	Czy mówię po polsku? Zapewnimy Państwu tłumacza przez telefon. Ta usługa jest bezpłatna.
Portuguese	Português	Você fala Português? Vamos fornecer um intérprete para você por telefone. Não há custos para este serviço.
Russian	Русский	Вы говорите по-русски? Мы предоставим Вам переводчика по телефону. Эта услуга оказывается бесплатно.
Somali	Soomaaliga	Somali ma ku hadashaa? Waxaan ku ahi doonaa furjumaan telefaanka. Ma jiro wax lacag ah oo adeegan ah.
Spanish	Español	¿Habla español? Le proporcionaremos un intérprete por teléfono. Este servicio es gratuito.
Swahili	Kiswahili	Ji, unazungumza Kiwaha? Tutatoa mwalimu kupitia simu. Hakuna malipo kwa huduma hii.
Tagalog	Tagalog	Nagasaala ka ba ng Tagalog? Magbibigay kami ng tagapegaal sa pamamagitan ng telepono. Walang bayad ang serbiyong ito.
Thai	ภาษาไทย	คุณพูดภาษาไทยหรือไม่? เราจะจัดหาผู้แปลภาษาให้ฟรีผ่านทางโทรศัพท์
Tigrinya	ትግርኛ	ወይ ንኩሽ ልኡ ትግርኛ ብሃልዮ? ኖሞ ስለዚህም እኛ ንኩሽ ልኡ ትግርኛ ስራዊት ነፃ
Vietnamese	Tiếng Việt	Quý vị có nói tiếng Việt không? Chúng tôi sẽ cung cấp một thông dịch viên cho quý vị qua điện thoại. Dịch vụ này là miễn phí.



SPEC OPI Services Reminders

- SPEC OPI certification will be on Link and Learn Taxes(LLT) each year.
 - All employees/partners (new or existing) must attend OPI training each year.
 - Partners/sites must take the volunteer standard of conduct (VSC) first before taking the SPEC OPI training.
- Before taking the SPEC OPI training, you are required to enter a Site Identification Number (SIDN).
 - If you don't know your SIDN or OPI PIN contact your local relationship manager (RM).



SPEC OPI Services Reminders

- If partners/sites are not getting responses from their local relationship manager, they can send questions to SPEC.OPI.Service@irs.gov.
- Partners/sites are not allowed to preschedule appointments for SPEC OPI interpreter services. However, partners/sites can call the SPEC OPI line for assistance to schedule an appointment for a taxpayer to come in for tax preparation services.



SPEC OPI Services Reminders

- OPI services will now include all aspects of the SPEC business model (income tax preparation, financial education and 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.



SPEC OPI Services Reminders

- For a new partner or site: contact your relationship manager to request a new SPEC OPI PIN. After a SPEC OPI PIN is assigned, the SPEC OPI PIN will be activated 10 days **after** the OPI training in Link and Learn Taxes is passed.
- For a returning partner or site: SPEC OPI PIN will be activated 10 days **after** the OPI training in Link and Learn Taxes is passed.



SPEC OPI Services Reminders

- Activation email will be sent to the site coordinator, relationship manager and territory manager with the site SPEC OPI PIN information and the Weekly SPEC OPI Usage Log.
- Multiple sites: the partner or site coordinator need to contact their relationship manager to activate SPEC OPI PINs.



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 - Ad Astra Pocket Guide](#)
- SPEC OPI Weekly Log – contact your relationship manager
- [Site Coordinator Corner](#)