Job Aid

September 2024

IRS Over-the-Phone Interpreter (OPI) Service

for SPEC Partners, Site Coordinators, & Employees

Mission

To assist Limited English Proficient (LEP) taxpayers with complying with their federal tax obligation by preparing their tax returns accurately, the IRS organization now 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 include all aspects of the SPEC business model. This will include income tax return preparation, educational outreach, financial education, and asset building (FEAB) information. Examples include:

- Quality site reviews
- Field site visits
- Return reviews
- ITIN applications
- FEAB services
- Outreach and education – such as Child Tax Credit, Earned Income Tax Credit, education credits, identity theft, refund inquiries, questions about IRS correspondence, and so on.

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.
- VITA/TCE landline, partner provided cell phone, or volunteer's personal cell phone, if desired, which allows a 3-way call.
- 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 1-888-563-1155; then, 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 appropriate language:
  - 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 O for operator assistance.
- **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.
- **Step 9:** The site coordinator will send their completed OPI log to their relationship manager weekly.

Partner/Site Responsibility

Volunteers, partners, and site coordinators will:

- complete annual OPI training on Link & Learn
- 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 OPI logs monthly

SPEC Relationship Manager Responsibility

Relationship managers will:

- complete annual OPI training on Link & Learn
- request OPI PINs timely for activation or deactivation
- promptly respond to partners/sites' 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 OPI logs to their territory subject matter expert
- ensure OPI logs are reconciled in a timely each month

Territory Subject Matter Expert (SME) Responsibility

Subject Matter Expert will:

- complete annual OPI training in Link and Learn
- request 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 SPEC OPI logs on the SPEC OPI SharePoint

Territory Manager Responsibility

Territory managers will:

- complete annual OPI training on Link & Learn

- ensure OPI logs are uploaded to OPI SharePoint and completed accurately each week
- ensure OPI logs are reconciled in a timely each month
- submit OPI log to area point of contact
  - **Area 1:** Burnell Stepter – **Burnell.X.Stepter@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

Area point of contact will:

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

Field Support & Analysis (FS&A) Responsibility

FS&A will:

- complete annual OPI training on Link & Learn
- ensure the OPI log is reconciled in a timely with the OPI bill
- ensure the OPI log is posted to the SharePoint
- FS&A points of contact are:
  - **Area 1:** Katoria Turner – **Katoria.P.Turner@irs.gov**
  - **Area 2:** Phoebe Walton– **Phoebe.Walton@irs.gov**
  - **Area 3:** Rebecca Smith – **Rebecca.Smith@irs.gov**

Attachment 1:

IRS

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		

Publication 5633 (Rev. 8-2024) Catalog Number 92880M Department of the Treasury **Internal Revenue Service** www.irs.gov

Attachment 2:

Weekly SPEC OPI Usage Log

SIDN	Site Name	Volunteer Caller Name	Call Date	Time Zone	Call Start Time	Duration (Minutes)	Language	Caller Phone No.	Interpreter No.	Usage/Comments

OPI Tracking

Attachment 2 (Breakdown):