SPEC Over-the-Phone Interpreter (OPI) Service for SPEC Partners, Site Coordinators, and Employees

Mission

To assist Limited English Proficient (LEP) taxpayers with complying with their federal tax obligation by preparing their tax returns accurately, SPEC is now offering translation interpreter services at every VITA/TCE return preparation site.

Background

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

OPI offers real-time interpretation services for 120 languages, (Attachment 1). Virtual call centers, enabling around the clock service, are available all day 365 days a year. The OPI service is free to all VITA/TCE partners/sites.

OPI Service is available to all partners/sites. If you are interested in participating contact your relationship manager. If you are not sure who this is, please send a message to *SPEC.OPI.service@irs.gov*

What is Needed

- OPI Assigned personal Identification number – Can only be used for taxpayers requiring translator services at VITA/TCE sites. OPI PINs cannot be shared.
- VITA/TCE landline or cell phone which allows a 3-way call. Optional: volunteers
- Can use their own personal cell phone to merge 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 on their toll-free line (1-888-563-1155), then merge the phone lines to form a conference call with the taxpayer, the volunteer, and the interpreter
- **Step 3:** The volunteer will enter the preassigned unique personal identification number (PIN assigned after completing OPI training)
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- **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 0 for operator assistance

- **Step 5:** Secure the interpreters Name and Number (PIN or Phone#)

- **Step 6:** After all questions are answered. Volunteer ends the call. Volunteer completes 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, Partner & Site Coordinators will attend OPI training
- Partner will track each call on the OPI log per instance in its entirety
- Partner will submit the completed log weekly to the Relationship Manager
- Partner will assist with the reconciliation of OPI Logs

**SPEC Relationship Manager Responsibility**

- Relationship Manager will attend OPI training with their partner
- Relationship Manager will follow-up with their assigned sites weekly
- Relationship Manager will ensure sites are completing the log accurately
- Relationship manager will send completed OPI Logs to their territory manager
- Relationship manager will ensure OPI Logs are reconciled timely monthly
Territory Manager Responsibility

- Territory managers will attend OPI training
- Territory managers will ensure OPI log completed accurately weekly
- Territory managers will 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
- Territory manager ensure OPI logs reconciled timely monthly

FS&A Responsibility

- FS&A will ensure OPI Log is reconciled timely with OPI bill
- FS&A will ensure OPI Log posted to the SharePoint
- FS&A points of contact are:
  - Area 1 Katoria Turner - Katoria.P.Turner@irs.gov,
  - Area 2 Lisa Madden - Lisa.A.Madden@irs.gov
  - Area 3 Rebecca Smith - Rebecca.Smith@irs.gov
- FS&A will assign OPI PINs.
### SPEC Over-the-Phone Interpreter (OPI) Service for SPEC Partners, Site Coordinators, and Employees

#### Attachment 2 (Breakdown)

**Wage and Investment**

**STAKEHOLDER PARTNERSHIP EDUCATION & COMMUNICATION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIDN</td>
<td>Enter SIDN</td>
</tr>
<tr>
<td>Site Name</td>
<td>Enter Name of Site</td>
</tr>
<tr>
<td>Site City</td>
<td>Enter City</td>
</tr>
<tr>
<td>Site Date</td>
<td>Select State</td>
</tr>
<tr>
<td>Volunteer Caller Name</td>
<td>Print Volunteer Name</td>
</tr>
</tbody>
</table>

**Call Date**

<table>
<thead>
<tr>
<th>Call Date</th>
<th>Call Start Time</th>
<th>Did You Connect to an Interpreter?</th>
<th>Duration (Minutes)</th>
<th>Language</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Yes/No</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enter Yes or No</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enter Call Length</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Caller Phone No.**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caller Phone Number</td>
<td>Enter Caller Phone Number</td>
</tr>
<tr>
<td>Interpreter No.</td>
<td>Enter Interpreter’s ID#</td>
</tr>
<tr>
<td>Interpreter Name</td>
<td>Enter Interpreter’s Name</td>
</tr>
<tr>
<td>Seconds to connect</td>
<td>Enter Wait Time Before Connection</td>
</tr>
</tbody>
</table>

**Reason for Call**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Reason for Call</td>
<td>List of reasons</td>
</tr>
<tr>
<td>Enter Yes or No</td>
<td></td>
</tr>
<tr>
<td>Write comments</td>
<td></td>
</tr>
</tbody>
</table>

**Return Completed**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Yes or No</td>
<td></td>
</tr>
</tbody>
</table>

**Comments**

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

Comment Examples: