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

Publication 5883 (11-2023) Catalog Number 94456C Department of the Treasury Internal Revenue Service www.irs.gov

Over-the-Phone (OPI) Interpreter

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 committed 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 several languages through virtual call centers, enabling around the clock service year-round. The OPI service is free and available to all VITA/TCE partners.

All employees/partners must complete the annual OPI training each year. Once the training is completed the OPI PIN is activated for use.

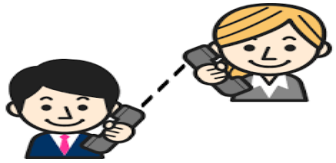
OPI service include all aspects of the SPEC Business Model

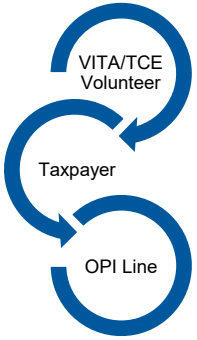
OPI services include all aspects of the SPEC business model. This consists of income tax return preparation, educational outreach, and financial education and asset building (FEAB) information. Examples include:

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

If partners want to use the OPI services for something other than return preparation, prior written authorization is required. To obtain approval, the request must be sent to the Relationship Manger and Area OPI/POC/SME.

OPI Visual Process





This is a visual of the OPI process. The site will need to have conference call abilities in order 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 in detail how this will work.

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.

OPI Available Languages – Publication 5633

Acateco
Albanian
Amharic
Arabic
Aramaic
Armenian
Armenian, Western
Assyrian
Azerbaijani
Bengali
Bhutanese
Bosnian
Bravanese
Bulgarian
Burmese
Cambodian/Khmer
Cantonese
Cebuano
Cha-Chao
Chaldean
Creole
Croatian
Czech
Dari/Farsi
Dzongkha
Farsi - Afghani - Dari
Fijian Hindi
French
French Canadian
Fukienese
Georgian
German
Gheg Albanian
Gorani
Greek
Gujarati
Hakka (Chinese)
Haryanvi
Hausa
Hebrew
Hiligaynon
Hindi
Hmong
Hmong Daw
Hunan
Hungarian
Ilongo
Indonesian
Iranian Farsi / Persian
Japanese
Karen Segaw
Khmer/Cambodian
Kikuyu
Kinyarwanda
Kirundi
Kisi Southern
Korean
Krio
Kurdish
Lao
Lebanese Arabic
Lingala
Lusoga
Macedonian
Malayalam
Mandarin
Marathi
Maymay
Mien
Mixtec
Moldovan
Mongolian
Montenegrin
Nepali
North African Arabic
Pashto
Polish
Portuguese
Punjabi
Q`anjob`al
Quechua
Quichua, Canar Highland
Quichua, Chimborazo Highland
Quichua, Salasaca Highland
Romanian
Russian
Rwanda
Serbian
Serbo-Croatian
Shanghai
Sinhalese
Somali
Sorani
Spanish
Sri Lankan Tamil
Swahili
Szechuan
Tagalog
Taiwanese
Tamil
Telugu
Thai
Tigrinya
Tosk Albanian
Turkish
Twi
Uighur
Ukrainian
Urdu
Uzbek
Vietnamese
Visayan
Wolof
Yiddish
Yombe

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 serves to facilitate 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

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

Time Zone
Select time zone where the call was made.

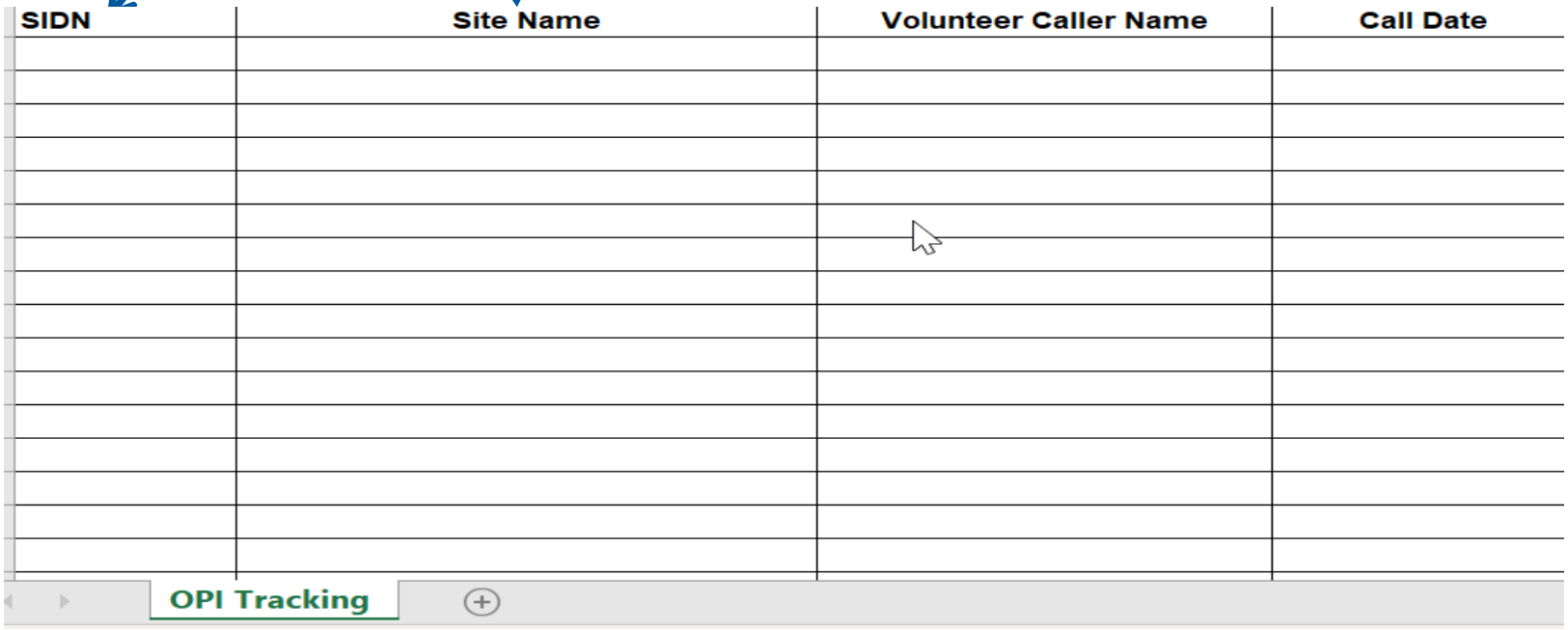
OPI Tracking

Enter SIDN no "S" needed

Enter Name of Site

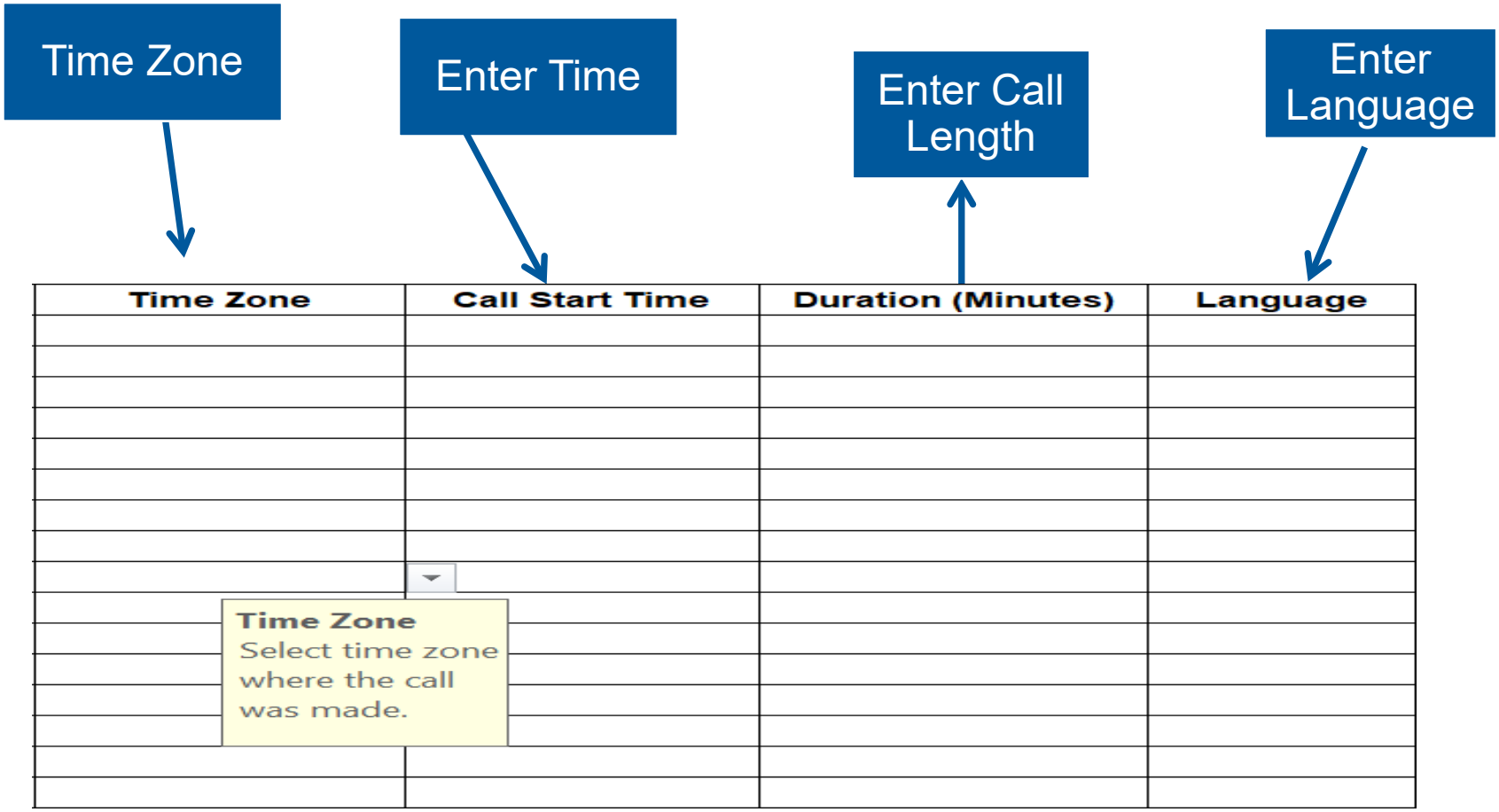
Print Volunteer Name

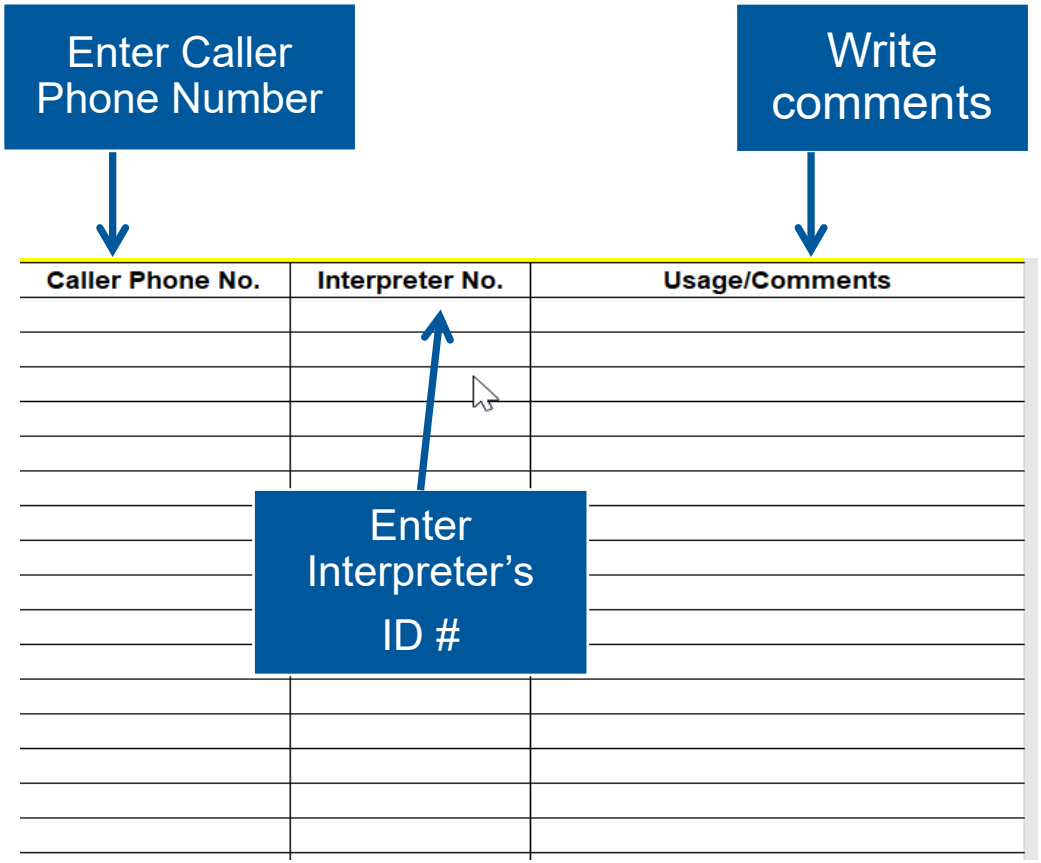
Enter Date



SIDN	Site Name	Volunteer Caller Name	Call Date

OPI Tracking


Time Zone
Enter Time
Enter Call Length
Enter Language
Time Zone
Call Start Time
Duration (Minutes)
Language
Time Zone
Select time zone where the call was made.



Comment Examples:

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

Report OPI Usage

Partners will submit their OPI weekly usage log beginning the week of January 16, 2024, to their local relationship manager.

Weekly Input			
January	February	March	April
14 - 20	28 (Jan) - 3	25 (Feb) – 2	31 (Mar) – 6
21 - 26	4 - 10	3 – 9	7 - 13
	11 – 17	10 – 16	14 - 20
	18 - 24	17 - 23	
		24 – 30	

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

Over-the-Phone Interpreter (OPI) Services Reminders!

- ✓ All employees/partners (new or existing) must attend OPI training each year.
- ✓ 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.

Over-the-Phone Interpreter (OPI) Services Reminders!

- ✓ For returning partners/sites. After completing OPI training your OPI PIN will automatically reactivate within 10 days. Site coordinators with multiple sites can activate all needed OPI PINs with their relationship manager.

- ✓ For new partners/sites request a OPI PIN from 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.

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 offerred.

Form **13715** (October 2021)	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.**

7. Languages offered	Virtual Interpreter Services

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

- **Publication 5547 OPI Job Aid**

- Publication 5633 OPI Available Languages

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

- Form 15373 – OPI Poster

- Pocket Guide

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

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

IRS

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."

Arabic العربية
هل تتكلم اللغة العربية؟ سوف نوفر لكم مترجم على الهاتف.
هذه خدمة مجانية

Armenian Հայերեն
[illegible]

Cantonese 廣東話
你說廣東話嗎？我們可以為你提供電話翻譯。這服務是不收費的

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
क्या आप हिन्दी बोलते हैं? हम आप के लिये फोन पर दुभाषिये(इंटरप्रिटर) कि सुविधा प्रदान करेंगे। यह सेवा मुफ्त है।

Creole Kreyò
Eske ou pale Kreyòl? Nou va bay ou yon entèprèt pa telefòn. Pa gen oken chaj pou sèvis sa a.

Italian Italiano
Parlate italiano? Un interprete da noi fornito vi assistera' durante la telefonata. Il servizio e' gratuito.

Japanese 日本語
日本語をお話しですか？電話での通訳をします。無料サービスです。

Khmer ភាសាខ្មែរ
តើអ្នកនិយាយភាសាខ្មែរឬទេ? យើងនឹងផ្តល់អ្នកបកប្រែជូនអ្នកតាមទូរស័ព្ទ។ ពុំមានគិតថ្លៃទេ សម្រាប់សេវាកម្មនេះ។

Korean 한국어
당신은 한국말을 사용하십니까? 저희가 전화상으로 한국말 통역을 도와드릴 통역사를 제공해 드리겠읍니다. 이 서비스는 무료 입니다.

Somali Soomaaliga
Ma ku hadashaa afkā Soomaaliga?
Waxaan kuu haynaa turjumaan telefoonka kugula jiraya.
Kharash ma laha adeegganu.

Mandarin 普通话
你会说普通话吗？我们可以为您提供电话上的翻译员。此服务是免费的。

Polish Polski
Czy mówią Państwo 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 язык
Вы говорите по-русски? Мы предоставим Вам переводчика по телефону.
Эта услуга оказывается бесплатно.

Spanish Español
¿Habla Español? Le proveeremos un interprete por teléfono. Este servicio es gratis.

Tagalog Tagalog
Nagsasalita ka ba ng Tagalog? Magbibigay kami ng tagapag-salin sa pamamagitan ng telepono. Walang bayad ang serbisyong ito.

Thai ภาษาไทย
คุณพูดภาษาไทยหรือไม่?
เราจะจัดหาล่ามให้คุณผ่านทางโทรศัพท์
บริการนี้ไม่เสียค่าใช้จ่าย

Vietnamese TIENG VIET
Quy vi noi tieng Viet phai khong? Chung toi se cung cap mot nguoi Thong Dich Vien bang dien thoai. Dich vu nay se duoc mien phi cho Quy Vi.

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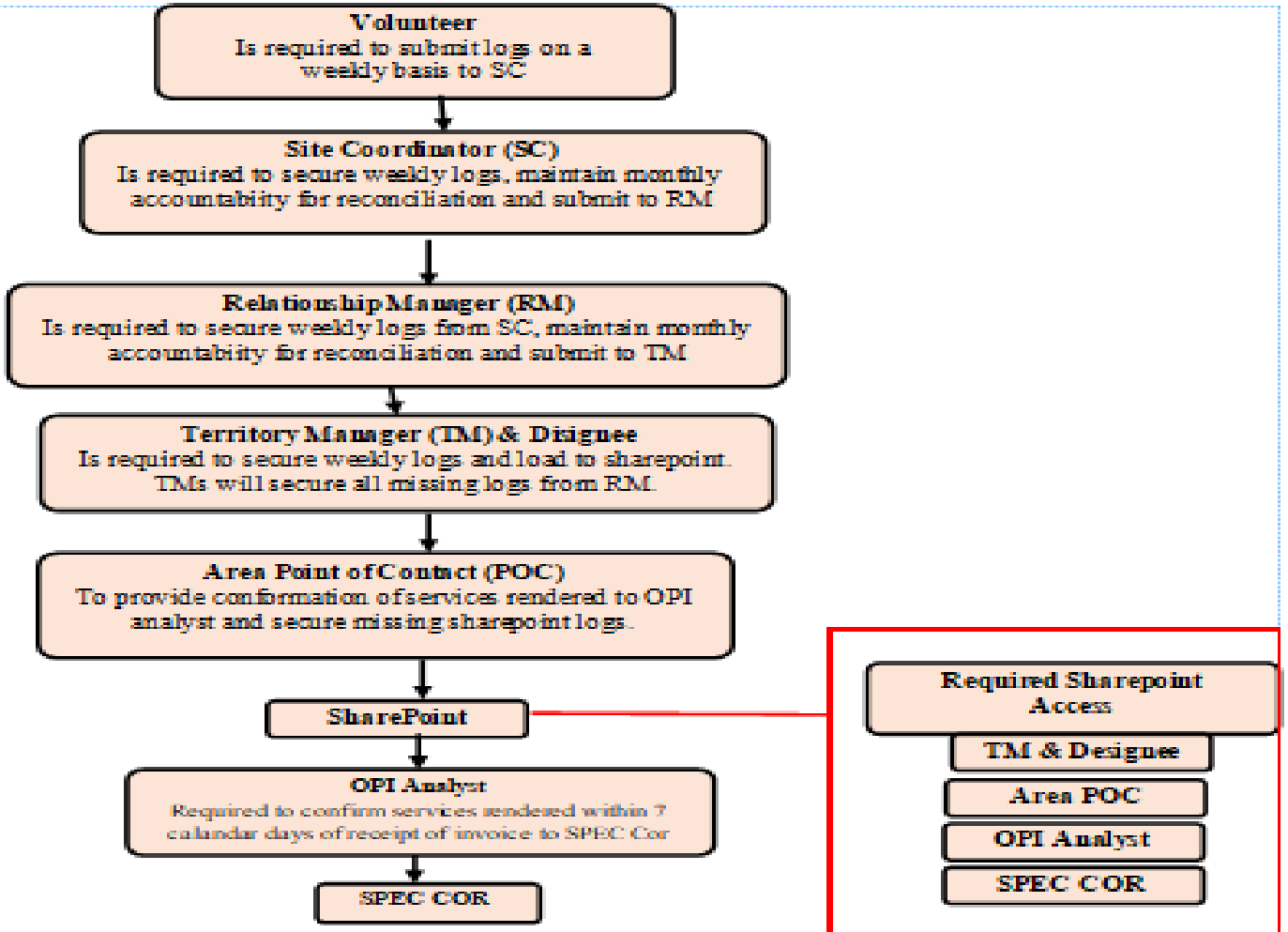
Roles for Log Retrieval



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Additional References

- 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)
- LionBridge Pocket Guide
- SPEC OPI Weekly Log
- Link and Learn Taxes

Thank You

...for attending today!