



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

STAKEHOLDER PARTNERSHIPS, EDUCATION & COMMUNICATION



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



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).



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SPEC OPI Services (cont.)

Examples of Tax Preparation Situations:

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





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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.



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





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 #."





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



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.



Begin the session:

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





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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.

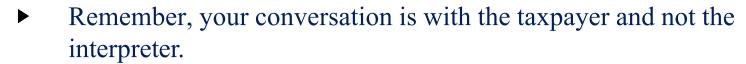




Tips For Working With Taxpayers

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

- Eliminate any background noise.
- Speak slowly and have patience with the taxpayer.



- ▶ If in person, maintain eye contact with the taxpayer.
- ► If in person, observe the taxpayer's body language.
- Keep the taxpayer engaged.







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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

<u>Volunteer</u> – required to submit logs on a weekly basis to SC.

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

<u>Partner</u> – will verify the SC is securing weekly logs and maintaining monthly reconciliation.

<u>Relationship Manager (RM)</u> – 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.

<u>Territory Manager (TM)/ Territory OPI SME</u> – 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.



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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.

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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 manger 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).







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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 🔻	Volinteer Caller Name ▼	Call D 🔻	Time Zone 🔻	all Start t 🔻	Duration (M	linutes) 🔻	Language	Caller Phone 🔻





Stakeholder Partnership Education & Communication

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.



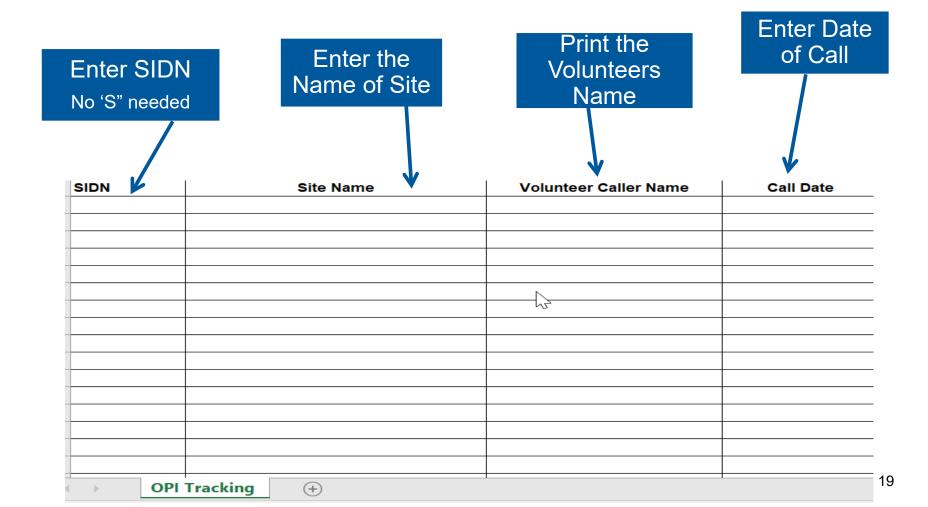


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SPEC OPI Weekly Log

1			Weekly SPEC	OPI Usa	ge 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
3			ì						i I		
4									1		
5									-{}-		
6									7.7		
7									I		
8									l		
9									I		
10											
11						▼					
12									l I		
13					Time Z	Zone					
14					Salact	time zone					
15											
16					where	the call					
17					was m	ade			I		
18					Was III	ddc.					
19											
20									l I		
21											
22									İ		
23											
24											
25											
26											
27											
28											
29											
	← →	OPI Tracking (+)						: 4			

SPEC OPI Weekly Log (cont.)

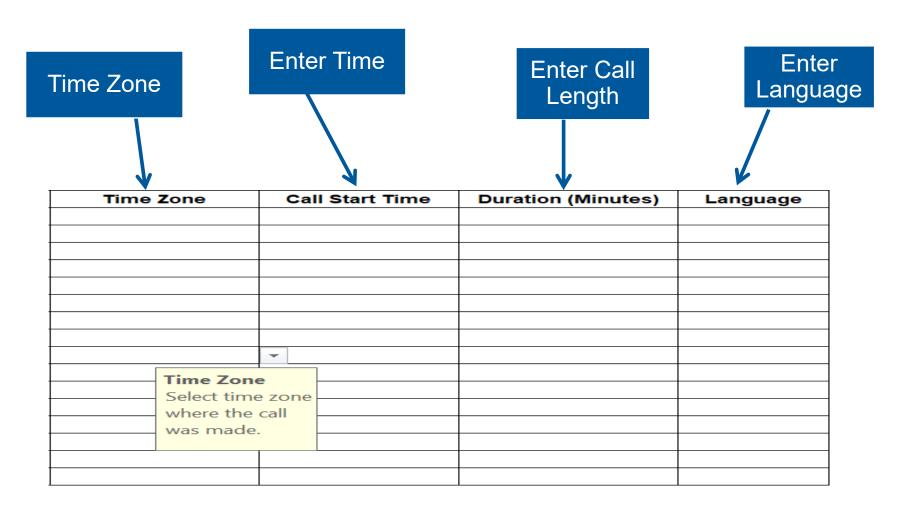






IRS STAKEHOLDER PARTNERSHIP EDUCATION & COMMUNICATION

SPEC OPI Weekly Log (cont.)

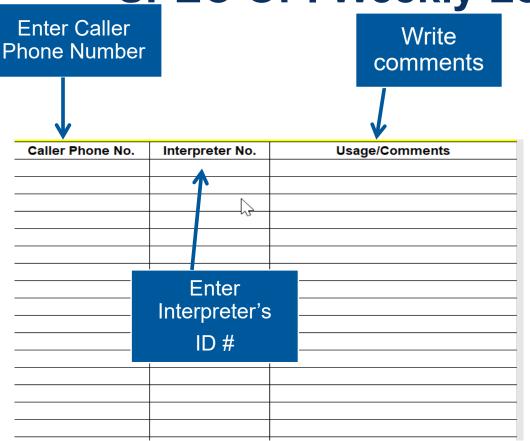






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SPEC OPI Weekly Log (cont.)



Comment Examples:

- 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 turnaround time of three to five days.



SPEC OPI Process: Reconciliation

1	BOD	Site ID		Site	State		Call D/T	Duration (Minutes)	Language	Total Cost	Seconds to connect	_
2	IRS SPEC	IRS SPEC A1 T3	IRS SPE	EC Area 1, Territory 3	GA	3/20	6/2024 2:30:00 PM	138	Russian	\$103.50	5	
3	IRS SPEC	IRS_SPEC_A2_T7	IRS SPE	EC Area 2, Territory 7	GA	4/1/	/2024 10:05:42 AM	31	Iranian Farsi / Persian	\$23.25	10	
4	IRS SPEC	IRS_SPEC_A2_T6	IRS SPE	C Area 2, Territory 6	GA	4/1/	/2024 12:21:26 PM	4	Creole	\$3.00	3	
5	IRS SPEC	IRS_SPEC_A1_T2	IRS SPE	EC Area 1, Territory 2	GA	4/1	1/2024 1:17:34 PM	22	Spanish	\$13.86	2	
6	IRS SPEC	IRS_SPEC_A1_T4	IRS SPE	EC Area 1, Territory 4	GA	4/1	1/2024 1:26:02 PM	9	Spanish	\$5.67	2	
7	IRS SP	IDC CDEC AD TO	IDC CDE	CAraa 2 Tarritary 2	CA	1/1	1/2024 2.02.42 DNA	ΕO	Cnaniah	¢ac E4	17	
	IRS SP IRS SP				W	/e	<mark>≥kly SPEC</mark>	OPI .	og			
10	IRS SP	SIDN Site Nar	ne ▼ V	Volunteer Caller Name	Sta	to v	Call D/T ▼	D	ons (Minutes)	Landuado	▼ Caller Pho	NI -
				Votanteer Catter Hann	Ota		Call D/1	Dura	ons (minutes)	Language	Catter Pilo	ne No.
11	IRS SP SXX	XXXXXX Hillcest C		Alma Dalton	G		4/1/2024 12:21pm	Dura	4	Creole	770-99	
	IRS SP SXX	XXXXXX Hillcest C	UC			Ą		Dura	4 25			7-XXXX
12	IRS SP SXX	XXXXXX Hillcest C	UC N	Alma Dalton	G	A A	4/1/2024 12:21pm	Dura 1	4	Creole	770-99	7-XXXX
12 13	IRS SP SXX	XXXXXXX Hillcest C	UC N IRS SPE	Alma Dalton Sam Cooke	G/	A A 4/1	4/1/2024 12:21pm 4/1/2024 2:00pm	1 57	4 25	Creole Spanish	770-99 678-36	7-XXXX
12 13 14	IRS SPEC	XXXXXXX Hillcest C XXXXXXX Sam NU IRS_SPEC_A1_T3	N IRS SPE IRS SPE	Alma Dalton Sam Cooke EC Area 1, Territory 3	GA GA	A 4/1 4/1	4/1/2024 12:21pm 4/1/2024 2:00pm 1/2024 4:31:21 PM	1	4 25 Spanish	Creole Spanish \$0.63	770-99 678-36 6	7-XXXX
12 13 14 15	IRS SPEC IRS SPEC	XXXXXX Hillcest C XXXXXXX Sam NU IRS_SPEC_A1_T3 IRS_SPEC_A1_T3	IRS SPE IRS SPE IRS SPE	Alma Dalton Sam Cooke EC Area 1, Territory 3 EC Area 1, Territory 3	GA GA	4/1 4/1 4/1	4/1/2024 12:21pm 4/1/2024 2:00pm 1/2024 4:31:21 PM 1/2024 4:33:03 PM	1 57	4 25 Spanish Spanish	Creole Spanish \$0.63 \$35.91	770-99 678-36 6 14	7-XXXX
12 13 14 15 16	IRS SPEC IRS SPEC IRS SPEC	XXXXXXX Hillcest C XXXXXXX Sam NU IRS_SPEC_A1_T3 IRS_SPEC_A1_T3 IRS_SPEC_A2_T6	IRS SPE IRS SPE IRS SPE IRS SPE	Alma Dalton Sam Cooke EC Area 1, Territory 3 EC Area 1, Territory 3 EC Area 2, Territory 6	GA GA GA	4/1 4/1 4/1 4/1	4/1/2024 12:21pm 4/1/2024 2:00pm 1/2024 4:31:21 PM 1/2024 4:33:03 PM 1/2024 5:15:40 PM	1 57 55	4 25 Spanish Spanish Creole	Creole Spanish \$0.63 \$35.91 \$41.25	770-99 678-36 6 14 8	7-XXXX
12 13 14 15 16 17	IRS SPECIRS SP	XXXXXXX Hillcest C XXXXXXX Sam NU IRS_SPEC_A1_T3 IRS_SPEC_A1_T3 IRS_SPEC_A2_T6 IRS_SPEC_A2_T3	IRS SPE IRS SPE IRS SPE IRS SPE IRS SPE IRS SPE	Alma Dalton Sam Cooke EC Area 1, Territory 3 EC Area 1, Territory 3 EC Area 2, Territory 6 EC Area 2, Territory 3	GA GA GA GA	4/1 4/1 4/1 4/1 4/1	4/1/2024 12:21pm 4/1/2024 2:00pm 1/2024 4:31:21 PM 1/2024 4:33:03 PM 1/2024 5:15:40 PM 1/2024 5:26:48 PM	1 57 55 6	4 25 Spanish Spanish Creole Spanish	Creole Spanish \$0.63 \$35.91 \$41.25 \$3.78	770-99 678-36 6 14 8 15	7-XXXX

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





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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 OMB Number Volunteer Site Information Sheet 1545-2222						
taxpayers locate the ne Return the completed	earest volunteer tax preparation s	Site Locator Tool on irs.gov use the information you provite. Fill-in the information below carefully and ensure it is a the site information changes after submitting this formediately.	ocurate and complete.				
		Site Information					
	7. Languages	Virtual Interpreter Services					



SPEC OPI Resources

Publication 5547 OPI 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





TAKEHOLDER 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	NPPCT	አማርኛ ተናጋሪ ናት? በስልክ የትርጉም አገልግሎት እናቀርበሎታለን። ለዚህ አገልግሎትም ምንም አይነት ክፍያ እናስከፍልም።
Arabic	العربية	ل تتحدث اللغة العربية؟ سوف توفر لك مترجمًا فوريًا عبر الهاتف. لا توجد رسوم مقابل هذه الخدمة.
Armenian	Հայերեն	Դուք հայերեն խոսուհմ եք։ Մենք ձեզ հեռախոսով թարգմանիչ կտրամադրենք։ Այս ծառայությունը անվճար է:
Bengali	वाश्ला	আপনি কি বাংলা এ কৰা বলেন? আময়া কোনে আপনায় জন্য একজন নোভাষী প্ৰদান কয়ব। এই নেবাটি বিনামূল্য।
Burmese	Uj w	သင်မြန်မာစကားပြောတတ်ပါသလား၊ မွန်းပြောရာတွင် သင့်အတွက် စကာပြန်တစ်ယောက် ကျွန်ုပ်တို့မှ ထားရှိပေးပါမည် ဤလူဆောင်မှုအတွက် ငွေကုန်ကျမှုမရှိပါ။
Cantonese	廣東語	您投資單級嗎?我們可以為您提供電腦觀算。這服務是不收費的。
Creole	Kreyòl	Eske ou pale Kreyči? Nou ap ba ou yon emtéprét pa telefon. Sévis sa a gratis.
Darl/Farsi	دری	ا شما دری صحبت می کنید؟ ما یک مترجم تلفنی به شما اراقه خواهیم کرد. این سرویس رایگان است.
French	Français	Parlez-vous français? Nous pouvors vous offrir les services d'un interprête au téléphons. Ce service est gratuit.
German	Deutsch	Sprechen Sie Deutsch? Wir stellen ihnen telefonisch einen Dolmetscher zur Verfügung. Dieser Service ist kostenios.
Hindi	सिवी:	या आप हिंदी बोलते हैं? हम आपके लिए प्लेन पर एक हुमाणिया प्रदान करेंगे। इस सेख के लिए कोई शुल्क नहीं है।
Iranian/Farsi/ Persian	فارسى	به زبان فارسی صحبت میکنید؟ ما مترجمی شفاهی را از طریق تلفن در اختیار شما قرار میدهیم این خدمات رایگان است.
Italian	Italiano	Parla Italiano? Un interprete da noi fornito la assisterà durante la telefonata. Il servizio è gratuito.
Japanese	日本語	日本語での対応が可能です。お電話での過訳サービスを無料でご利用いただけます。
Khmer	ភាសាខ្មែរ	តើអ្នកនិយាយរាសាខ្មែរឬនេ? លើ២នឹងផ្តល់អ្នករកស្រែជូនអ្នកតាមចូលេខ្ល។ ខុំមានគិតផ្ទៃទេ សម្រាប់សេវាកម្មនេះ។
Kinyarwanda	lkinyarwanda	Ese uvuga likinyarwanda? Tuzagushakira umusemuzi kuri telefone. Nta mafaranga uzacibwa kuri iyi serivisi.
Korean	한국어	귀하는 현국이 사용자입니까? 저희가 전화상으로 한국어 통역을 도와드릴 통역사를 제공에 드리겠습니다. 이 서비스는 우료입니다.
Mandarin	福港 は	您会就普遍话吗?我们可以为您提供每话口译员。这一服务局免费的。
Nepali	नेपाली	के उपई नेपत्री बोल्यु:कर अमी उपईको लागे कोपना दोधाने उपलब्ध गराउने झाँ। यो संवादो लागि कुनै शुक्त लायैन।
Pashto	يشتو	په پښتو خبري کوي؟ موږ په تاسو ته په تليغون کې يو ژباړونکی درکړو. د دي خدمت لپاره هيڅ فيس نشته.
Polish	Polski	Czy mówią Państwo po polsku? Zapewnimy Państwu tłumacza przez telefon. Ta usługa jest bezpistna.
Portuguese	Português	Você fala Português? Vemos fornecer um intérprete para você por telefone. Não há custos para este serviço.
Russian	Русский	Вы говорите по-русски? Мы предоставим Вам переводчика по тепефону. Эта услуга оказывается бесплатно.
Somali	Soomaaliga	Somali ma ku hadashaa? Waxaan ku siin doonsa turjumaan teleefanks. Ma jiro wax lacag ah oo adeegan ah.
Spanish	Español	¿Habla español? Le proporcionaremos un intérprete por teléfono. Este servicio es gratuito.
Swahili	Kiswahili	Je, unezungumza Klawahit? Tutatoa misalimeni kupitia simu. Hakuna malipo lowa huduma hit.
Tagalog	Tagalog	Nagsasalita ka ba ng Tagalog? Magbibigay kami ng tagapagsalin sa pamamagitan ng telepono. Walang bayad ang serbisyong ito.
Thai	ภาษาไทย	คุณของทางาไทยใช้ใหม? เราจะใช้ในริการล่านค่านทางโทรศัพท์แก่คุณ บริการนี้ไม่มีค่าบริการ
Tigrinya	ትግራኛ	ቋንቋ ትግርኛ ዲኻ ትዛረብ? ብተለደን ተርሣዊ ከንሀበኩም እና። ነዚ ፕሬልግሎት አዚ ዝሽፈል ክፍርት ዝን።
Vietnamese	Tiếng Việt	Quỹ vị có nói tiếng Việt không? Chúng tôi sẽ cung cấp một thông dịch viên cho quỹ vị qua điện thoại. Dịch vụ này là miễn phi.

Publication 5395 [mul) [Rev. 03-9035] Catalog Number 7:045W Department of the Teatrury Internal Revenue Service velocing pre-

- > 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).

- ➤ 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.

- ➤ 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.



- 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.



- Activation email will be sent to the site coordinator, relationship manger and territory manager with the site SPEC OPI PIN information and the Weekly SPEC OPI Usage Log.
- ➤ <u>Multiple sites</u>: 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
- ➤ <u>Publication 5633 OPI Available Languages</u>
- ➤ Form 15373 OPI Poster
- ➤ <u>Publication 4269 Welcome! Do You require service in any language other than English?</u>
- ➤ <u>Publication 5285 IRS Interpreter Services (DeskTop)</u>
- > Publication 5889 Ad Astra Pocket Guide
- ➤ SPEC OPI Weekly Log contact your relationship manager
- ➤ <u>Site Coordinator Corner</u>