



**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).



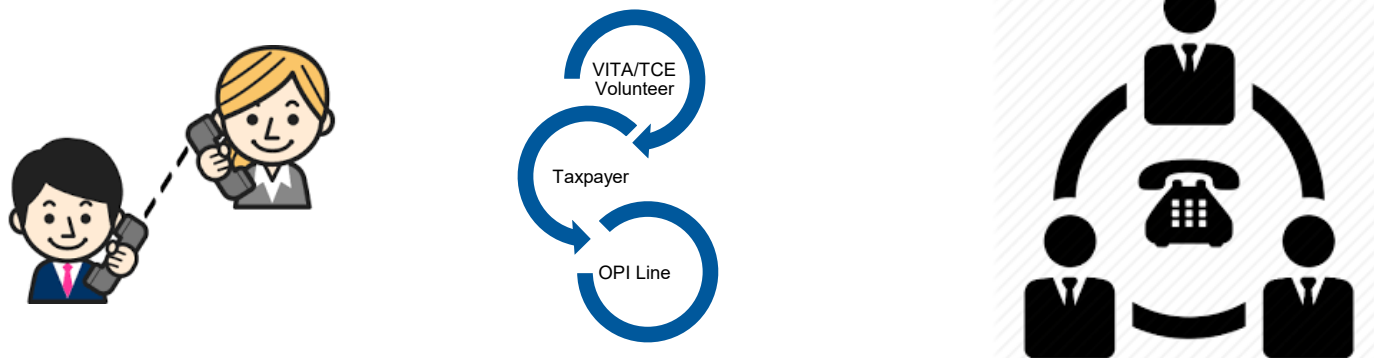
## **SPEC OPI Services (cont.)**

### **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](mailto: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.



# SPEC OPI Weekly Log

[illegible]

[illegible]



## 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 ... |                     |                              |                       |                      |                    |                         |            |                    |
| 18 |                                                               |                     |                              |                       |                      |                    |                         |            |                    |

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](mailto:Grace.Torres@irs.gov)**

### **Area 2:**

**Joe Hayek**

**[Joseph.P.Hayek@irs.gov](mailto:Joseph.P.Hayek@irs.gov)**

### **Area 3:**

**Sandra Cobos**

**[Sandra.D.Cobos@irs.gov](mailto: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 <b>13715</b><br>(October 2022)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Department of the Treasury - Internal Revenue Service<br><b>Volunteer Site Information Sheet</b> | OMB Number<br>1545-2222 |
| <b>Purpose:</b> The IRS toll-free assistance line and the VITA Site Locator Tool on <a href="https://irs.gov">irs.gov</a> 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. <b>If the site information changes after submitting this form, please provide your local IRS contact with the updated information immediately.</b> |                                                                                                  |                         |

## Site Information

7. Languages offered

Virtual Interpreter Services



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# **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](mailto:SPEC.OPI.Service@irs.gov)



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

Publication 5245 (rev. 05-2012) Catalog Number 71046V Department of the Treasury Internal Revenue Service [www.irs.gov](http://www.irs.gov)  
Previously listed as Publication 5245



## **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](mailto: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](#)