

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 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 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 OPI service is free and available to all VITA/TCE partners.

OPI services will now include all aspects of the SPEC business model. This will consist 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 – 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 something other than return preparation, prior written authorization is required from partner/site. To obtain approval, the request must be sent to the RM and Area OPI/POC/SME.

If you are interested in participating in OPI services, 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

- 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, merge the phone lines to form a conference call with the taxpayer, the volunteer and the interpreter.
- **Step 3:** The volunteer will enter the unique personal identification number (PIN) assigned to them after completing OPI training.
- **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 interpreter's name and number (PIN or phone number).
- **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, and 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 each month.

Territory Manager Responsibility

- Territory managers will attend OPI training.
- Territory managers will ensure OPI log completed accurately each week.
- 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 managers ensure OPI logs are reconciled timely each month.

Field Support & Analysis (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.

