

## IRM PROCEDURAL UPDATE

**DATE: 08/02/2024**

**NUMBER: ts-21-0824-0900**

**SUBJECT: Over-the-Phone Interpreter Service Update and Survey Instructions**

**AFFECTED IRM(s)/SUBSECTION(s): 21.1.1**

**CHANGE(s):**

**IRM 21.1.1.5(2)(3)(7)(8) - Updated procedures to provide accurate and complete information for interpreter service.**

(1) Accounts Management has specific applications which are staffed to offer interpreter services for customers who do not speak English or Spanish. These customers will typically contact the service via the Multilingual Product Line, 833-553-9895. Assistors staffing applications 1033, 1123, 1135, 1137, and 286, have received an OPI PIN and training for interpreter service access. **ONLY** assistors who are trained and equipped will use the interpreter service. If you receive a call in a language other than English or Spanish and you are **not** staffing one of the applications that provide OPI service, refer to the Telephone Transfer Guide. Topics containing the headset symbol are available in languages other than English and Spanish. Click the headset and the transfer application number will be provided. Provide the caller with the Multilingual Product Line number 833-553-9895, before transferring the call.

**Exception:** When a taxpayer needs an interpreter and their topic isn't covered in an OPI application, instruct the taxpayer to call back with their own interpreter.

**Note:** If the taxpayer speaks Spanish, refer them to the correct Spanish application. The OPI applications are only for assistance in languages other than English or Spanish.

(2) Assistors staffing OPI applications must verify that the caller is properly routed and requires help in a language other than English or Spanish. After greeting the caller, probe to identify if the caller needs an interpreter.

- a. If the language required is other than English or Spanish, connect to the interpreter service.
- b. If the caller speaks English or Spanish, refer to the Telephone Transfer Guide for a list of topics and transfer numbers to which the customer can be referred.
- c. If you cannot identify the language needed, call the interpreter service and ask the operator for help.

**Exception:** Assistors staffing International product lines and COVID Business Credit calls (App 40) use the OPI service for all Limited English Proficient (LEP) callers, including Spanish.

(3) The IRS/OPI contract allows the disclosure of tax information to the OPI Interpreter. The assistor must limit disclosure to only that information which is necessary to resolve the issue. The interpreters are not employees of the IRS so communicate with them exactly as you would communicate with the taxpayer. To use the OPI services, take the following steps:

- a. To conference a call from the Soft Phone - Press Consult to initiate a consult or conference call.
- b. A pad dialog box will display.
- c. Choose the interpreter's toll-free number listed in the contacts or enter 888-563-1155.
- d. Click consult (the caller will be placed on hold and you will be connected to the number dialed).
- e. When prompted, enter your PIN (xxxx-xxxx) this is a unique personal PIN for each employee. PINs have been distributed to site management. If an employee does not have a PIN, management or local SA must contact the OPI coordinator to have one assigned, usually within 1 business day.
- f. Select language.

Press...	For Language...
1	Spanish (For International Only)
2	Creole
3	Mandarin
4	Korean
5	Vietnamese
6	Somali
7	Russian
8	French
9	Arabic
0	Operator help (To address any other language needs or concerns)

**Reminder:** A transfer to OPI is only used by OPI Applications or assistors staffing International lines when the assistor cannot be understood (by all callers) due to Limited English Proficiency, nor can the assistor understand all parties to obtain the required disclosure authentication or answer the taxpayer's/representative's question due to language barriers.

(4) An interpreter will be connected to the call if available. If an interpreter for the requested language is not available on the first attempt, don't wait for an interpreter to become available; advise the taxpayer to call back.

**Note:** If the connection with an interpreter is unsuccessful, be sure to click end on the keypad for the consulted call attempt to end the call to the interpreter service.

(5) Brief the interpreter. Summarize what you wish to accomplish and give any special instructions. Click conference to bring in the taxpayer.

(6) The OPI Interpreter is there to help you in communication with the LEP taxpayer regardless of the individual's preferred language by removing the language barrier between you the caller.

- Interpreters are trained to speak in the "first person." Conduct the conversation as if you are communicating with an English-speaking taxpayer, in the first person.

**Example:** Address the interpreter: "I need you to provide me your tax forms. "Do **NOT** address the interpreter: "I need you to tell the taxpayer to provide their tax forms."

- Speak in short sentences and ask the non-English speaker to do the same. Over-the-phone interpreting is done consecutively, thus the call is most effective with concise sentences.
- Pause at the end of a complete thought to allow for interpretation.
- Avoid compound questions. Asking a single question at a time will help avoid misunderstandings and set a good rhythm.
- If you sense the LEP customer does not understand, rephrase the question in a different manner.
- Avoid using acronyms.

(7) Offer the OPI Customer Satisfaction Survey to all taxpayers who receive OPI service in one the languages listed below: **Exception: Do not offer the OPI survey on international applications.**

- Spanish
- Haitian Creole
- Russian
- Portuguese
- Arabic
- Vietnamese
- French
- Korean
- Somali
- Mandarin

Follow the instructions and script in IRM 21.1.1.5.1, OPI Customer Satisfaction Survey Process, to offer the survey.

(8) When not transferring an LEP taxpayer, ensure the taxpayer and interpreter disconnect at the end of the call. When the caller disconnects, you will automatically move to "available" status and capture the next call. If the system does not place you in available status and the line is still open, make the following statement: "The call is complete and you may hang up now." After the statement, press the Release key.

(9) All IRS employees who use the OPI service can provide feedback about the service by completing Form 14162, *OPI Service Feedback*, and submitting it by e-mail to the address on the form.

(10) **OPI Assistors Staffing NON-OPI Applications** - If you have an OPI PIN but are staffing a non-OPI application, and the caller needs an interpreter for a language other than English or Spanish, transfer the caller to the correct OPI application according to the Telephone Transfer Guide.

(11) **Assistors Who Do Not Staff OPI Applications** - Not all assistors are assigned to staff OPI applications and will use OPI services. Assistors who are not staffing an OPI application provide help in English and Spanish only. If an LEP taxpayer calls with their own interpreter and completes disclosure authentication, don't transfer them to an OPI application unless requested by the caller. See IRM 21.1.3.4, Other Third Party Inquiries. Transfer requests for languages other than English or Spanish following the Telephone Transfer Guide, which includes a list of topics and transfer numbers, identified by the headset icon, to which the taxpayer can be referred. If the taxpayer speaks Spanish, refer the caller to the proper Spanish application per the TTG.

**IRM 21.1.1.5.1 - Added new section for interpreter service survey. Over-the-Phone Customer Satisfaction Survey Process has been added to gather information on the taxpayer's over the phone interpreter experience.**

#### OPI Customer Satisfaction Survey Process

(1) Offer the survey if the OPI service is provided in one of the 10 languages in IRM 21.1.1.5(7). This survey will take precedence over all other surveys, such as the Accounts Management Customer Satisfaction Survey.

**Note: Do not offer the survey** if the call is in a language outside of these 10 languages.

**Note:** Visually impaired employees using JAWS equipment are not required to participate in this feedback process.

(2) To offer the survey, complete the call as usual. After the call is complete, read the following script **exactly as written**: "**This call has been selected for an anonymous survey about your experience while using the language interpreter service. It will take approximately 10 minutes. Would you be willing to participate in the survey?.**"

(3) If the caller agrees to take the survey, take the following steps to transfer the call as appropriate for the telephone system:

- Thank the caller and ask them to please wait until the call is transferred.
- Ensure the interpreter disconnects from the call first.
- Do not place the caller on hold.

- Transfer the call to extension 413505.
- Do not wait for the extension to pick up for further instructions.

(4) If the caller declines to participate, thank them and terminate the call. However, if the caller asks questions about the survey, read the following as written:

<b>If the caller</b>	<b>Then respond</b>
Would like to know how long the survey takes to complete	"The survey takes approximately 10 minutes to complete."
Expresses concern about how they are selected	"You were selected based on the language used for this interpreter service."
Expresses concern about anonymity	"All information is anonymous. The responses on the questionnaire are not linked to any single individual."
Would like to complete the survey at a later time	"Unfortunately, this is the only opportunity we will have to survey you regarding this call."
Ask how the information is used	"The IRS is trying to improve its language interpreter service. The first step in this process is to gather reliable information from those who directly use the service."
Express concern for reprisal	"You will not be identified or penalized whether or not you decide to participate."