



Volunteers

Steps for volunteering at a free tax clinic



Through the Community Volunteer Income Tax Program (CVITP), you can join thousands of volunteers across Canada who help people in need do their taxes. Free tax clinics can make a big difference in the lives of those with modest incomes by helping them access their benefits and tax credits. This is money they rely on to make rent, pay for child care, or buy food for their families.

You can volunteer in person or virtually. For virtual clinics, it helps if you have some CVITP experience, are comfortable working on your own, and are approved to use “Auto-fill my return,” which is an online service of the Canada Revenue Agency (CRA).

This checklist provides an overview of the steps for volunteering at a free tax clinic. You will find full instructions in the training and support materials that the CRA gives to CVITP volunteers and host organizations.

Checklist

Register as a volunteer

1. Go to canada.ca/taxes-volunteer to register as a volunteer. Registration is open year-round; however, we recommend that you register between the end of October and the start of February.
2. Choose a volunteer role: you can provide support, be a tax preparer, or do both.
3. Identify the volunteer requirements for your role:
 - For a support role, the requirements depend on whether you will handle or have access to taxpayer information.
 - For a tax preparer role, the requirements depend on how you will prepare and file returns (electronically, paper, or both).

Complete the volunteer requirements

4. Affiliate with a CVITP community organization (this is required for volunteering). CVITP officers can help match you with an organization; however, it is your responsibility to ensure you are affiliated. The number of organizations in need of volunteers is limited in some regions.
5. Depending on your role, you may need to:
 - get a RepID on the CRA’s Represent a Client portal
 - apply for a CVITP EFILE account or renew your account
 - provide a valid police records check (obtained within the last three years)
6. If you volunteer at a virtual clinic, you may also need an email address and access to:
 - the Internet

- video conferencing software (you may have to download an app)
- a phone

Take training

- 7. Take free training offered by the CRA. Online training, webinars, and optional in-person sessions are available, and participation is strongly recommended.

Install software

- 8. If you are going to be a tax preparer, install the current version of the UFile CVITP tax software. To use the software, you will need to enter a software activation key, which the CRA makes available to organizations starting in late January.

Volunteer at a clinic

- 9. Ask taxpayer for identification.
- 10. Get authorization to do their taxes.
- 11. Keep information secure and confidential.
- 12. Use the CRA's electronic services, including EFILE for electronic filers, and Auto-fill my return.
- 13. Enter the CVITP organization identification number (COIN) on each return that is filed using the UFile CVITP tax software.
- 14. Call the CVITP dedicated help line to ask questions about income tax, using EFILE, and the UFile CVITP tax software.