

# CVITP Virtual Clinics

## QUESTIONS AND ANSWERS FOR ORGANIZATIONS

The Canada Revenue Agency (CRA) will continue to support organizations who choose to host virtual CVITP tax clinics for this coming filing season.

### Reminders:

- Please ensure that your volunteers protect their privacy by using a separate email account and blocking their number from being displayed when communicating by phone with taxpayers.
- This document is for the exclusive use of CVITP organizations participating in virtual clinics. Please do not share this document with anyone outside the CVITP.
- Your organization can choose to offer virtual clinics to serve individuals across your province, or virtual Northern communities clinics which provide assistance to individuals living in northern communities (prescribed zones) within Canada.
- Changes have been made to the EFILE registration/renewal forms to improve the systems' safety and security. As a result of these changes, **all EFILE registrations or renewals now require a RepID.**
  - If your volunteers already have a RepID, they must provide it when they register/renew their account.
  - If they do not have a RepID, they can obtain one by registering with [Represent a Client](#). Volunteers are encouraged to obtain a valid RepID at [Represent a Client](#) (RAC) and to include it on your registration form. However, if you are unable to obtain a RepID, you can enter the temporary code **TEMPO01** instead. Please note that this temporary code is **not a valid RepID**.
- If any of your volunteers are using Windows 11, (or in some cases, prior versions of Windows) and are experiencing issues using Auto-fill My Return for a tax year prior to 2021, they must download the latest UFile CVITP update from <https://www.ufile.ca/products/cvitp>.
- UFile CVITP software CDs have been replaced with USB flash drives.

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### Q1 What is a virtual clinic?

**A1** A virtual clinic is any clinic where tax returns are completed free for eligible individuals across your province/territory, by videoconference or by phone, without any physical contact. Any approved CVITP organization with affiliated and approved volunteers can host virtual clinics.

### Q2 What is a virtual Northern communities clinic?

**A2** A virtual Northern communities clinic is a clinic that serves eligible individuals living in northern communities (prescribed zones) within Canada. These individuals can be served by volunteers

from **across** Canada. The volunteer and the taxpayer do **not** need to be located in the same province/territory.

**Q3 What are the types of virtual clinics that I can host?**

**A3** You can choose to host a virtual clinic and/or a virtual Northern communities clinic using the following methods:

1. Video conferencing;
2. Telephone;
3. Modified drop-off clinic.

The type of clinic your organization will host will be determined by your preference and by the methods of communication accessible to your volunteers and the individuals they serve. Your organization can decide to use all, some or none of these options.

**Q4 Who can volunteer at a virtual clinic?**

**A4** The virtual clinic option is best suited for volunteers with some experience with the CVITP who are comfortable working independently. Ideally, volunteers should also be approved to use Auto-fill my return (AFR), but that is not mandatory.

**Q5 Can I recruit volunteers outside my community?**

**A5** Yes, you can recruit volunteers outside your community but within your province or territory.

**Q6 Can my organization complete returns for individuals outside my community?**

**A6** Yes, you can offer your services to any eligible individuals outside your community but within your province/territory, unless you are hosting a virtual Northern communities clinic (see Q2).

**Q7 Do organizations have to follow these guidelines exactly as they are written when running a clinic?**

**A7** No, organizations can adjust the guidelines to fit their particular situation, however, they must ensure the following in setting up a clinic:

- virtual clinic records are maintained by organizations (see Q8)
- use the job aid for virtual clinic registration form (see Q13)
- taxpayer information is protected

**Q8 Do volunteers have to follow the guidelines for virtual clinics exactly as they are written when completing tax returns?**

**A8** No, volunteers do not need to follow the guidelines step by step but they do need to follow the instructions for each section, if applicable. The sections in the virtual clinic(s) guidelines are:

- Obtain consent
- Confirm identity
- Complete the return
- Obtain consent to file electronically (TIS60)
- File the return

**Q9 How will volunteers authenticate an individual's identity given that the individual will not be physically present?**

**A9** There have been changes to the authentication process and the way an individual's identity can be confirmed. There are four ways an individual can be authenticated.

1. Your organization or the volunteer knows the individual and can confirm their identity.
2. The volunteer can confirm the individual with information provided by AFR, after consent has been obtained to use this service.
3. The volunteer can confirm identification visually on video conferencing.

If none of these three options work, a fourth is available:

4. The volunteer can send an email request to have an individual's identity confirmed over the telephone by a CRA employee. For more information, see the [CRA Authentication Process – Questions and Answers](#).

**Q10 Will my roles and responsibilities change when hosting a virtual clinic?**

**A10** Regardless of the type of clinic you host, the roles and responsibilities remain the same; however, we suggest you consider the following:

**Video conferencing or telephone:**

- obtain contact information for the individual to provide to the volunteer.
- establish a way in which to connect volunteers with individuals that is acceptable to both parties. For example, provide the volunteer with the individual's contact information and have them reach out to the individual at a predetermined time.

**Modified drop-off clinic:**

- If the individual's identity can be confirmed at the time of drop-off, please remember to relay this information to the volunteer so they don't duplicate this step.
- Develop an intake process. Ensure the volunteer is provided with the individual's contact information as well as information required to complete their return (date of birth, current address, marital status, spousal/child information, DTC eligibility, rent, etc.).
- Establish a process for volunteers to access the dropped off materials.

**Q11 Will there be additional administration work required to host a virtual clinic?**

**A11** Yes, your organization will be required to maintain a record of all virtual appointments.

**Q12 Will the volunteer's personal information (i.e. phone number or email address) be shared with individuals?**

**A12** Volunteers are encouraged to create an email account specific for their CVITP activities and use a block function to mask their phone number if they will be contacting an individual.

**Q13 Can a volunteer send password protected information to an individual via email?**

**A13** Yes, effective February 2021, CVITP UFile software has the functionality to password protect PDF documents sent via email to individuals. This feature is available for the year 2021 and

subsequent years. Please refer to appendix G in the guidelines for volunteers for more information on PDF Password Protection .

**Q14 How do I register my virtual clinic?**

**A14** You must select the option “virtual” and/or “virtual Northern communities clinic” on the Clinic details section of the [web application form](#) / [web application form \(QC\)](#).

**Q15 How do I promote my virtual clinic?**

**A15** You can promote your virtual clinic as you would normally do with other clinics. You can simply advertise your virtual clinic through social media (i.e. Facebook and Instagram), or simply by agreeing to post your clinic on the CRA website (Canada.ca).

**Q16 Will support be available for my organization? If so, during what hours?**

**A16** Yes, support will be available during normal business hours of operation. Support is available from the EFILE Helpdesk, the CVITP dedicated phone line and CVITP coordinators.

**EFILE Helpdesk** - [EFILE Helpdesk support - Canada.ca](#)

**CVITP Dedicated phone line** - The hours of operation are listed below for your reference.

CVITP Dedicated Helpline for volunteers 1-866-398-3488 <b>*year-round hours*</b>
Monday – Friday: 8:00 a.m. – 11:00 p.m. (EST) Saturday: 9:00 a.m. – 8:00 p.m. (EST) Sunday: Closed