



Organizations

Steps for hosting a free tax clinic



Through the Community Volunteer Income Tax Program (CVITP), your organization can join thousands of organizations across Canada that 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. As a participating organization, you can choose to host clinics in person, virtually, or both.

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

Checklist

Register to host

- ☐ 1. Go to canada.ca/taxes-volunteer to register your organization.

After you register:

- a CVITP officer will provide details on your responsibilities and offer guidance and resources including free tax software, training, and a dedicated help line for CVITP volunteers
- you will receive your registration approval email with your CVITP organization identification number (COIN)

Plan your clinic

- ☐ 2. Choose a clinic type. Volunteers can prepare taxes by videoconference, by phone, in person, or by using a drop-off and pick-up option.
- ☐ 3. Schedule your clinic dates. Most free tax clinics are in March and April, but you can host clinics at any time of year. UFile CVITP tax software is usually available mid-January, and most tax slips are issued by the end of February.
- ☐ 4. After you select the clinic dates, enter them into the clinic form on the CVITP website. You can choose to make your clinic information available in our directory or keep it private.

Recruit and manage volunteers

- ☐ 5. Recruit volunteers through your organization, networks, or a CVITP officer.
- ☐ 6. Get all volunteers to complete the annual CVITP volunteer registration.
- ☐ 7. Verify all volunteers meet the requirements for their role, which can include:
- a valid police records check

- a valid EFILE number
- a RepID in the CRA's Represent a Client portal

☐ 8. Encourage volunteers to take the free training offered by the CRA.

Manage and request resources

- ☐ 9. Request promotional material from your CRA coordinator.
- ☐ 10. If your organization needs free laptops, request them through the CVITP computer donation program (quantities limited).
- ☐ 11. Upgrade your laptops or computers to Windows 11.
- ☐ 12. Use the CRA's electronic services, including EFILE for electronic filers, and Auto-fill my return.
- ☐ 13. Volunteers who are filing tax returns should install the current version of the UFile CVITP tax software. To use the software, they will need to enter a software activation key, which the CRA makes available starting late January.
- ☐ 14. Track your expenses, the number of returns filed at your clinic, and any other government funding you receive for tax clinics.

Host your clinic

Make sure your volunteers follow these steps:

- ☐ 15. Ask each person they are helping for identification.
- ☐ 16. Get authorization to do their taxes.
- ☐ 17. Keep information secure and confidential.
- ☐ 18. Use the CVITP dedicated help line for questions about income tax, using EFILE, and the UFile CVITP tax software.
- ☐ 19. Enter the COIN on each return that is filed using the UFile CVITP tax software.