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Get ready to volunteer

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Roles and responsibilities

Depending on the community organization you are volunteering with, you may be assigned one or more of the following roles:

- Tax preparer
- Coordinator
- Support Roles:
 - [Greeter](#)
 - [Interpreter](#)

- Screener
- Administrator

Before starting the training, review the roles and responsibilities you will assume as a CVITP volunteer on the CRA's Before you register – important information page.

01 cvitp help people file taxes



 Transcript

Help people file their taxes – What to expect as a volunteer

Please note: This is a YouTube video, and will only play for those with unrestricted Internet access.

Register to volunteer

To participate as a CVITP volunteer for the upcoming tax season, ensure that you have met all of the requirements for your role(s).

- Affiliate yourself with a CVITP organization (your CRA coordinator may be able to help you find one)
- Register to volunteer with the CVITP (annual registration renewal)
- Provide a valid police records check to your organization if you are:
 - accessing individuals' information
 - preparing and submitting paper tax returns
 - using Auto-fill my return (AFR)



CVITP tip

A police records check is valid as long as it has been issued within the last three years. Contact your organization if you have any questions.

Additionally, if your role is volunteer tax preparer, you may also need to:

- obtain a RepID
- register for an EFILE number, to electronically submit tax returns (initial registration or annual renewal)

For more information on the different requirements, refer to Register to volunteer.



Important reminder

If you are a returning volunteer, please ensure you complete the online CVITP registration form, found under Register to volunteer, and the annual renewal of your EFILE account.

Getting access to the tax software

Your organization or CRA coordinator will send you an email containing the link required to download the software and UFile activation key.

A new version of UFile CVITP software is released each year.

If you need to install the UFile CVITP tax software for prior tax years, your organization or CRA coordinator can provide you the required software and activation keys.

Your organization may also provide you with a CVITP Organization Identification Number (COIN). This number is used to count the number of federal tax returns electronically sent by your organization through UFile CVITP.

For more information, refer to EFILE-Netfile setup under Setting up the software.

Safeguarding an individual's information

Follow these steps to ensure you are keeping an individual's information safe:

- Do not use or disclose the individual's information for any purpose other than to complete their tax return
- Store the individual's information securely in a locked drawer or cabinet and never leave their information unattended
- Be mindful of your surroundings when speaking with individuals, especially in a virtual clinic setting when other people are present or there are nearby devices like Google Home or Alexa
- Tell your community organization and your CRA coordinator immediately if a security breach such as lost, stolen or compromised

data occurs

Supplies and logistics

To ensure you can efficiently perform your role, we suggest having the following:

Recommended supplies:

- Desktop or laptop computer
- Internet connection
- Mandatory forms:
 - TIS60 - CVITP Taxpayer Authorization (mandatory)
 - CVITP pre-filled Authorization request – signature page (if using Auto-fill my return)
- UFile activation key
- EFILE number and password

Useful supplies:

- Printer and USB flash drive
- Federal Income Tax and Benefit Guide
- Forms, such as:
 - T1 Adjustment request (T1-ADJ),
 - Direct deposit enrollment (8001-552E),
 - Address change request (RC325)
 - Disability Tax Credit Certificate (T2201)
- Pre-addressed tax centre envelopes
- Pencils, paper, calculator, stapler and other general office supplies

Forms commonly used by CVITP volunteers can be accessed and printed directly from the [Forms, job aids and fact sheets](#) page. For information on how to order forms online or over the phone, refer to [Contacts and links](#).

Logistics:

- Time of arrival (before the start of your shift)
- Duration of appointments (time scheduled for each appointment)



Virtual clinics

If you will be preparing tax returns virtually, be sure you also have:

- a phone
- an email address
- a tablet or other device able to support video calls

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