Sign in

Procedures for tax preparation

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Returning and clearing information

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Provide the individual a copy of their tax return and forms

Although the CRA encourages electronic filing, it also recognizes that you may need to provide specific pages or a copy of the tax return to an individual. In these situations, you can either save them as a password protected PDF and send them via email or print them for the individual. For more information, refer to <u>Saving and printing tax returns</u>.

If you print tax returns or other documents containing the individual's information using a shared printer, ensure that you pick them up promptly. Do not leave them on the printer for others to find.

Return all documentation to the individual

Do not keep any of the individual's documents (paper or electronic). This includes the completed TIS60 as well as any calculations or notes you may have made. Those documents, including the TIS60, should not be sent to the CRA if they have not been picked up by the individual.

> **Reminder**
>
> Inform the individual that they should keep all receipts in case the CRA requests them in the future.

Erase all information

If you work on a computer or use a printer that you share with other volunteers within your organization, be sure you clear all of your user information at the end of your shift.

1. Go to **EFILE-Netfile setup** in **settings**
2. Click **Clear Part A** to remove information in **Part A - Identification Information**
3. Click **Save**

EFILE-NetFile setup

EFILE-NetFile setup

In what capacity are you preparing tax returns?

Volunteer with the CVITP ▼

Electronic filing method

○ NetFile

● EFILE

☐ NetFile Québec for professionals

EFILE is for professionals and CVITP tax preparers only.

Please click Save to confirm any changes.

EFILE registration information

Part A - Identification Information

CRA EFILE number
X2345 *

CRA EFILE password
****** *

EFILE

Part B - Information about your business or organisation

Contact name
[ ]

Business or organisation name
xxx-Organization *

Street
[ ]

City
xxx-City *

Province
Ontario ▼

Postal Code
[ ]

Phone
[ ]

Country
[ ]

Fax
[ ]

Email address
[ ]

Do you have a COIN? *
● Yes ○ No What is a COIN?

COIN *
[ ]

Clear All   Clear Part A   Save   Cancel

▼ Text version of the above image

EFILE-NetFile setup screen
Clear All button is highlighted
Clear Part A button is highlighted

Save button is highlighted

When you click **Clear Part A**, information about the business/organization remains in Part B. If you need to delete all information, including the organization, click **Clear All** and **Save**.

Formatting the USB flash drive to erase the data

💡 | **CVITP tip**

You do not have to save the tax return to EFILE or print it. This step is only necessary if you had to save the tax return.

If it was necessary to save the tax return, be sure to format your USB flash drive no later than 48 hours after the CRA accepts the tax return. Formatting erases all of the data on the USB flash drive.

To format your USB flash drive, follow these steps:

1. Connect the USB flash drive to your computer.
2. Click the Windows icon, search and select **This PC**.
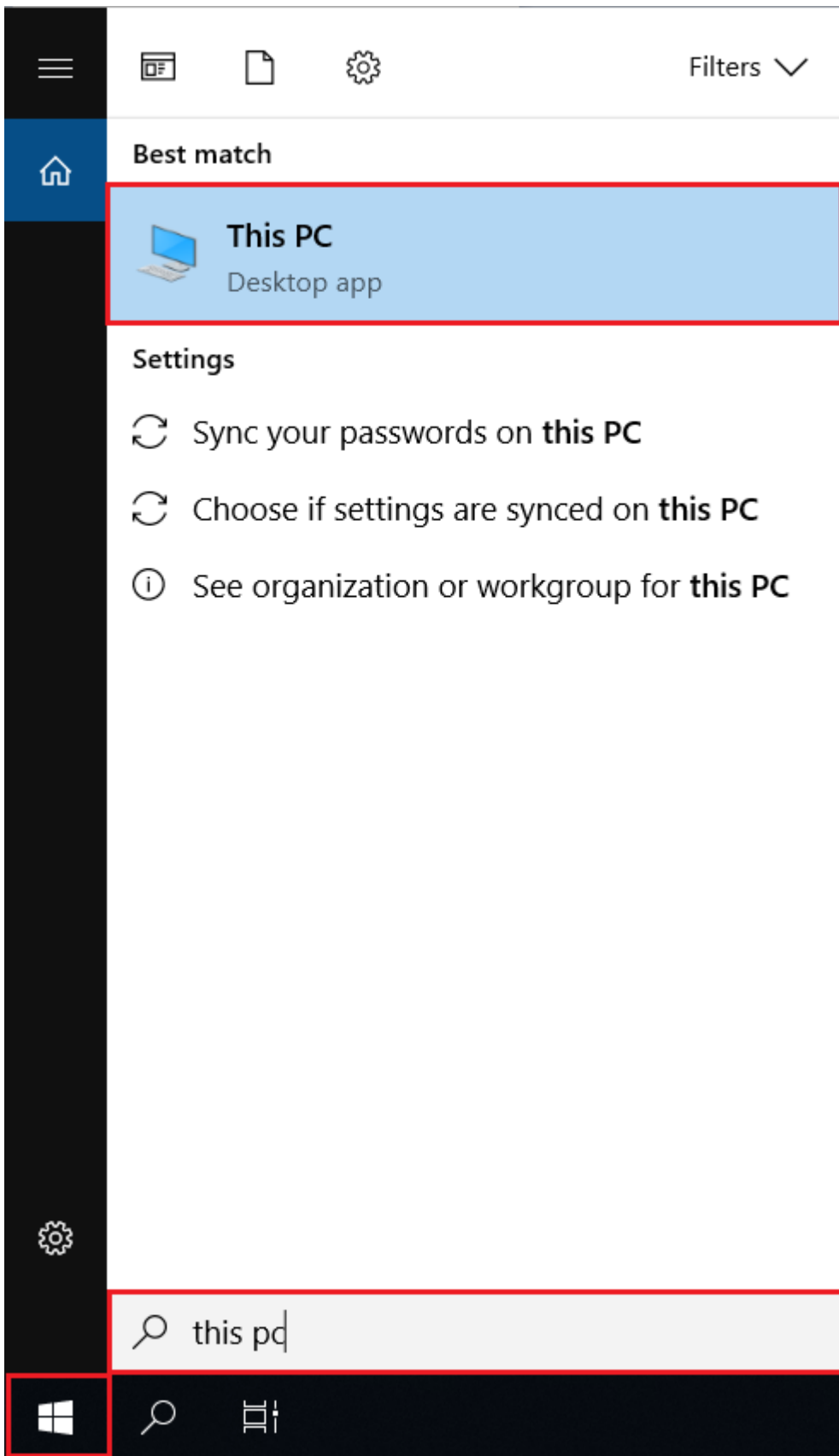
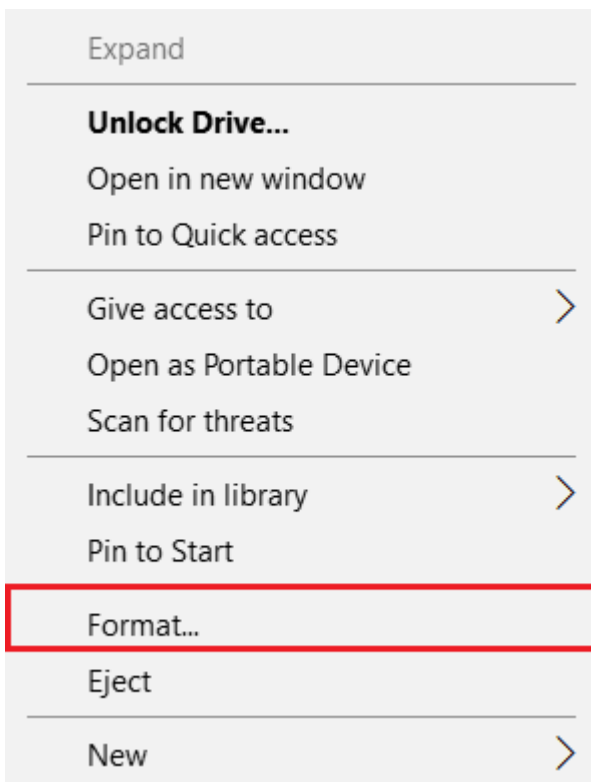## ▼ Text version of the above image

Computer menu

3. In the displayed window, find the name of the USB flash drive that you would like to format under the Devices and drives section.

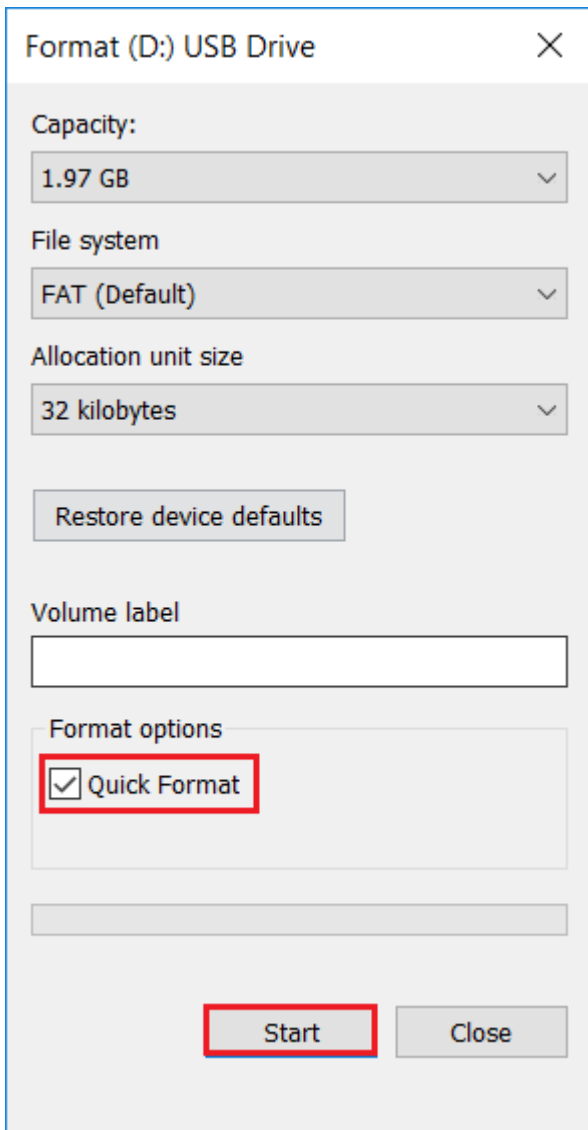4. Right-click on the USB flash drive and click **Format** in the pop-up menu.

▼ Text version of the above image

Computer menu
Unlock Drive option
Format option is highlighted

5. Tick the box next to **Quick Format** and then click **Start** to format the USB flash drive.

Format (D:) USB Drive

Capacity:

1.97 GB

File system

FAT (Default)

Allocation unit size

32 kilobytes

Restore device defaults

Volume label

Format options

☑ Quick Format

Start   Close

▼ Text version of the above image

Format sub-menu

Quick format is ticked and highlighted

Start button is highlighted

6. Click OK to ensure that all data on the USB flash drive has been erased.

What comes next ➡

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