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Reference material for community organizations

This webpage is only for organizations participating in the CVITP.

Please do not share with anyone who is not a participating CVITP organization or volunteer.

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About the Community Volunteer Income Tax Program

The CVITP is a collaboration between participating community organizations and the CRA. Participating organizations host free tax clinics where volunteers complete tax returns for eligible individuals.

In the province of Quebec, the program is known as the Income Tax Assistance – Volunteer Program (ITAVP) and is jointly administered by the CRA and Revenu Québec. Volunteers in Quebec complete both federal and provincial tax returns.

For more information, refer to [Income Tax Assistance – Volunteer Program](#) on Revenu Québec’s website.

Responsibilities of the community organizations

As a participating organization, you are responsible for:

- Recruiting volunteers.
- Planning your free tax clinics.
- Supporting your volunteers.
- Keeping information secure and confidential.
- Ensuring that all volunteers register online.
- Ensuring that the CRA has approved the registration for each volunteer before they begin volunteering.
- Confirming that volunteers have met security requirements based on their volunteer role, including a valid police records check. For the CVITP, police records checks are valid as long as they’ve been issued within the past three years. If you have questions about police records

checks and if your volunteers require them, reach out to your CRA coordinator.

- Informing the CRA when volunteers can no longer participate in the program. For example, a volunteer may be temporarily located outside of Canada, be deceased, or choose not to continue.
- Sharing your CVITP Organization Identification Number (COIN) with volunteers who are affiliated with your organization.

To learn more about your responsibilities in general, refer to tax clinic basics on Canada.ca.

Charging fees for tax clinics

Community organizations and volunteers must not charge for the services they offer through the CVITP. They must decline any offers of payment. In addition, organizations must not charge a membership fee as a way to collect payment for completing tax returns. Organizations and volunteers charging a fee will be removed from the program and their CVITP EFILE account will be suspended.

Role of the CRA

A CRA coordinator is available to guide you. They are your point of contact and can help you access:

- Training for volunteers
- Tax preparation software
- Dedicated help line for volunteers
- Promotional material
- Computer donation program
- CRA electronic services, such as EFILE and Auto-fill my return

Training and reference tools for volunteers

The CVITP learning guide and reference tools are complemented by free live webinars or in-person sessions. Ask your CRA coordinator if in-person training is available in your area.

If volunteers live in a remote area where Internet access is not always available, please contact your CRA coordinator to request alternatives to online training. PDF versions of training material can be provided, and in-person training may be available.

Tax software

The CRA provides free UFile CVITP tax preparation software for volunteers. Each year when the current version is available (usually in late January), approved organizations will receive an email containing activation keys and instructions on [How to set up the software](#).

UFile CVITP software is available on USB flash drives for those without Internet access. If you require a USB flash drive or need software for previous years, contact your CRA coordinator.

For more information on the UFile CVITP software, including frequently asked questions, links to UFile and EFILE guides as well as other online help, please refer to [UFile CVITP](#) or consult the [UFile overview](#) section of the CVITP Learning Guide.

Dedicated help line for volunteers

CVITP dedicated helpline for volunteers: 1-866-398-3488.

Volunteers and organizations may call the CVITP dedicated help line throughout the year with questions about individual income tax, UFile CVITP tax preparation software, EFILE and EFILE error messages.

This number is only for CVITP volunteers and organizations. Please do not share with individuals outside of the CVITP.

Monday to Friday: 8 am to 11 pm Eastern time

Saturday: 9 am to 8 pm Eastern time

Sunday: Closed

Promotional material

Ask your CRA coordinator for promotional material before hosting a free tax clinic.

- Promotional poster (TIS50):
 - advertise your free tax clinic services
 - fill out and print the PDF
 - contact your CRA coordinator for available languages
- Volunteer recruitment postcards (RC637):
 - recruit volunteers to complete tax returns at your organization
 - available in English and French
- Submit the details of your clinics online:
 - send information about your clinics using our online form (Your CRA coordinator will provide the link to the form)
 - include as many details as possible as it helps the CVITP plan and provide support
 - option to post your clinic information (location and hours) on Canada.ca (Posting allows people to find your clinic using the [Find a tax clinic](#) tool)

Laptop donation program

When possible, the Government of Canada donates surplus laptops to schools, charities and service organizations, including those hosting free tax clinics.

If your organization needs a free laptop, fill out form [RC320, Community Volunteer Income Tax Program Laptop Donation Application Form](#). Please note that the CRA often receives more requests for computers than it can fulfill.

Donations are made to organizations, not volunteers. They are made on the condition that the organization agrees to actively take part in the program for three years.

Once a computer is donated, it no longer belongs to the CRA. The organization is responsible to keep the computer up-to-date and secure.

CRA electronic services

EFILE

[EFILE](#) is an automated service that permits those who complete tax returns on behalf of others to electronically transmit tax returns directly to the CRA using UFile CVITP software.

▼ Benefits of EFILE

- Faster refunds for individuals – since EFILE eliminates several manual steps, most tax returns transmitted electronically can be processed in as little as two weeks.
- Improved accuracy – before a tax return transmitted electronically is accepted for processing, a series of computer checks and balances are performed, resulting in greater accuracy.

- Paperless – there are no paper tax returns to file, and unless receipts are requested none are needed.

Auto-fill my return

Auto-fill my return is a secure online service that can automatically fill in parts of an individual's tax return. It uses information that the CRA has available at the time of preparation and can be used by CVITP volunteers when completing tax returns as early as 2017.

For more information on EFILE or Auto-fill my return, please refer to [EFILE for electronic filers](#), [Auto-fill my return](#) or the [CRA electronic services](#) page of the CVITP Learning Guide.

Resources

- [Canada.ca - Taxes](#)
 - answers to most tax-related questions
- [Free tax clinics](#)
 - register to volunteer
 - tax clinics operating in your area
- [Eligibility criteria](#)
 - quick reference for requirements individuals must meet in order to participate in the CVITP
- [Video Gallery](#)
 - includes videos such as installing UFile CVITP software and what to expect as a volunteer
- [Forms, job aids and fact sheets](#)
 - lists forms needed for preparing tax returns, as well as other documents for assisting CVITP volunteers and organizations
- [Contacts and links](#)

- helpful links for additional or expanded information not covered in CVITP Learning Guide
- mailing addresses for paper tax returns
- phone numbers, including the CVITP dedicated help line: 1-866-398-3488

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