

# Tax clinic preparation

## Recommended timeline

**Tax clinic preparation can begin at anytime, but if you are preparing for tax filing season (March/April) it is best to start in October if possible. The following is a *recommended* timeline including many potential preparation steps.**

Depending on your tax clinic method and your on-site resources, *you may not need to do all of these steps*. However, it is best to get started as soon as possible – especially registering with CVITP online and arranging for CVITP training for your volunteers.

### Three months before tax time, or sooner

Site coordination	Engage CRA/CVITP
<ul style="list-style-type: none"> <li>Identify tax clinic schedule: anticipated days and hours of operation</li> <li>Identify number of volunteers and types of volunteers needed</li> <li>Begin recruiting volunteers</li> <li>Determine number of computer stations and printers needed for tax clinic site (When deciding number of volunteers and tax clinic schedule)</li> <li>Source any additional computers and printers needed (When deciding the number of volunteers and tax clinic schedule)</li> </ul>	<ul style="list-style-type: none"> <li>Organizations and Volunteers register with CVITP online (online registration typically opens for the following tax year in October each year)</li> <li>CRA CVITP Coordinators will be in touch with registered volunteers</li> <li>CRA CVITP Coordinators will be in touch with registered organization coordinators</li> <li>Volunteers receive CVITP training (January recommended)</li> <li>Make request for donated computers</li> <li>Request promotional material</li> <li>Verify volunteer list with your CRA CVITP coordinator</li> <li>Ensure that all volunteers are registered for EFILE</li> <li>Provide CRA CVITP Coordinator with a completed Clinic Information Sheet, where you indicate your clinic details</li> </ul>

## 2 months before tax time

Site coordination	Engage CRA/CVITP
	<ul style="list-style-type: none"><li>• Volunteers register for EFILE numbers online (this should be done at least 1 month before the clinic starts – the approval process can take up to 30 days)</li><li>• Gather <i>General Income Tax and Benefit Guides</i> for reference, in case of need for paper returns</li><li>• CRA CVITP Coordinators will be in contact with registered organization coordinators</li><li>• Volunteers receive CVITP training</li><li>• Make request for donated computers</li><li>• Request promotional material</li><li>• Verify volunteer list</li><li>• Ensure that all volunteers registered for EFILE</li></ul>

## 1 month before tax time

Site coordination	Engage CRA/CVITP
<ul style="list-style-type: none"><li>• Site coordinator establishes system for booking appointments (as required by delivery model) and communicating with individuals (email, phone number)</li><li>• Promote clinic to community: word of mouth, brochures, posters, email, newsletters</li></ul>	<ul style="list-style-type: none"><li>• CRA CVITP Coordinators will be in touch with approved volunteers</li><li>• CRA CVITP Coordinators will be in contact with registered organization coordinators</li><li>• Verify volunteer list with your CRA CVITP coordinator</li><li>• If required, advise CRA CVITP Coordinator that you need assistance with sourcing more volunteers</li><li>• Ensure that all volunteers are registered for EFILE</li></ul>

---

## 2 weeks before tax time

Site coordination	Engage CRA/CVITP
<ul style="list-style-type: none"><li>Volunteers receive any additional training needed locally</li></ul>	<ul style="list-style-type: none"><li>CRA CVITP Coordinators will be in touch with approved volunteers</li><li>CRA CVITP Coordinators will be in contact with registered organization coordinators</li><li>Verify volunteer list</li><li>If required, advise CVITP Coordinator that you need assistance with sourcing more volunteers</li><li>Ensure all volunteers registered for EFILE</li></ul>

## 1 week before tax time

Site coordination	Engage CRA/CVITP
<ul style="list-style-type: none"><li>Site coordinator determines schedule of volunteers based on availability</li><li>Ensure tax clinic site has internet connection available</li><li>Determine whether any refreshments/food will be offered to volunteers or participants during tax clinic</li><li>Gather supplies for tax preparation volunteers: USB drives, notepaper, pens, staplers</li></ul>	<ul style="list-style-type: none"><li>Verify volunteer list</li><li>If required, advise CVITP Coordinator that you need assistance with sourcing more volunteers</li><li>Ensure that all volunteers registered for EFILE</li><li>CRA CVITP Coordinators will be in touch with approved volunteers</li><li>CRA CVITP Coordinators will be in contact with registered organization coordinators</li></ul>

## During tax time (March - April)

Site coordination	Engage CRA/CVITP
<ul style="list-style-type: none"><li>• Operate tax clinics</li><li>• Ensure ongoing maintenance of USBs with PDF tax forms – personal information deleted once returns have been filed</li><li>• Ensure ongoing collection of data as needed for your tax clinic site</li><li>• Ensure mentor / resource volunteer is available to answer questions for tax preparation volunteers</li><li>• Ensure ongoing site supervision for all volunteers and to ensure efficiency</li><li>• If possible, ensure technology support is available on an ongoing basis</li><li>• Ensure all tax information is deleted from USBs or computer hard drive – once the returns have been submitted</li></ul>	<ul style="list-style-type: none"><li>• Ensure volunteers keep track of the number of tax returns they complete</li><li>• Verify volunteer list with CRA CVITP Coordinator</li><li>• If required, advise CRA CVITP Coordinator that you need assistance with sourcing more volunteers</li><li>• CRA CVITP Coordinators will be in touch with approved volunteers</li><li>• CRA CVITP Coordinators will be in contact with registered organization coordinators</li></ul>

## After tax clinic has wrapped (May - onwards)

Site coordination	Engage CRA/CVITP
<ul style="list-style-type: none"><li>• As needed, take down tax clinic setup from site (i.e. return room(s) to original setup if normally used for other purpose)</li><li>• Thank volunteers</li><li>• Complete data collection and arrange data entry support if needed</li><li>• Record any 'lessons learned' to improve tax clinic for next season.</li></ul>	<ul style="list-style-type: none"><li>• CRA CVITP coordinator will send email to ask CVITP tax clinics to provide the number of tax returns filed. Reply to the email.</li><li>• CRA CVITP Coordinators will also contact organization coordinators regarding Certificates of Appreciation. Once this information is received, the certificates will be mailed to the clinic coordinator, who will then distribute them.</li></ul>

We are grateful to staff from Agincourt Community Services Association (ACSA) for their input which significantly contributed to this document.