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# How to get started as a CVITP organization



## 1. Register with the CVITP (Community Volunteer Income Tax Program)

This can be done online:

- The CVITP provides guidance and support to community organizations operating tax clinics, provides training and free income tax preparation software, and donates computers to eligible community organizations.
- To contact the CVITP, [fill out an online form](#) or call:
  - Pacific** 1-888-805-6662
  - Prairies** 1-866-315-8833
  - Ontario** 1-877-493-4064
  - Quebec** 1-544-233-9951
  - Atlantic** 1-855-516-4405

## 2. Recruit and train volunteers

As the host organization, recruiting volunteers is one of your main roles. This includes:

- Recruiting volunteers to prepare taxes and be trained by CVITP
- Ensuring volunteers are EFILE certified (contact CVITP Coordinator)
- Establishing roles for volunteers depending on your site needs. In addition to tax preparation volunteers, this could include greeter volunteers, intake volunteers, technical support people, or specialized resource volunteers who are knowledgeable about tax preparation and can act as on-site consultants.

## 3. Set up and promote the tax clinics

Ensure that your community is aware of your tax clinic. Set-up will also include:

- Booking site for the clinic
- Establishing clinic hours and days of operation
- Arranging computers or laptops
- Arranging an internet connection and printer
- Implementing a *tracking process* for clinic use (i.e. to track individual appointments, the number of tax returns completed)

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## Operational requirements



**All aspects of physical and organizational management of the clinic, and volunteers who will operate them are the principal responsibility of the organizations that partner with the CVITP.**

Key considerations here are:

- How many individuals in your community may require assistance?
- How many individuals can you reasonably expect to help?
- How many volunteers will you need to meet this goal?
- What size of facility will you need to accomplish this?
- What is the availability of the volunteers and your facility during March and April?
- Does your location have access to computers, printers/photocopiers, phone and the internet?
- Do you have a private spot to meet with individuals and families
- Do you have enough stationery supplies, such as: calculators, pens/pencils, envelopes, note paper, staplers and staple removers?

Some of these answers will depend on the time, dates, and specific location where you will host your clinic. Most tax clinics are held during March and April, since the CRA tax software and most individual tax slips may not be available before that time. Ultimately, it is your choice when and where to hold your tax clinic, based on volunteer capacity.

Consider whether your tax clinic will operate:

- During weekdays, weeknights, or a combination?
- During weekends?
- Daily, or a few days per week?
- A one-day clinic?

These answers will depend on when your community members are likely to attend, and when your volunteers will be available.

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## Information management



**Operating a tax clinic involves working with a high volume of personal and confidential information.**

Form TIS60, *Taxpayer Authorization*, must be completed and signed by all individuals who have a return prepared. Once completed, the TIS60 is returned to the individual.

**The organization and/or volunteer must never keep copies of completed TIS60 forms.**

In your day-to-day tax clinic operations, ensure that:

- All documents provided by the tax filers are returned to them
- All individual information is handled securely
- When a paper tax return is filed, the tax filer is responsible for mailing it
- When tax preparation software is used, the files generated must not be saved to a computer hard drive. Instead, save them to a USB drive or rewritable CD. If the return cannot be filed within 48 hours, a paper copy should be printed and given to the tax filer, and the file deleted from the USB.

Volunteers can use Form T1176, *Statistical Summary* to track the number of returns that they prepare. CVITP Coordinators may ask organization coordinators to provide statistics on how many returns their clinic completed each month.

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# Tax clinic delivery models: What it looks like

**Most tax clinics tend to operate by appointment, however this is not the only delivery model.**

Common types of tax clinics are:

- By appointment
- Walk-in/Drop-in
- Drop-off/Pick-up
- Year-round
- Combination of some of the above

## 1. By appointment

This method involves organizing appointment windows during the hours your tax clinic is scheduled to be open. We suggest dedicating 30-60 minutes for each tax return that needs to be prepared. Individuals phone or email to book their appointment.

<b>Suggested requirements</b>	<ul style="list-style-type: none"><li>• Someone to receive booking requests (email or phone)</li><li>• Scheduling software or calendar system</li><li>• Volunteers scheduled to be available during the appointment times</li></ul>
<b>Advantages</b>	<ul style="list-style-type: none"><li>• Individuals may be screened at the time of appointment booking</li><li>• Can use booking to confirm materials to bring, eligibility requirements, and answer questions</li><li>• Volunteers will be able to anticipate the number of individuals they will be serving on a given day</li></ul>
<b>Challenges</b>	<ul style="list-style-type: none"><li>• May need a plan to deal with “no show” appointments for individuals who do not show up at their booked time</li><li>• May need a plan to deal with “overflow” requests, if there are more requests than your clinic’s capacity</li></ul>

## 2. Walk-in/Drop-in

With a walk-in delivery model, individuals show up during the scheduled hours of your clinic, and they are served in the order they arrive. This does not require an appointment booking.

<b>Suggested requirements</b>	<ul style="list-style-type: none"><li>• A separate waiting room with chairs</li><li>• System of tracking arrivals, to support individuals in the order they arrive</li><li>• Greeter volunteer(s) to screen individuals for their eligibility and paperwork (since this has not already been done over the phone)</li></ul>
<b>Advantages</b>	<ul style="list-style-type: none"><li>• Does not require a system of booking and scheduling</li><li>• Eliminates the need to deal with “no show” appointments</li><li>• Individuals have some flexibility in when their tax filing can happen</li></ul>
<b>Challenges</b>	<ul style="list-style-type: none"><li>• May be harder to anticipate the number of individuals attending the clinic</li><li>• If demand is high, wait times for individuals can be long and/or frustrating</li></ul>

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### 3. Drop-off/Pick-up

This method involves individuals dropping off all of their paperwork for the tax return, and returning to collect their completed return at a later time. The return is completed by a volunteer working on their own, using the paperwork submitted by the individual.

#### Suggested requirements

- Scheduled time for individuals to drop off their tax returns
- Intake volunteer to receive paperwork and confirm all required information has been included
- Inventory system to securely track returns
- Method of checking ID of individual collecting completed return
- Setting a time frame for how long a volunteer takes to complete a return

#### Advantages

- Allows flexibility for individuals who have difficulty scheduling appointments
- Does not require system of booking appointments
- Tax preparer volunteers can complete returns at their own pace without the need to book appointments
- Eliminates challenges with “no shows”
- Requires less meeting space

#### Challenges

- Requires secure system to hold tax returns at various stages of completion – i.e. locked filing cabinets
- If any paperwork is missing from tax return, it cannot be completed without additional contact with the individual

### 4. Year-round tax clinic

This method is ideal for organizations/agencies with dedicated staff or volunteer support throughout the year.

#### Suggested requirements

- Year-round staff members or dedicated volunteer to prepare tax returns
- Year-round access to office space for tax preparers and for client intake (depending on appointment-based or drop-off-based method)

#### Advantages

- Allows support for individuals with multiple years of taxes to be filed, for example many years of back taxes
- Allows support for individuals needing follow-up support from their return, i.e. adjustments or help reviewing Notice of Assessment

#### Challenges

- Requires dedicated resources year round
- Requires staff or volunteers skilled in tax preparation, year round

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## Resources for more information

### [Community Volunteer Income Tax Program](https://www.canada.ca/en/revenue-agency/services/tax/individuals/community-volunteer-income-tax-program.html)

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### [Community Volunteer Income Tax Program: A Guide for Community Organizations](https://www.cchwebsites.com/content/pdf/tax_forms/ca/en/rc266.pdf)

[https://www.cchwebsites.com/content/pdf/tax\\_forms/ca/en/rc266.pdf](https://www.cchwebsites.com/content/pdf/tax_forms/ca/en/rc266.pdf)

### [Prosper Canada webinar: Insights on hosting volunteer income tax clinics](https://learninghub.prospercanada.org/knowledge/insights-on-hosting-volunteer-income-tax-clinics-webinar/)

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