Getting Your Taxes Filed Remotely

A STEP BY STEP GUIDE FOR COMMUNITY

BEFORE APPOINTMENT

1.) BOOK YOUR APPOINTMENT

Contact the Tax Clinic Coordinator at your local Social Service Agency to book an appointment with a tax volunteer.

2.) PREPARE YOUR TAX DOCUMENTS

Before your appointment, email a copy of your tax documents to the Tax Clinic Coordinator and ensure you have your ID number and Social Insurance Number available.

3.) PREPARE YOUR RECEIPTS

If you have receipts to claim for deductibles like prescriptions or child care, then please categorize these and total the amounts.

DURING APPOINTMENT

4.) CALL OR VIDEO CONFERENCE

At your scheduled appointment time, your assigned tax volunteer will call or video conference you to file your taxes. Ensure you are in a quiet location for your appointment.

5.) COMPLETE CVITP EFILE AUTHORIZATION

You will need to complete an authorization form before the tax volunteer can submit your taxes to the CRA. Please ensure you have internet access, or a printer, in order to complete this.

6.) SAVE YOUR DOCUMENTS

Once your EFILE is completed, the tax volunteer and Tax Clinic Coordinator will review your documents and email you a copy for your records within 24 hours.

AFTER APPOINTMENT

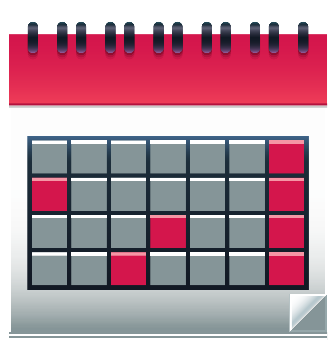
8.) BENEFITS NAVIGATION

If you would like to discuss Benefits Entitlements, please contact your Tax Clinic Coordinator after you have filed your taxes.

CVITP Remote Tax Filing Process

A STEP BY STEP GUIDE FOR VOLUNTEERS AND AGENCIES

BEFORE APPOINTMENT



1.) BOOK YOUR APPOINTMENTS

The Tax Clinic Coordinator will organise appointments with a tax volunteer as per their availability.

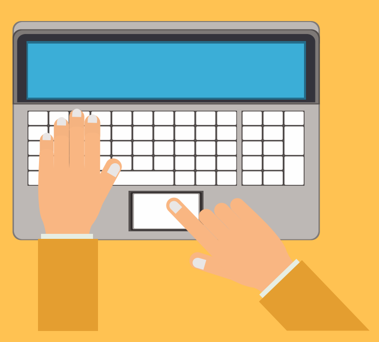
2.) PREPARE YOUR CLIENT DOCUMENTS

Ensure your client emails copies of their tax documents in advance of their appointment, then provide these to the assigned volunteer.

DURING APPOINTMENT

3.) CALL OR VIDEO CONFERENCE CLIENT

Your assigned volunteer calls or video conferences client at their agreed appointment time to EFILE.



4.) TAXES PREPARED FOR EFILE

Your volunteer prepares the client taxes for EFILE.

5.) COMPLETE CVITP EFILE AUTHORIZATION

Volunteer requests client to complete online CVITP authorization before submitting EFILE

1. Client completes Part A, B, C, and D in electronic form
2. Volunteer provides information for Part C, E, and F
3. Form submitted by client once complete
4. Completed authorization form emailed to client by Tax Clinic Coordinator.

6.) COMPLETE ANONYMOUS TRACKING SURVEY

Your volunteer will complete the Anonymous Tracking Survey with the client and email to Tax Clinic Coordinator.

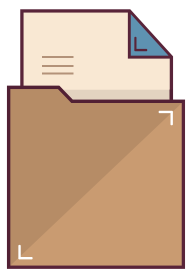
7.) SUBMIT, SAVE AND EMAIL DOCUMENTS

Once EFILE has been submitted, the volunteer is to save client documents and email to Tax Clinic Coordinator (One client per email).

AFTER APPOINTMENT

8.) BENEFITS NAVIGATION

If client would like to discuss Benefits Navigation details provided to Tax Clinic Coordinator for follow up.



9.) TRACKING DOCUMENTATION

Once all documents are received, ensure these are forwarded to the client for their records and noted internally.