# Suggested Crisis Tax Clinic Process

[This document was shared with us from the Aspire collective in Calgary, AB, demonstrating their emerging process for virtual tax filing. For more information contact Carlen Sheyk carlens@momentum.org ]

## Steps for Agencies

- Consider the role of the Taxpayer Authorization Form. This form is normally completed just prior to hitting submit and filing taxes on EFILE. This form is then printed off and given to the community member as a record. We now need to find new ways of hosting this process. Each agency is being asked to create their own Taxpayer Authorization form and process. At Sunrise, we have created an online form on our website that can be completed by the community member and submitted to us. If your agency would like Sunrise's help in hosting a webpage for these paperwork transactions, contact darlened@sunriselink.org.

  At the end of each appointment, volunteers will request community members to complete the Taxpayer Authorization Form. Sunrise is facilitating this process through our website: https://www.sunriselink.org/cvitp-authorization

  A. Client completes electronic form Part A, B, C, and D
  B. Volunteer provides information for Parts C, E and F
  C. Form is completed and submitted by client
  D. Volunteers ask client to read them what is says on their screen after hitting submit

  E. Social Service Agency will forward completed authorization form to community members

- Contact your volunteers to confirm their participation in income tax filing using the phone or video conferencing
- Confirm that you have all volunteer's phone numbers and that they have your phone number and email so they can contact you when they need to.
- Confirm the details of this new process with your volunteers, including informing them to expect each client's documents and contact information emailed to them from you
- To help keep things organized, we are asking volunteers to email each community member's files separately
- Confirm the details of this new process including using the new online Tax Filer Authorization Forms with community members
- Email your volunteers and ask them to download UFILE to their computers
- Make sure you have given your volunteer their UFILE activation code
- Confirm your volunteer's UFILE access and capabilities
- Talk to your volunteers about how to block their personal phone numbers
- Schedule your volunteers for appointments

- A security measure could be put in place: Sunrise Tax Coordinator is providing the client with the volunteers name and Electronic Filer Number. When the volunteer calls, they provide this information to the client to ensure they are speaking to the Sunrise Volunteer
- There is more flexibility available now that folks will be filing together from home, so feel free to schedule evening and weekend appointments as needed
- Please keep updating the Covid Impact tracking sheet on the Taxes and Benefits SharePoint site
- Please continue to remind your volunteers about the Anonymous Data Tracking Sheet

## Steps for Volunteers

Thank you for your volunteerism and community spirit. We have developed a new process for conducting tax-filing with our lower-income neighbours. We believe this process allows us all to move forward towards getting taxes filed by the new deadline of June 1st, 2020.

- Tax-filing will be done over the phone or via video conferencing.

- Suggested security measure: Sunrise volunteers are to provide their Name and Electronic Filer Number to client for verification.
- Community members will provide copies of their tax documents to the Tax Filing Coordinators at the social service agency that they know and trust to help them file their taxes
- Tax Filing Coordinators will email you taxation documents for each client
- Prior to calling a client, ensure you have blocked the number you are calling from, to ensure your privacy.
- Continue to fill out the Anonymous Data Tracking Sheet (front and back) for each client, including doing one sheet per person in a couple or household.
- Talk the client through completing the TaxPayer Authorization Form online and provide your volunteer information for the relevant fields
- At the end of each appointment, volunteers will request community members to complete the Taxpayer Authorization Form. Sunrise is facilitating this process through our website: https://www.sunriselink.org/cvitp-authorization

  Suggested Process
  1. Client completes electronic form Part A, B, C, and D
  2. Volunteer provides information for Parts C, E and F
  3. Form is completed and submitted by client
  4. Volunteers ask client to read them what is says on their screen after hitting submit
  5. Social Service Agency will forward completed authorization form to community members
- Once the taxes are completed, email all appropriate EFILE documents to your volunteer coordinator for distribution to community members.

- Ensure you email client documents separately (1 client per email) back to your Tax Clinic Coordinator.
- Check with the client if they would like to discuss Benefits entitlements and if they would, pass their information along to the Tax Clinic Coordinator
- Thank you for your commitment to helping Calgarians.

## Steps for the Public

- We are here to help you get your taxes filed
- Contact the Tax Clinic Coordinator at one of your local Social Service Agencies who run Tax Clinics. For a full list : https://apps.cra-arc.gc.ca/ebci/oecv/external/prot/cli_srch_01_ld.action
- A Tax Clinic Coordinator will schedule you into a phone or video conference appointment with a Community Income Tax Program volunteer who will help you file your taxes
- Send  an email to the Tax Clinic Coordinator with copies of your income tax documents, including T4's
- Put together all your receipts into categories like prescription receipts or child care receipts and total up the receipts within each category to help during your appointment with your volunteer tax filer.
- You will need to provide your Tax Clinic Coordinator with an Authorization Form that gives permission to the volunteer you are working with to file on your behalf. The Tax Clinic Coordinator will talk you through how to fill out this form and send it in.
- Your taxes will be prepared using EFILE or a similar software.
- You will be asked to submit a Taxpayer Authorization Form to your social service agency. This form will then be emailed to you for your records.