

Welcome!

- Thank you for joining the webinar on **Delivering virtual tax clinics: How to prepare and steps to consider** hosted by Prosper Canada.
- The presentation will begin shortly. (Audio will begin when the presentation starts)

Technology Details:

For technical assistance, please call GoToWebinar support line **1-855-352-9002**.

- Participants should connect using VOIP. Please check that the volume is turned up on your computer.
- If dial in option is required, please dial in as follows:
 - Tel (Canada): **+1 (647) 497-9429**
 - Access Code: **884-795-796**
 - Toll free option not available

Webinar logistics

- **Audience members have all been put on “mute”** for this webinar
- Presenters will be joining via **audio only** to conserve bandwidth
- Please **share any questions you have using the “Question box”** (located in the control panel at the right side of your screen).
- **We will share webinar slides with all participants and post a recording** of the session within a few days.



Land acknowledgement

Prosper Canada – Who we are

Founded in 1986, Prosper Canada is a national charity dedicated to expanding economic opportunity for Canadians living in poverty through program and policy innovation.

As **Canada's leading champion of financial empowerment**, we work with governments, businesses and groups to develop and promote financial policies, programs and resources that transform lives and foster the prosperity of all Canadians.

We help service systems and organizations in all sectors to build proven financial empowerment approaches into their businesses in ways that:

- Are **sustainable**
- Help them **achieve their goals**
- Tangibly **increase the financial well-being of the low-income people** they serve.



1. Introductions: Our panel



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Today's presentation (1:00-2:00 ET)

1. Welcome and introduction

2. Preparing for tax clinics this season

- About CVITP, role of CRA and community organizations
- Impact of pandemic in 2020
- Training materials available, training website demonstration
- What's new for 2021
- Virtual clinics

3. Q&A

Our panelists would love to know more about you

- Your experience with virtual tax clinics so far
- Your volunteers this year – new or returning
- The training materials you rely on to prepare volunteers for tax time



Canada Revenue
Agency

Agence du revenu
du Canada

Community Volunteer Income Tax Program (CVITP) – Prosper Canada presentation



Canada



Introduction



Through the **Community Volunteer and Income Tax Program (CVITP) / Income Tax Assistance – Volunteer Program** community organizations host free tax clinics where volunteers file tax returns for eligible individuals.



The goal is to increase **benefit** and **credit** uptake by helping individuals complete their tax returns.



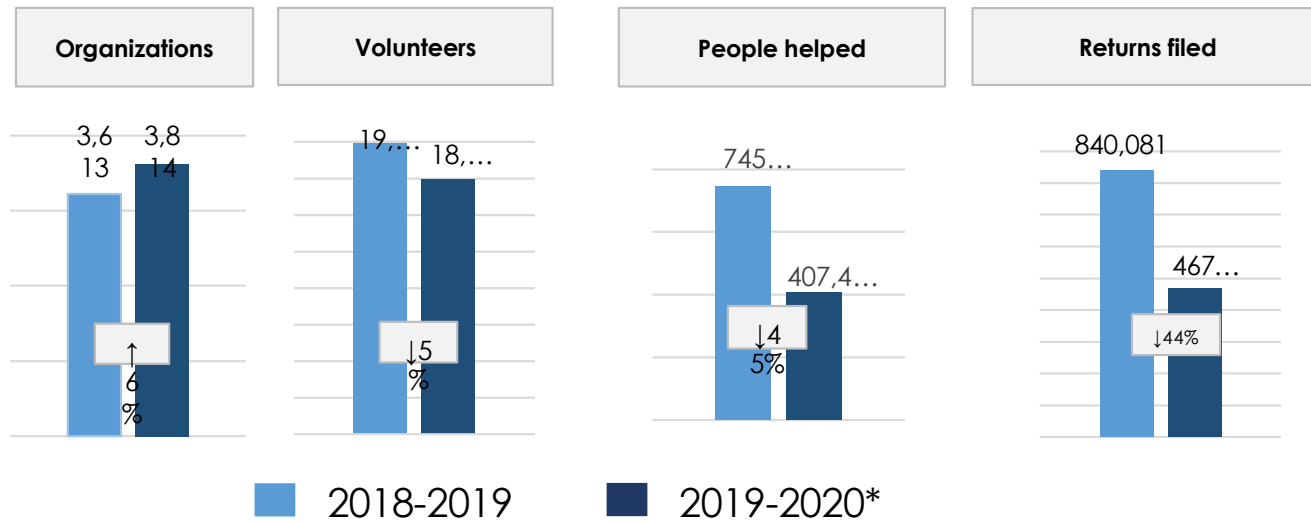
Volunteers and taxpayers connect through **clinics** where taxpayers go to have their returns completed.



Volunteers register online with **CRA** and are affiliated to an **organization**.



CVITP Program Highlights



*2019-2020 CVITP Program (May 16, 2019 - May 15, 2020)



Roles of an organization/CRA

Community organizations:

- host free tax clinics
- manage resources and volunteers
- keep taxpayer information secure and confidential
- make sure that volunteer registrations are approved before they start volunteering



CRA:

- offers guidance and support to organizations
- provides training for volunteers
- provides free tax preparation software
- operates a year-round dedicated help line for volunteers
- provides promotional material
- donates used laptops to eligible organizations





CVITP Recent Enhancements



- Improved the CVITP Management Tool (CMT)



- Improved data gathering to track demographic, geographic and income information



- New online training introduced



CVITP Volunteer Training

Two ways to learn:
Webinars

Website



Government
of Canada

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du Canada



MENU ▾

[Canada.ca](#) > [Taxes](#) > [Income tax](#) > [Personal income tax](#) > [Free tax clinics](#) > [Volunteer at a free tax clinic](#) > [Volunteer training](#)
> [Frequent client scenarios](#)

Persons with disabilities

Before you start

Individuals can claim the following disability tax credits (DTCs) on their federal return:

Related topics

[Preparing income tax returns:
before, during and after](#)



Webinars



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Training Website

Volunteer training



Whether you're a new or returning volunteer, your contribution is valued within your community and your affiliated organization.

To help eligible individuals file their Income Tax and Benefit Return, you need a basic understanding of how to complete simple tax returns.

This training is a good start to get you ready for your role. Let's begin!

[Before you begin](#)

Find out more about this training.

[Income tax basic concepts](#)

Learn about the basic concepts of income tax, benefits and credits.

[UFile overview](#)

Learn about the UFile [CVITP](#) tax preparation software.

[Preparing income tax returns: before, during and after](#)

Learn the steps to complete an income tax return.

[Using Auto-fill my return service for 2018 and subsequent year returns](#)

Learn how to use Auto-fill my return for 2018 and subsequent year returns.

[Using Auto-fill my return service for 2017 returns](#)

Learn how to use Auto-fill my return for 2017 returns.



Training on new initiatives





Resources

Helpful
links

Helpful phone
numbers

Provincial and territorial benefits
and credits

T1 lines comparison tables
(2018-2019)

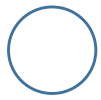
Useful
forms

Canada Workers Benefit (CWB): Working individuals and families earning a low income may be eligible to receive this refundable tax credit. Eligible individuals and families can apply for advance payments of this credit by filling out Form RC201.

Child and family benefit calculator: Use this tool to find out which CRA-administered federal, provincial, and territorial benefits and credits your client could receive, and to calculate how much their payments could be.



What's new for 2021?



- CVITP Organization Identification Number (COIN)



- Auto-fill my return can be used to complete returns for 2017, 2018, 2019 and 2020



- Virtual tax clinics



Virtual Clinics

Virtual clinics offer eligible individuals the option to have their taxes completed by a CVITP volunteer without any physical contact.

There are three types of virtual clinics:

- **video conferencing**
- **telephone**
- **modified drop-off clinic**





Virtual Clinics – what we’ve heard



Experienced CVITP volunteers were most comfortable with virtual clinics



Access to a reliable internet connection or a phone line is a must



Volunteer privacy is a concern – best practices include:

- creating an email solely for use as a CVITP volunteer and
- masking your phone number



Virtual Clinics – confirming identity

There are four ways a volunteer can confirm the identity of an individual:

- the organization knows the individual
- the volunteer can use Auto-fill my return
- visually through video conferencing
- by using CRA's authentication team





CVITP promotion

There are three phases to our CVITP promotion:



- volunteer recruitment

“Organizations and their volunteers make an essential contribution to helping Canadians receive their entitled benefits and credits.”



- clinic and program promotion

“Need help with your taxes? Get your taxes done at a free tax virtual clinic!”



- volunteer recognition



CVITP information



visit **Canada.ca/taxes-volunteer** to register
your organization today

Questions?



Thank you for joining us!

- **We will be sending you an email soon with:**
 - Slides from today's webinar
 - Link to webinar recording
 - Link to post webinar survey
- **We will also post the recorded webinar on our Learning Hub:**
- <https://learninghub.prospercanada.org/webinars/>

More on virtual tax filing: Join us again on Dec 9th

Virtual self-assisted tax filing: Learnings from a program pilot

- **Wednesday, Dec 9th** (1pm-2pm ET)
- Woodgreen Community Services
- EBO Ottawa
- Intuit/TurboTax

Register: <https://register.gotowebinar.com/register/5600644362296646670>

Visit our Learning Hub to view our catalog of past webinars



<https://learninghub.prospercanada.org/>

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