# **2023-2024 CVITP New Volunteer Registration Job Aid**

1. To complete your 2022-23 CVITP Volunteer Registration, visit www.canada.ca/taxes-volunteer.

2. Click Register to volunteer - Canada.ca

<u>Français</u>

a

Canada.ca > Canada Revenue Agency

# Volunteer to do taxes for people in your community



# Become a volunteer

Want to help people in your community? Do you have a basic understanding of income tax? Volunteer with a community organization to help people by doing their taxes! This year, organizations are hosting free in-person and virtual tax clinics. As a volunteer, you can choose to complete taxes in person or virtually by videoconference, by phone, or through a drop-off clinic.

With the Community Volunteer Income Tax Program (CVITP), you'll be helping thousands of people get their entitled benefits and credits. As a CVITP volunteer, you'll receive training, guidance, access to a dedicated help line, and free tax software.

Register to volunteer today!

# Become a participating organization

Make a difference in your community: register your organization to host free tax clinics. This year, you can choose to host in-person or virtual clinics. Your volunteers can complete taxes in person or virtually by videoconference, by phone, or through a drop-off clinic.

If you're interested in registering your organization with the CVITP, you can apply for a <u>grant</u> to help offset some of your costs.

The CRA will also provide your organization with free tax software, promotional products and laptops which are subject to availability.

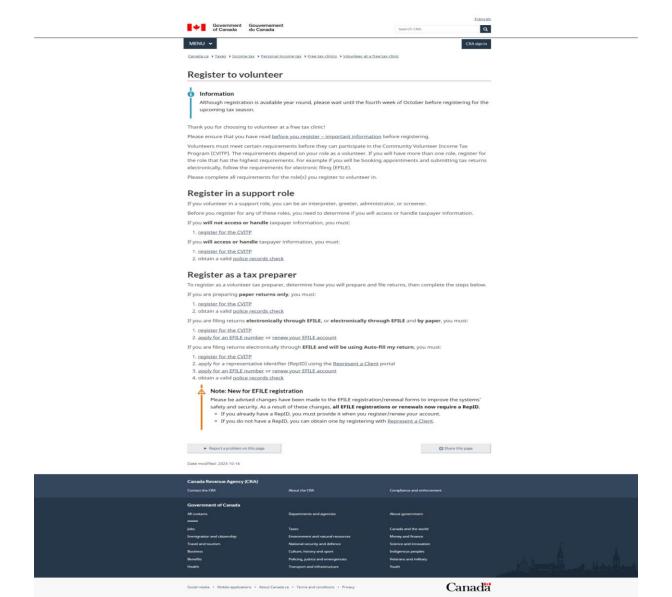
Register your organization.

# Participate in the Income Tax Assistance for Quebec residents

Looking to become a volunteer or to host free tax clinics in Quebec? Learn more about the <u>Income Tax Assistance – Volunteer Program</u> offered in partnership with Revenu Québec.



3. If you are volunteering in a support role, review the Register in a support role section. Once reviewed, click "register for the CVITP" to register. If you will be registering as a Tax preparer, scroll down to the next page



# 4. Review the program terms and check the declaration box. Then, click "Next".

Government Gouvernement of Canada du Canada

Français

# Volunteer registration 2024: Program terms

0% Complete





In order to volunteer with the Community Volunteer Income Tax Program (CVITP), you must read the program terms, the declaration section and the privacy notice, and check the Confirmation box.

### Program terms and conditions

### As a volunteer with the CVITP, I agree to:

- be physically located within Canada when preparing and submitting returns under the CVITP;
- · protect the taxpayer's privacy by never using or divulging any information provided by the taxpayer for any purpose other than preparing their income tax and benefit return;
- · offer my services free of charge and decline any monetary reward that may be offered to me;
- never use the CVITP tax software for monetary gain;
- return all documents containing personal information (e.g. completed returns, T slips, etc.) to the taxpayer or to the organization to which I am
- · have the taxpayer sign form TIS60, Community Volunteer Income Tax Program Taxpayer Authorization and return it to the taxpayer;
- only use the CVITP tax software to prepare returns for eligible taxpayers;
- · never copy the CVITP tax software or allow copies of it to be made;
- · transmit each return to the Canada Revenue Agency immediately upon completion, when possible;
- · delete all saved electronic copies of the taxpayer's return and any other electronic documents, no later than 48 hours after its transmission to and acceptance by the Canada Revenue Agency;
- allow the CVITP to share my contact information and registration approval with my affiliated community organization(s), or with other CVITP community organizations in my area if I require assistance to become affiliated; and
- · meet the CVITP security requirements.

### Declaration

I declare that I have never been convicted of any offence under the Criminal Code or any Act of Parliament that has not been pardoned or in respect of which a record suspension has not been ordered. This includes any offence involving evasion in the payment or remittance of tax; fraudulent transactions in which the public or any person is defrauded of property, money, valuable security or service; or possession of property obtained by crime or the proceeds of crime.

Personal information is collected under the authority of section 220 of the Income Tax Act (ITA), combined with paragraph 30(1)(a) of the Canada Revenue Agency Act and will be used to register volunteers, organizations and tax preparation clinics as part of the Community Volunteer Income Tax Program (CVITP) or the Income Tax Assistance – Volunteer Program (ITAVP) in Quebec. Information may also be used to assess suitability to participate in these programs and may be disclosed to the extent authorized by law. Automated personal information matching will be used to identify returning participants in order to avoid duplication of accounts. A refusal to provide the information may result in the rejection of your registration request.

ersonal information is described in Personal Information Bank CRA PPU 100. Under the Privacy Act, individuals have a right to have their personal information protected. They also have the right to access, correct or notate this information and to file a complaint with the Privacy Commissioner of Canada regarding our handling of their information.

### \* Confirmation (required)

 $\ \square$  I declare that I have read and agree with the program terms, the declaration section and the privacy notice.

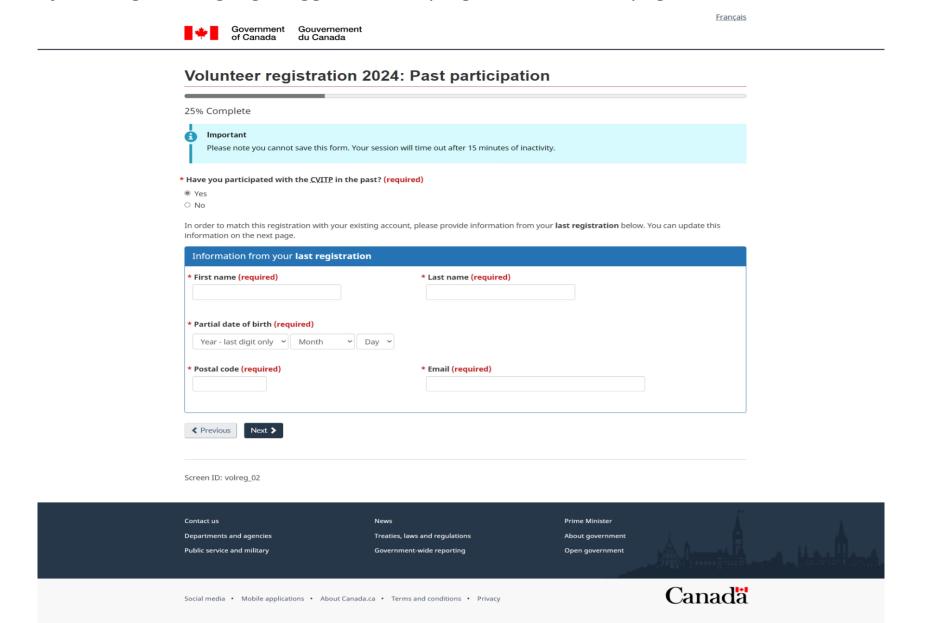


Screen ID: volreg\_01

Public service and military



5. As a new volunteer, you can select "No" for the question, "Have you participated with the CVITP in the past?". Then, click "Next". Note: At any time during the registration process, you can change the language of the form to French/ Français using the language toggle at the top right corner of the page



6. Proceed to enter your information on this page. When you reach the Postal Code field, click "Find" and then select your street address from the list accordingly.

Français



Contact us

Government of Canada

Gouvernement du Canada

# Volunteer registration 2024: Past participation 25% Complete Important Please note you cannot save this form. Your session will time out after 15 minutes of inactivity. Have you participated with the CVITP in the past? (required) Yes No Previous Next >

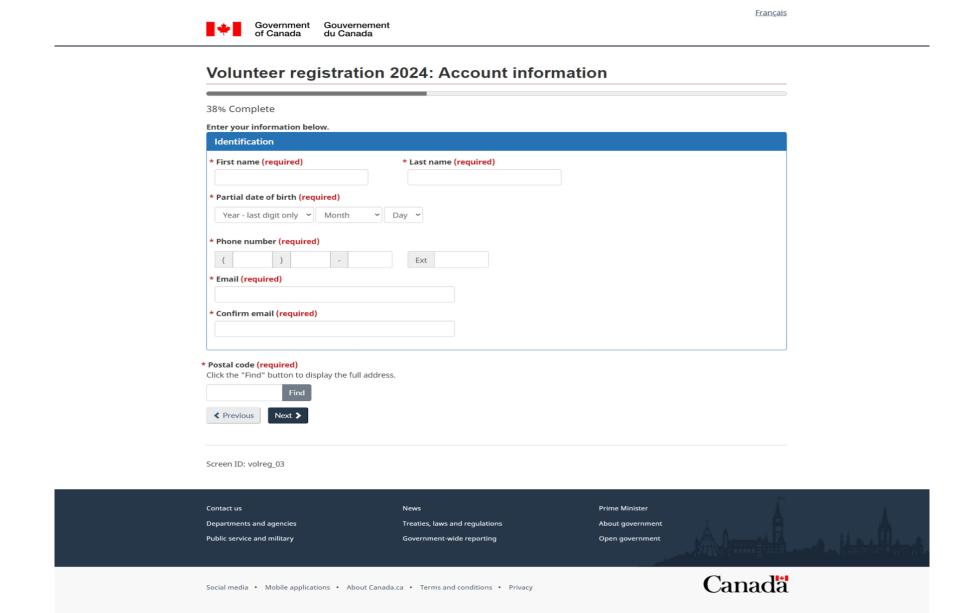
Departments and agencies Treaties, laws and regulations About government

Public service and military Government-wide reporting Open government

**Prime Minister** 

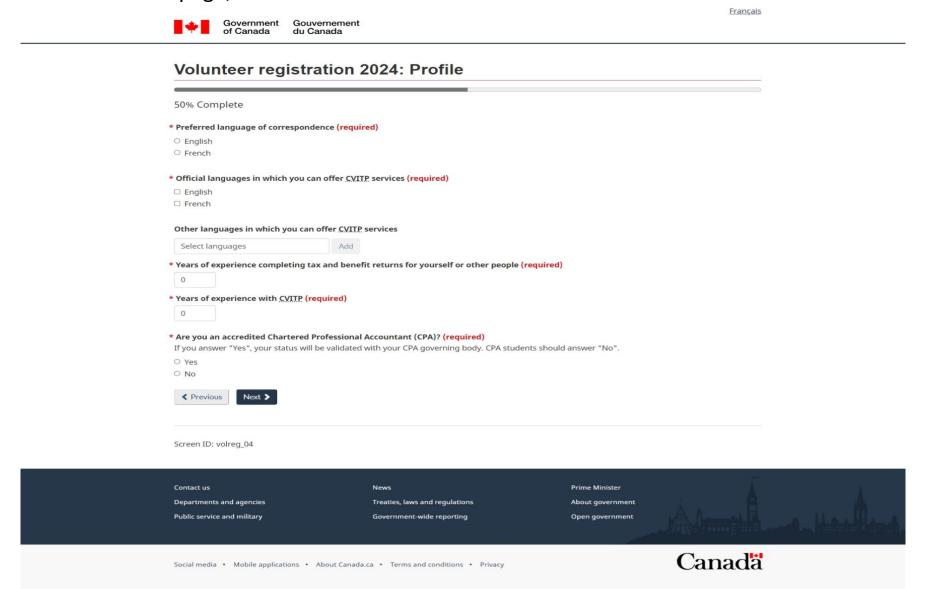


7. Your street name will be pre-populated based on the postal code entered in the previous screen. Enter your street number in the "Street number" field and complete the other fields as applicable. Then, click "Next".



UNCLASSIFIED

8. Select the official language that you can offer CVITP services in (English, French or both). If you can offer CVITP services in any other language(s), please select the language(s) from the drop-down menu and click "Add". If you add a language by mistake, you can check off the language on the list and click "Remove selected spoken languages" to remove it. Once you have completed all fields on this page, click "Next".

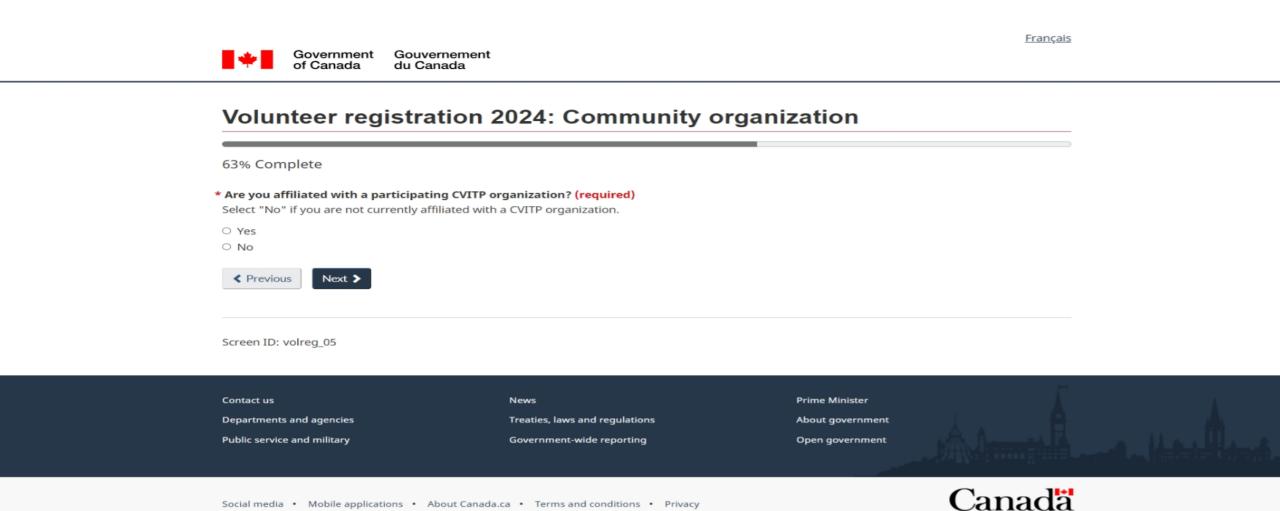


# Volunteer registration 2024: Role

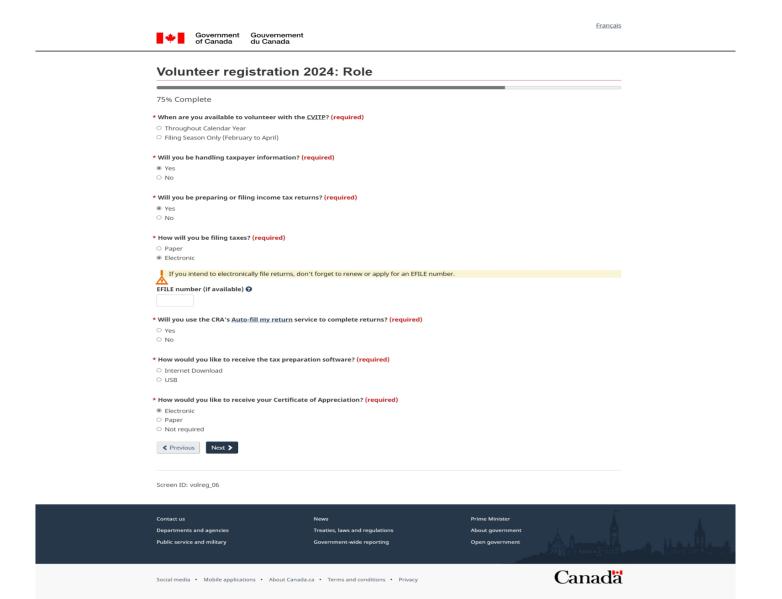
75% Complete \* When are you available to volunteer with the CVITP? (required) O Throughout Calendar Year O Filing Season Only (February to April) \* Will you be handling taxpayer information? (required) Yes O No \* Will you be preparing or filing income tax returns? (required) Yes O No \* How will you be filing taxes? (required) O Paper Electronic If you intend to electronically file returns, don't forget to renew or apply for an EFILE number. EFILE number (if available) 🕢 \* Will you use the CRA's <u>Auto-fill my return</u> service to complete returns? (required) O Yes O No \* How would you like to receive the tax preparation software? (required) Internet Download O USB \* How would you like to receive your Certificate of Appreciation? (required) Electronic O Paper Not required Previous Screen ID: volreg\_06



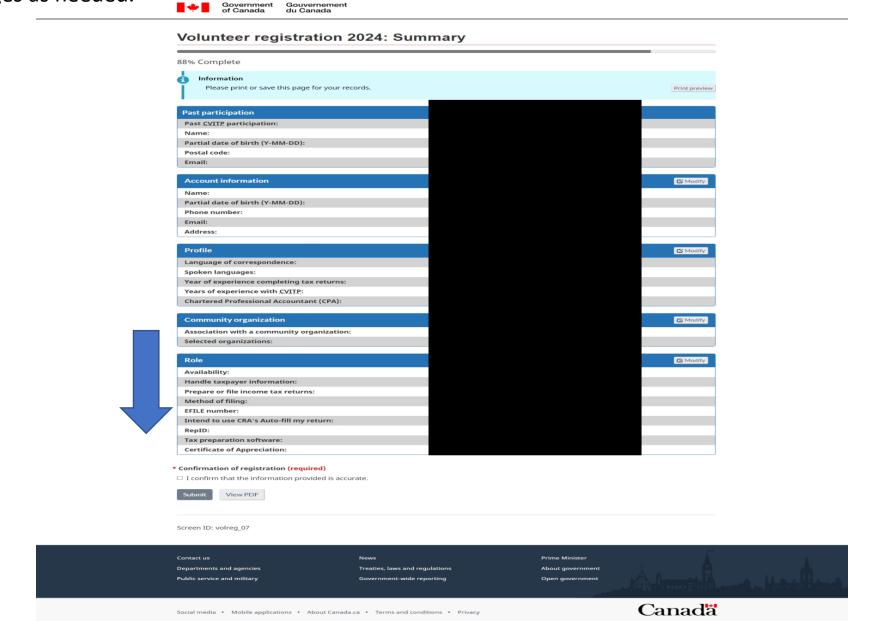
- 9. Select "Yes" or "No" to the question, "Do you have any current affiliation with a community organization?". You are indicating whether or not you are already affiliated with a participating CVITP organization. When completed, click "Next".
- 10. If you answered "Yes": Search for your affiliated organization(s) by selecting the province, city and organization name. Click "Add" then "Next.



# 11. Select your preferred responses and click "Next"



12. Carefully review the "Volunteer registration: Summary" page. Once reviewed and confirmed that the information is accurate, check the "confirmation of registration" and click "submit" to complete your registration. You can click modify to make any changes as needed.



Once you submit, you will receive your confirmation of registration. If you will be electronically filing income tax returns, please proceed to apply for or renew your CVITP EFILE number.

Français



Government Gouvernement

# Volunteer registration 2024: CVITP confirmation

100% Complete



### Confirmation of registration

Thank you for your interest in the Community Volunteer Income Tax Program (CVITP).

You will receive a Confirmation of volunteer registration email shortly. We will review your registration and a CRA coordinator will contact you if necessary.



## Renew or Apply for an EFILE number

If you intend to electronically file returns, don't forget about your EFILE number.

To apply for an EFILE number, click Apply for EFILE and look under How can I apply? to complete the EFILE Registration Online form.

To renew your EFILE account, click Yearly renewal and look under Yearly renewal, and click log in to access the EFILE log in page.



As of October 17, 2022, EFILE requires a RepID when you renew or apply for an EFILE number. If you do not have a RepID, you can register for one at Represent a Client.

Screen ID: volreg\_08

Departments and agencies Public service and military