

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

1. To complete your 2022-23 CVITP Volunteer Registration, visit [www.canada.ca/taxes-volunteer](http://www.canada.ca/taxes-volunteer).

2. Click [Register to volunteer - Canada.ca](#)



## Volunteer to do taxes for people in your community



[Become a volunteer](#)

[Become a participating organization](#)

[Volunteer in Quebec](#)

### 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 [grant](#) 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 [Income Tax Assistance – Volunteer Program](#) 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

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## Register to volunteer

Information

Although registration is available year round, please wait until the fourth week of October before registering for the upcoming tax season.

Thank you for choosing to volunteer at a free tax clinic!

Please ensure that you have read [before you register – important information](#) before registering.

Volunteers must meet certain requirements before they can participate in the Community Volunteer Income Tax Program (CVITP). The requirements depend on your role as a volunteer. If you will have more than one role, register for the role that has the highest requirements. For example if you will be booking appointments and submitting tax returns electronically, follow the requirements for electronic filing (EFILE).

Please complete all requirements for the role(s) you register to volunteer in.

### Register in a support role

If you volunteer in a support role, you can be an interpreter, greeter, administrator, or screener.

Before you register for any of these roles, you need to determine if you will access or handle taxpayer information.

If you **will not access or handle** taxpayer information, you must:

1. [register for the CVITP](#)

If you **will access or handle** taxpayer information, you must:

1. [register for the CVITP](#)
2. obtain a valid [police records check](#)

### Register as a tax preparer

To register as a volunteer tax preparer, determine how you will prepare and file returns, then complete the steps below.

If you are preparing **paper returns only**, you must:

1. [register for the CVITP](#)
2. obtain a valid [police records check](#)

If you are filing returns **electronically through EFILE**, or **electronically through EFILE and by paper**, you must:

1. [register for the CVITP](#)
2. [apply for an EFILE number](#) or [renew your EFILE account](#)

If you are filing returns electronically through **EFILE and will be using Auto-fill my return**, you must:

1. [register for the CVITP](#)
2. [apply for a representative identifier \(RepID\)](#) using the [Represent a Client](#) portal
3. [apply for an EFILE number](#) or [renew your EFILE account](#)
4. obtain a valid [police records check](#)

**Note: New for EFILE registration**

Please be advised changes have been made to the EFILE registration/renewal forms to improve the systems' safety and security. As a result of these changes, **all EFILE registrations or renewals now require a RepID.**

- If you already have a RepID, you must provide it when you register/renew your account.
- If you do not have a RepID, you can obtain one by registering with [Represent a Client](#).

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

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### Volunteer registration 2024: Program terms

0% Complete

 **Important**  
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 affiliated;
- 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.

**Privacy notice**  
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.

Personal 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)**  
☐ I declare that I have read and agree with the program terms, the declaration section and the privacy notice.

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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


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## 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

In order to match this registration with your existing account, please provide information from your **last registration** below. You can update this information on the next page.

### Information from your last registration

* First name (required)	* Last name (required)
<input type="text"/>	<input type="text"/>
* Partial date of birth (required)	
<div>Year - last digit only <input type="text"/></div> <div>Month <input type="text"/></div> <div>Day <input type="text"/></div>	
* Postal code (required)	* Email (required)
<input type="text"/>	<input type="text"/>

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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.

## 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

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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”.



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Volunteer registration 2024: Account information

38% Complete

Enter your information below.

Identification

\* First name (required)

\* Last name (required)

\* Partial date of birth (required)

Year - last digit only

Month

Day

\* Phone number (required)

()-

Ext

\* Email (required)

\* Confirm email (required)

\* Postal code (required)

Click the "Find" button to display the full address.

Find

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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”.

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## Volunteer registration 2024: Profile

50% Complete

\* Preferred language of correspondence (required)

☐ English

☐ French

\* Official languages in which you can offer CVITP services (required)

☐ English

☐ French

Other languages in which you can offer CVITP services

Select languages

Add

\* Years of experience completing tax and benefit returns for yourself or other people (required)

\* Years of experience with CVITP (required)

\* Are you an accredited Chartered Professional Accountant (CPA)? (required)

If you answer "Yes", your status will be validated with your CPA governing body. CPA students should answer "No".

☐ Yes

☐ No

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## Volunteer registration 2024: Role

75% Complete

\* When are you available to volunteer with the C.V.I.P.? (required)

- ☐ Throughout Calendar Year
- ☐ Filing Season Only (February to April)

\* Will you be handling taxpayer information? (required)


- ☒ Yes
- ☐ No


\* Will you be preparing or filing income tax returns? (required)

- ☒ Yes
- ☐ No

\* How will you be filing taxes? (required)

- ☐ 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 [Auto-fill my return](#) service to complete returns? (required)

- ☐ Yes
- ☐ No

\* How would you like to receive the tax preparation software? (required)

- ☐ Internet Download
- ☐ USB

\* How would you like to receive your Certificate of Appreciation? (required)

- ☒ Electronic
- ☐ Paper
- ☐ Not required

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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”.



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## Volunteer registration 2024: Community organization

63% Complete

**\* Are you affiliated with a participating CVITP organization? (required)**

Select "No" if you are not currently affiliated with a CVITP organization.

☐ Yes

☐ No

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11. Select your preferred responses and click “Next”



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Volunteer registration 2024: Role

75% Complete

\* When are you available to volunteer with the CVITP? (required)

☐ Throughout Calendar Year

☐ Filing Season Only (February to April)

\* Will you be handling taxpayer information? (required)

☒ Yes

☐ No

\* Will you be preparing or filing income tax returns? (required)

☒ Yes

☐ No

\* How will you be filing taxes? (required)

☐ 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 Auto-fill my return service to complete returns? (required)

☐ Yes

☐ No

\* How would you like to receive the tax preparation software? (required)

☐ Internet Download

☐ USB

\* How would you like to receive your Certificate of Appreciation? (required)

☒ Electronic

☐ Paper

☐ Not required

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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.


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## Volunteer registration 2024: Summary

88% Complete

 **Information**  
Please print or save this page for your records. [Print preview](#)

<b>Past participation</b>		
Past CVITP participation:		
Name:		
Partial date of birth (Y-MM-DD):		
Postal code:		
Email:		
<b>Account information</b>		<a href="#">Modify</a>
Name:		
Partial date of birth (Y-MM-DD):		
Phone number:		
Email:		
Address:		
<b>Profile</b>		<a href="#">Modify</a>
Language of correspondence:		
Spoken languages:		
Year of experience completing tax returns:		
Years of experience with CVITP:		
Chartered Professional Accountant (CPA):		
<b>Community organization</b>		<a href="#">Modify</a>
Association with a community organization:		
Selected organizations:		
<b>Role</b>		<a href="#">Modify</a>
Availability:		
Handle taxpayer information:		
Prepare or file income tax returns:		
Method of filing:		
EFILE number:		
Intend to use CRA's Auto-fill my return:		
RepID:		
Tax preparation software:		
Certificate of Appreciation:		

**\* Confirmation of registration (required)**  
☐ I confirm that the information provided is accurate.

[Submit](#) [View PDF](#)

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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.



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## 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](#).

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