

Tax Clinic Checklist for Volunteers



Preparing for your clinic (at least 1 week before):

<p>Call the organizer at your assigned clinic to confirm details:</p> <ul style="list-style-type: none"> • Date and time • Address of Clinic • Parking or direction issues • Ask about the number of clients • Ask about resources, such as wifi, computers, printers 	
Be prepared to bring your own laptop if a computer is not provided or be prepared to complete returns manually	
Review the Tax Clinic Guidelines (hard copy provided in your volunteer package)	
Review the contents of the USB provided	
<p>Complete and return a signed ProFile waiver*</p> <p>*Necessary only if you will be accessing the free ProFile software</p> <p>Note: Profile software is NOT compatible with Macs.</p>	
Download ProFile at least 2 days before your clinic to make sure there are no issues.	
Review the printing directions provided on your USB	
<p>If you must cancel your volunteer clinic for <i>any</i> reason:</p> <ul style="list-style-type: none"> • Call Juanita at 780-409-2569 • Call the organizer at your assigned clinic <p><i>Remember: up to 6 clients at your assigned clinic will be expecting you</i></p>	

The day of your clinic:

Check ProFile for any updates	
Arrive at your clinic at least 15 minutes ahead of schedule	
Bring any office products (pencils, paper, envelopes, stapler, stapler remover, sticky notes, and whiteout), calculator and other supplies you might require.	
<p>Remember: if you are not efilng- You must advise the client that it is their responsibility to mail the return to CRA</p> <p>If you are efilng the return - You must have the client sign a TIS60 form (paper copies at the organization or a pdf fillable form on your USB)</p>	