



# Centro Hispano Tax Clinic

## Utah Tax Clinic Able To Serve 30% More Clients Thanks To Canopy Donation

**Background:** Centro Hispano Tax Clinic is a Utah-based non-profit with two offices (one located in Provo and the other in Salt Lake City) that takes on tax resolution cases free of charge for low-income Latino individuals and families across Utah, Arizona, Idaho, Montana, and Colorado. The clinic only has two full-time employees: Sherry Almquist, EA and director of the clinic, and Geraldine Cole, a former IRS employee with 26 years experience in tax. In 2021 alone, the clinic served more than 600 clients, split between Geraldine and Sherry—a huge workload for just two individuals. When Geraldine started at the clinic a few years ago, she thought to herself: “There’s got to be a better way.” Thankfully, there was: Canopy. Since 2020, Canopy has offered its services to Centro Hispano free of charge, allowing them to take on more clients, help navigate complicated COVID-related tax issues, and decrease the clinic’s error rate.

“We could not do the work we’re doing without this donation,” Sherry said. “It is absolutely instrumental in helping us to be able to do the work that we’re doing, and it’s meaningful in our community.”

### COVID-19 exacerbated issues the clinic was facing

Even before the COVID-19 pandemic began, helping clients with their tax resolution cases was difficult enough. Sherry and Geraldine’s jobs are more involved than your average accountant, considering most of their clients don’t know how to fill out an envelope to mail forms to the IRS.

“They’re overwhelmed when they get here,” Geraldine explained.

Taxes can be complicated for an individual fluent in English and raised in the United States, so imagine how complex it can be for someone new to the country and learning these new laws not in their native language. That’s why the work Centro Hispano does is so crucial—every taxpayer has a right to access equitable information and resources.

Once COVID-19 hit, disrupting the entire accounting industry, life for Sherry and Geraldine got a lot more complicated. Between navigating stimulus payments, trying to maintain social distance requirements and figuring out remote work, it made their already overwhelming tax resolution cases even harder.

But, once the clinic implemented Canopy, the software was able to help them get organized and stay on top of their increasing workload.

“We’ve been able to meet the demands of the changes that COVID has caused, Canopy has enabled us to be able to meet those challenges,” Sherry said.

### BY USING CANOPY, CENTRO HISPANO TAX CLINIC HAS:



Served

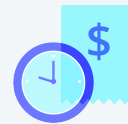
# 600

clients between two full-time employees



# 60%

increased efficiency



Saved

# 40%

more time



Served

# 30%

more clients

# “We've been able to meet the demands of the changes that COVID has caused. Canopy has enabled us to be able to meet those challenges.”

—Sherry Almquist, EA and director of Centro Hispano Tax Clinic

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## **With Canopy, communication is easier**

Sherry and Geraldine work in two different locations about an hour away from each other: Sherry runs the Provo clinic and oversees the entire program from there, while Geraldine heads up the Salt Lake City office.

With the two of them in two different offices, figuring out a better communication method was crucial. Since Sherry is the licensed Enrolled Agent of the clinic, she is responsible for communication to the IRS about all of the 600 clients the clinic serves.

Before Canopy, it was hard for Sherry to keep track of the details in each case managed by the Salt Lake clinic.

“All of the calls from the IRS come to me,” Sherry said. “Before canopy, I was getting calls about the Salt Lake clinic and I didn't know what was going on with their cases.”

Now, with everything all stored in one place, Sherry simply logs onto Canopy, looks up a client, and is able to relay all of that information to the IRS.

“I can get on and check Canopy and I can see everything that's going on with the case and be able to answer the officer's questions,” Sherry said. “I have all the data in front of me that we're able to share. It's good quality data because of the way that it's input into the system—it's reliable and there's nothing that's not meeting the marks with the IRS. So, that's perfect.”

This new process helps take the stress off of Geraldine as well, since she just needs to put client notes right into Canopy, rather than emailing back and forth with Sherry or being on call for last-minute phone calls if Sherry has a question about a certain case—instead, all of the data is stored in one place they can both access.

“Knowing that when I get a phone call, I've got the data right there—it's just really helped out a ton,” Sherry said.

## **With more organization, Centro Hispano has been able to help more clients**

Managing 600 clients across two people is no easy feat and it requires a lot of coordination and organization. Thanks to reliable document storage, client contacts, task management and client notes, Canopy has been a lifesaver for the clinic.

Sherry estimates the software has increased the office's efficiency by 60%, and allowed the clinic to take on 30% more clients.

“We wouldn't have been able to do it this year without Canopy. We wouldn't have been able to serve 615 people— it would have been impossible,” Sherry said.

For Geraldine, Canopy has helped her with client relationships as well. When she onboards a client, Geraldine is able to simply turn her computer screen around to show them what she is doing in Canopy. For her, transparency is important.

“We can both see what's going on, we can talk, I can hear their story—their stories are beautiful,” she said. “If all you're doing is filling out forms every day and not engaging with the people that you're with then there's no point coming.”

Canopy has been so impactful for Geraldine in her job that she said she would never work in another accounting job where Canopy wasn't used.

“I can't even tell you how much (Canopy) has helped our program and our efficiency,” Sherry said.

While the work Sherry and Geraldine is definitely difficult and at times a thankless job, knowing they've been able to help more than 600 taxpayers is very rewarding.

“That's what a nonprofit is, to meet the needs of your community,” Sherry said. “I'm not making crap for money, but as far as being fulfilled and being able to sleep at night, you know, it's kind of the best.”