ALAMEDA COUNTY VIRTUAL FIRST

March - 2021

Services accessible from anywhere, anytime, and any device

SUMMARY

In 2018, the Alameda County Board of Supervisors (BOS) updated its 10-year Strategic Vision using Google's 10x Thinking. The development of Vision 2026 included numerous brainstorming sessions involving County leadership, community representatives and a renowned futurist to discuss challenges likely to affect local services in the coming decade in how residents will expect to be served by local government. The plan is used to develop all departmental strategic plans, budget submissions, and any initiative submitted to the board. https://vision2026.acgov.org/index.page.

In response to Vision 2026, the ITD Strategic Plan, https://itd.acgov.org/plan.page, was created to identify how ITD's work supports the County's broader Strategic Vision. The ITD Strategic Plan is updated annually to ensure engagement and alignment. It includes key programs, how they roll up to major components of the County's vision, and a reference architecture used to summarize the entire IT program to ensure that information can be delivered in a secure and effective manner.

The COVID-19 pandemic accelerated the adoption of remote work by County employees and the effective delivery of virtual services through technology and other innovative initiatives. The BOS adopted the Guidance for Remote Work Arrangements and Virtual First Service Delivery (Remote Work/Virtual First) to its Vision 2026 in November 2020 http://www.acgov.org/board/bos_calendar/documents/DocsAgendaReg_11_24_20/GENERAL%20ADMI NISTRATION/Regular%20Calendar/CAO_304588.pdf. ITD responded by developing Virtual First.

Virtual First supports the mindset that all departmental operations run by County employees and all services that support our customers can be provided virtually. ITD led this initiative by working closely with departments to reengineer and automate operations and services that require customers or staff to come onsite. Great examples were Virtual Marriages, Virtual Board Room, Property Tax Payments, and a Chatbot to answer COVID-19 questions. Rapid Development Tools such as DocuSign, Microsoft Forms, and Salesforce were used to allow for quick delivery. Virtual First resulted in the employees of Alameda County working from home quickly and safely and customers obtaining the services they

needed remotely. The innovative Systems and Services provided virtually for 2021 are listed in the document below.

1. VIRTUAL FILING OF PROPERTY DOCUMENTS AND FORMS

To support remote work, Assessor needed to eliminate paper documents mailed in by the taxpayers and the cities for property assessments. In collaboration with ITD Assessor team Updated their website with eForms for taxpayers to send documents electronically. The information was made available to Assessor through their IMPROVE system. The documents were uploaded and stored electronically including Millions of archived paper documents which were scanned and stored electronically for easy retrieval.
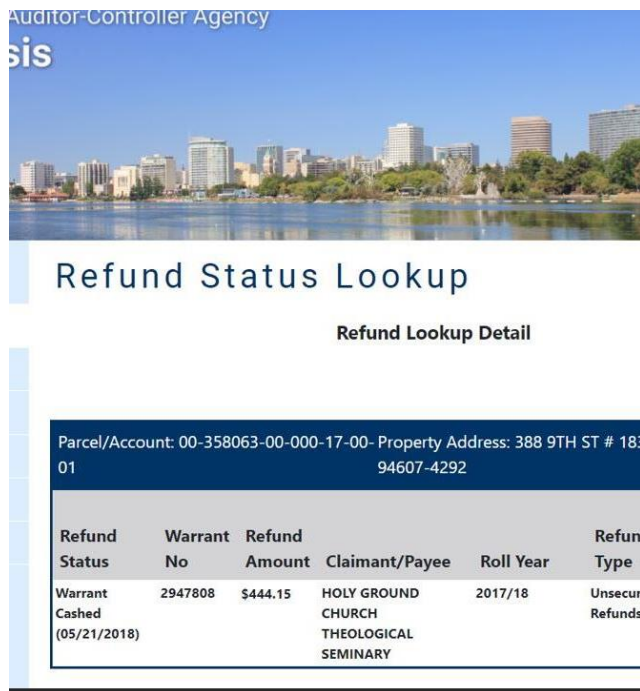
2. VIRTUAL MARRIAGES

In April, Governor Newsom issued an executive order to officiate marriages online. Auditor-Controller in collaboration with ITD Implemented a contact-free, electronic payment solution. The application and marriage certificate process became Virtual with the very first marriage in Alameda County being officiated on 5, 2020. ITD created a workflow to electronically route and sign the marriage certificate using DocuSign. This new business processes supported virtual marriages. Services were advertised on social media and Clerk-Recorder web site.

3. REFUND TRACKING PORTAL

Alameda County collects over $4 billion annually in property tax revenue from its over 500,000 taxable properties. Due to the occasional overpayment of taxes or tax roll corrections, the County issues around 15,000 tax refunds every year. The business process associated with tax refunds is complex and requires coordination between several agencies. This process was highly manual and records were maintained in various Excel spreadsheets and paper files. Taxpayers had to call on the phone to inquire about the status of their refund and wait for the county staff to locate their records and respond. The Auditor department calculated that they were spending close to 100 workdays annually just to respond to those inquiries.

To address these challenges, the Auditor and Treasurer-Tax Collector partnered with the county IT Department (ITD) to automate refund processing, with the goals to increase employee productivity, improve data integrity, and provide a new service to county residents to allow them to check their refund status online. The IT Department developed a new application to process refunds, which includes a portal where taxpayers can check status of the refund in real time.

Since its launch in October 2020, the system increased productivity of the County staff in handling refunds, consolidated multiple Excel spreadsheets into a single database, improved the integrity and consistency of the data, improved monitoring on the process, and provided the taxpayers a new online service allowing them to track status of their refund claim.

4. VIRTUAL BOARD MEETINGS

The State allowed Board Meetings to be held virtually. Alameda County chose to develop a hybrid format that allowed for a combination of a physical and a virtual meeting experience that was safe and

secure. The county used Zoom Webinar for safe public meetings. Board Room was upgraded with AV equipment to support Virtual Mtgs. New processes and procedures were created for the COB, ITD, BOS and the public to participate. Close Captioning was added for ADA Compliance. A library and talent was created to support public facing zoom meetings for use by all Depts/Agencies. Training of new procedures was established for the BOS, COB, ITD, Department/Agency heads, and the public to use the new platform.

5. COVID-19 SELF-SCREENING ASSESSMENT

The CDC recommended that all employees take a self-assessment test before beginning work. Human Resources in collaboration with ITD created a Self-Assessment screening form that employees can access from anywhere, anytime, and from any device. The screening is a set of questions which provides direction to the employees on whether they should return or stay at home. The County Announcement regarding the same was sent to all employees explaining the importance of filling out the form daily.
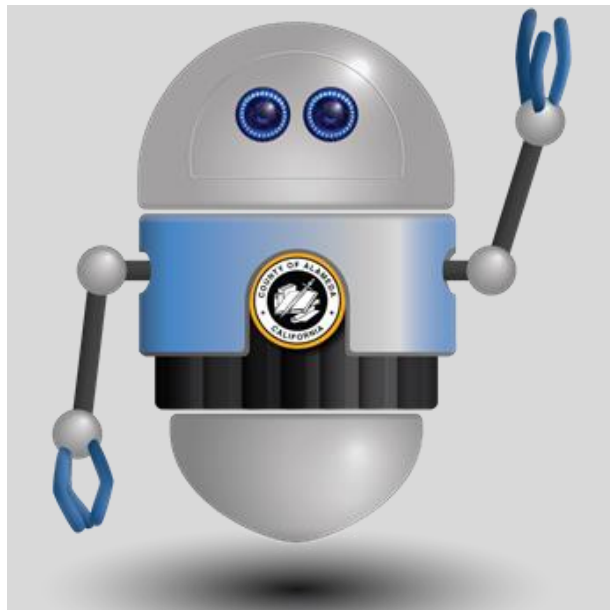
6. COVID-19 CHATBOT

As the pandemic started, nearly all the County's communication channels were bombarded with several questions, reports, and concerns regarding the pandemic and how to stay safe. With an influx of questions, Healthcare agency needed an immediate solution to help alleviate the stress on our communications channels and free up the staff to focus on more complex issues.

The project started with multi-department collaboration between four Healthcare departments, CAO, and ITD with limited scope and focused solely on handling COVID-19 related questions. Through agile planning and development cycle, the technology was locked down as Azure, the branding and functionality decided upon, and a working prototype was up in a matter of days.

Through internal testing and continuous learning on what our constituents were commonly asking about, we continued to develop the chatbot features to take advantage of multiple knowledge bases as well as different ways of interacting with the chatbot. This multi-lingual chatbot takes in content from both the CDC and the Public Health, as well as other county resources. It accepts typed-in questions and supports a menu tree system for those that want a guided path to the answers they seek.

The chatbot was launched on May 8th and recorded 5000+ questions soon after. Two more chatbots were created for IT HelpDesk and another for Probation. This new emerging technology implementation provides a blueprint for future chatbot developments. The existing chatbots continue learn and provide service to our constituents for years to come.

7. FAMILY VISITS FOR JUVENILES

With stay-at-home order during the pandemic, the Probation department allowed Juvenile detainees in the Juvenile Hall to visit their families in a safe manner. They made tablets available with Wi-Fi access points so families could have virtual meetings with the detainees.

8. VIRTUAL COURT HEARINGS

Probation department allow State and Federal courts to conduct virtual hearings for detainees at county jail. They set up network connections and Polycom units to allow State and Federal agencies to reach into County network making Alameda as the first jurisdiction in the state to successfully carry out a solution of this kind.

9. CLOUD BASED CASE MANAGEMENT

Implement the new cloud-based Tyler Supervision system so users could seamlessly access from anywhere. Implement the new Tyler Adult and Juvenile system. Staff can access from home and Probation officers can access from client locations

10. PUBLIC DEFENDER VIRTUAL VISITS WITH DETAINEES

Public defenders were finding it difficult to visit safely with detainees at the county jail or from the small video rooms. Set up Polycom clients so Public Defenders can meet with their clients from their desks.

11. SSA AC GREAT PLATES DELIVERED

A COVID-19 initiative was announced by the Governor of California to serve the qualified aging population. SSA in collaboration with ITD developed a web app which is available 24/7 that captures data from eligible applicant(s). It eliminates the need for in-person office visits and/or mailing and the paper printing. Since its launch, it has processed more than 2400 online applications. User Training and the online link was made available on the SSA Public and Alameda County websites.

12. SSA ECF37 – RECERTIFICATION

CalFresh is California's implementation of the federal Supplemental Nutrition Assistance Program (SNAP), which provides food benefits to no or low-income California residents. CalFresh households
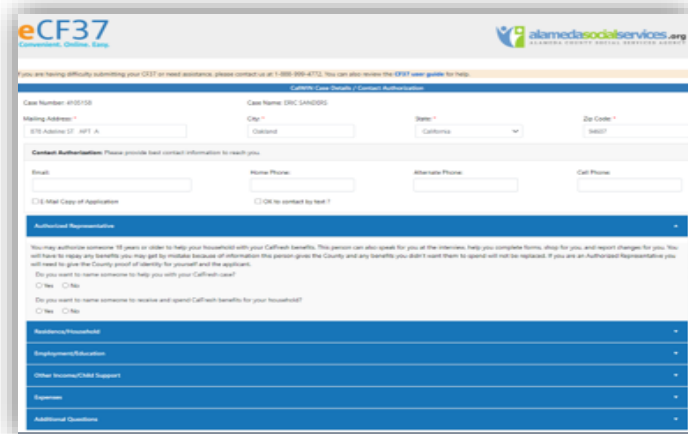
must "recertify" their eligibility by completing the Recertification for CalFresh (Form **CF-37)** before the last day of the month of their certification period to continue receiving CalFresh benefits.

Alameda County Social Services Agency (SSA), in partnership with Alameda County's Information Technology Department (ITD), launched a new online portal that automates the submission process, thus the recertification for CalFresh benefits is done online (**https://ecf37.acgov.org/**). This provides CalFresh recipients more flexibility to submit their Form CF-37 from anywhere, at any time, using any smart device. This provides a huge benefit to customers by simplifying the process of filing these reports on

time and helps prevent a break in aid when submitting through slower delivery methods, such as mail. Once completed, the County's new automated Form CF-37 is transferred directly into the County electronic document management system and eligibility staff will be notified and can review the Form CF 37 for completeness and accuracy. With the pandemic and associated shelter-in-place orders, this online recertification tool also provides recipients a safe and secure way to renew their CalFresh benefits.

The eCF37 was launched in November 2020 with a user-friendly web layout and using DocuSign for signatures. This site is offered in English with plans for adding Spanish and Chinese language options in April 2021. Since the launch, Alameda County has noticed an increase in online submissions of CF 37 forms. Since the eCF37 is a public-facing web application, Alameda County Social Services Agency partnered with the Alameda County Community Food Bank to conduct user testing and provide valuable
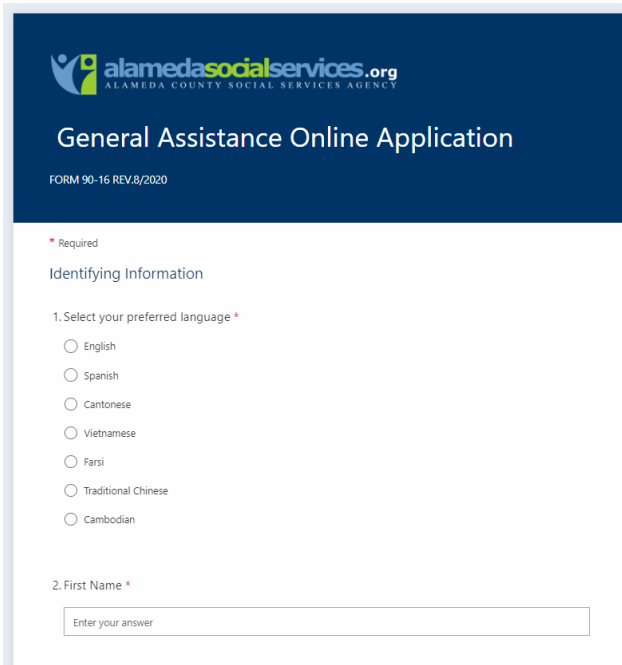
consumer feedback on the use of the system. The feedback has been tremendously positive with users

often reporting that they would use the application again and recommend it to others. Due to the pandemic, most businesses are prioritizing the 'Virtual First' approach. With this online recertification application to renew CalFresh benefits, Alameda County ticks one more application as 'Virtual First' so the public can

complete their CF-37 submission online without leaving their home to continue to receive their benefits.

The future releases of the eCF37 will include additional language options, including Spanish, Chinese, Cambodian, Farsi, Tagalog, and Vietnamese.

13. Enabling Remote Services for General Assistance

Alameda County Information Technology Department (ITD) collaborated with the Alameda County Social Services Agency (SSA) to successfully launch a General Assistance (GA) online web application that provides remote access options for individuals to apply for GA online without having to come into an SSA office. One of the goals of the project was to address an observable decline in program enrollment since shelter-in-place orders went into effect in March 2020.

Alameda County assists approximately 5,000 adults and emancipated minors, who have no other means of support, with monthly financial support

through the GA program. GA is a state-mandated program that is locally administered and funded by the County of Alameda.

The GA Application Online is accessible to the public anywhere from any device eliminating the need to physically come into SSA offices. The information in the application is then stored in a secure data center with controls and security elements in place to protect external access to Personally Identifiable Information (PII). As a result, this streamlines the process for SSA to keep track of new GA online applications safely and securely. Since its launch in September 2020, SSA has observed a steady increase in the number of GA applications submitted per month while keeping the community safe by enabling access to essential services remotely. The GA Online Application also improved keeping track of submissions and streamlined the process to distribute benefits to the community by receiving information electronically as opposed to re-entering information into the eligibility system from manually written submissions. As a result, this improves data accuracy while saving time so staff can process more applications or work on other tasks.

14. PENALTY WAIVER E-FORM

Due to COVID-19, many taxpayers experienced financial hardships. The number of requests to waive penalty for delayed tax payments increased. Penalty waivers used to be mailed by the Treasurer-Tax Collector office, but during shelter-in-place, obtaining a form became a challenge for the taxpayers. Treasure's office implemented an e-Form and supporting business processes to automate the approval and archiving of the digital form. The change was announced via press-release and social media.