

# ALAMEDA COUNTY VIRTUAL FIRST

March - 2023

Services accessible  
from anywhere,  
anytime, and any  
device



County of Alameda

# Information Technology Department

## 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%20ADMINISTRATION/Regular%20Calendar/CAO\\_304588.pdf](http://www.acgov.org/board/bos_calendar/documents/DocsAgendaReg_11_24_20/GENERAL%20ADMINISTRATION/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



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needed remotely. The pandemic accelerated the need to provide services and operations virtually and required that IT be nimble to deliver technology solutions rapidly. Examples include:

- Eliminate Homelessness - Project Roomkey enhancements that provide at-risk homeless and elderly a safe place to stay while recovering from COVID-19;
- Eliminate Poverty and Hunger – Automated the Social Service Client Concerns, a place for Social Service clients to report their care concerns.

Use of Low Code solutions such as Microsoft Forms, Salesforce, and DocuSign, allowed ITD to create automated solutions quickly with instant reporting and dashboards for the public, Board of Supervisors, and departments to use for visualization, operations, and decisions. These solutions took days with a point-and-click approach rather than months or years with thousands of lines of code.

The innovative Systems and Services provided virtually until 2023 are listed in the document below:

## **1. ARPA Grant App**

The County Administrator Office, Board of Supervisors, and Social Services Agency have partnered with Information Technology Department to develop and launch a constituent-focused multi-lingual application submission workflow system for Alameda County's local businesses that are negatively impacted by COVID-19 to apply online for ARPA cash aid grants. ITD used low-code technology to develop an informative secure approval workflow process that allowed local businesses to submit applications. Notifications were sent to the submitters and approvers as the application navigated through the approval workflow process.

The County allocated \$15 million to Supervisorial Districts for the ARPA Cash Aid Grants program with the goal that each Supervisorial District will provide grants to communities that were disproportionately impacted by COVID-19. Another \$4 million were allocated to SSA's Early Care and Education system which would provide one-time grants to eligible licensed Family Child Care and Center-based programs.



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The highly complex application process was simplified programmatically and innovatively which allowed users to complete the form and upload supporting documents securely. Using the approval workflow, the BOS users were able to process the applications end-to-end. To support the diverse community that speaks multiple languages, the system supported seven (7) different languages and managed 2,500+ applications.

## **2. Open Budget**

The County Administrator's Office (CAO) is responsible for developing and tracking the County budget. CAO provides leadership and guidance to county departments in the budget preparation process and oversees the implementation of the approved budget.

With a large operating budget of over \$3.6 million, CAO needed a way to promote accountability, transparency, and civic participation in the county's financial decision-making process. CAO partnered with the Information Technology Department (ITD) to design and build the website to allow flexibility and provide customization specific to the county's needs.

The new Open Budget website features a modern architecture that enables easy updates and data presentation while complying with accessibility guidelines and delivering a seamless user experience across all devices. Its user-centric design prioritizes easy access to critical information for county constituents, leveraging intuitive navigation and drill-down reports to drive user engagement and participation in the budget development process. The website's elegant design and advanced technology features facilitate efficient data management and sharing, enabling stakeholders to make informed decisions and gain valuable insights into the county's financial performance. Overall, the new Open Budget website is a state-of-the-art solution that leverages cutting-edge technology to deliver a modern, accessible, and engaging user experience for county constituents.



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### **3. HCSA Procurement App**

Health Care Services Agency (HCSA) in partnership with Information Technology Department (ITD) developed a centralized Procurement System which is being utilized to track, approve, and procure hardware, software, licenses, etc. for the agency. This was a huge shift from fragmented systems and manual processes to a modern procurement process that upgraded and improved transparency and accountability to purchase goods and services.

Some key strategies that were involved were the adoption of e-procurement tools which involved using digital technologies to streamline the procurement process, improve supplier relationships, improved data analytics, standardize processes and procedures, and prioritize ethical and sustainable sourcing practices. The system utilized a low code technology solution with a built-in approval workflow and integration with the ticketing system.

### **4. POLL WORKER TRAINING**

County elections officials depend on reliable, dedicated teams of election workers to make every Election Day run smoothly. These election workers should be prepared to correctly perform their duties on Election Day to best serve the voters. Hands-on training sessions about Election Day rules and procedures are always mandated for workers and they must pass to serve on election days.

Training usually occurs as close as possible to Election Day to increase the ability of poll workers to retain the information. Training and reference materials when made available online become a great resource for the workers as they can refer to them at any time during election day. Taking a quiz at the end of a course will help the Registrar of Voters (ROV) staff to identify the right worker to be recruited.

With many known advantages of having resources available online, Alameda County's ROV partnered with Information Technology Department (ITD) to build an online



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training system to train election workers. The solution was modernized in early 2022 to make it secure and accessible for election workers to take training anytime from anywhere on any device using a new LMS Platform that was integrated with the county's Poll Worker System.

## 5. AARP GIS

The East Bay Economic Development Agency (EDA) distributed \$11,000,000 in grants of up to \$10,000/each to small businesses in economically disadvantaged areas (Priority Zones) as part of an economic relief effort in the wake of the COVID-19 pandemic. These grants were an economic stimulus vital both to affected businesses and to the County's overall economic health. In June 2022, EDA approached the Alameda County Information Technology Department Geographic Information Systems team (ITDGIS,) asking for assistance in developing a way to verify that grant applicants were actually located in EDA-designated priority zones and to track grant distribution across racial and ethnic groups (demographics.)

ITDGIS recommended using *ArcGIS Survey123* (Survey123,) Esri's survey and analytics solution, to create an online grant application form, provide response analytics, and instantly map applicants' locations to validate eligibility. This approach made it easy for eligible businesses to apply for the grants and for EDA to ensure that grants were going to deserving businesses in designated priority zones and were spread equitably across demographics. Survey123's validation and analytics features obviated the extremely time-consuming task of geocoding addresses as part of application processing, significantly reducing staff time processing grant applications.

## 6. IHSS PA Provider Enrollment

Alameda County Social Services Agency (SSA) requires prospective service providers to enroll in the In-Home Supportive Services program by submitting completed application forms (SOC 846, SOC 426, and AC 70-8) either in person or by mail/fax. The staff screens the forms for completeness and then schedules the prospective providers to attend an in-person orientation. Upon the prospective provider's successful background check, they will be eligible to provide services and receive payment for services performed.



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SSA in partnership with Alameda County's Information Technology Department (ITD), launched a new online website that automates the enrollment and orientation process. The website (<https://ihsspe.acgov.org/>) provides prospective providers more flexibility to submit their applications from anywhere, at any time, using any smart device. Also, prospective providers can sign up to attend online orientations over Zoom. The application process assists in qualifying providers and enables orientation to be conducted remotely. With the pandemic and associated shelter-in-place orders, this online enrollment and training process provides prospective providers with a safe and secure way to enroll to be a provider.

## **7. Season of Sharing**

The Alameda County Social Services Agency (SSA), in partnership with Alameda County's Information Technology Department (ITD), launched a new application portal for the Season of Sharing (SOS), a philanthropic program designed to modernize and automate program operations and bolster the program's efforts to combat housing instability and address other critical needs for County constituents. The portal is an all-in-one solution with a workflow connecting clients, partner agencies, and program staff. The portal also addresses operational needs for remote/socially distanced service delivery, and it features heightened protection of client information, paperless processes, electronic storage, text messaging, electronic notifications, and detailed activity reports.

## **8. SSA - Dependency Investigating**

The Alameda County Information Technology Department (ITD) and Social Services Agency (SSA) partnered to develop and launch a mobile-friendly Dependency Investigations (DI) web application, significantly improving the business process efficiency and tracking that are critical to the petitioning of the safety and protection of a child in danger.

Prior to March 2021, SSA managed and assigned dependency investigations manually, using a single Excel file on a shared drive. Supervisors across multiple locations needed to enter information into the spreadsheet to keep track of case assignments. This was a frustrating and tedious process as only one person could update the spreadsheet at a time. In addition, the file



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would lock when line staff was looking up information, preventing supervisors from quickly assigning referrals. With multiple users having full permissions to the Excel file, there was a high risk of data loss and errors, and when errors did take place, they caused unnecessary business process delays.

SSA Children Family Services needed to modernize, automate, secure, and streamline the DI process to speed up referral times and increase data and staff efficiencies.

ITD incorporated all the functionality of the spreadsheet process in the new Web Application and improved upon it by enabling supervisors and line staff across the county to work in the system simultaneously. Many enhanced features were added to improve the overall effectiveness and efficiency of the assignment process.

Staff can now access the new DI app from anywhere, anytime, using any device. DI data is safe and stored in a secure data center with cybersecurity and physical controls in place to protect against unauthorized access and compromised or lost data. Since the app's release in March 2022, SSA reported: 656 new cases created and distributed, a 75% decrease in time managing DI case assignment and administration, and 97% system uptime.

## **9. Technology Acquisition Request (TAR)**

In 2022 the successful implementation of the centralized Technology Acquisition Request (TAR) system was achieved through multi-departmental and multi-agency collaboration. Information Technology Department (ITD) built an online system using low-code technology to request and review IT procurements across agencies.

The objective of the program was to automate the procurement request submission and reporting process to make the Technology Acquisition Review transparent, fast, and user-friendly. The solution was planned to be developed in late 2021/ early 2022 and go live by March 2022. Before making technology purchases, departments submit technology initiatives to the Information Technology Department (ITD) for review and recommendations with the goal of eliminating the duplication of systems and services, increasing system availability while



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improving services throughout the County, and having a consistent approach to implementing, maintaining, and enhancing cybersecurity capabilities.

TAR program has been set up to address the following policies in the county:

1. Centralized Technology Policy: Encompass new technologies and encourage agencies to partner with ITD for the management of common technologies to achieve greater efficiencies and enhanced security protection.
2. Cybersecurity Policy: To protect the county's technology and information assets by promoting consistent behavior across agencies, as well as providing guidelines to information owners on how their technology and informational assets can and should be managed and secured.

With the use of technology to automate the process of reviewing the request from a department, the tedious manual process has been greatly simplified by asking the right questions needed to decide if a technology purchase is needed or not. This new automation has made the process transparent and accountable with the automatic routing of approvals. The streamlined process is also accessible across departments and is mandated as part of a procurement request thereby making it possible to know all the technology needs in the county.

## **10. CRIMS-SB384**

Effective January 1<sup>st</sup>, 2021, SB384 transitioned California's lifetime sex offender registration schema to a tier-based schema. SB384 established 3 tiers of registration for adult registrants for periods of 10 years, 20 years, and life. SB384 allows the registrant to petition the superior court for termination of their sex offender registration requirement on or after their next birthday after July 1, 2021, following the expiration of their mandated minimum registration period. Registrants can petition to have themselves removed from the sex offender list and the "Megan's Law Website." Based on criteria listed in SB384, the court will either grant or deny the petition.

This program requires communication between Police departments, Sheriff Central Identification Bureau (CIB,) District Attorney's office (DA,) Courts and California Sex and Arson Registry (CSAR,) which was addressed by providing a common automated workflow



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platform in the CRIMS system. It aligns with the leadership priorities of social justice that promotes equity and helps to ensure that all residents of the county have access to the resources and opportunities they need to thrive.

So far, 146 sex offenders have petitioned, and 129 have been granted to be taken off the registry and Megan's Law website. All these cases were processed successfully through the newly developed CRIMS SB384 module. This program was innovative because it eliminated paper forms, provided real-time interfaces with various law enforcement partners, provided timely notifications to all parties, alerted law-enforcement of urgent tasks, and integrated with the existing PC290 sex-offender registration module.

This project is an exemplary example of multiple law enforcement agencies collaborating to solve a problem in which each one has a role to play, and the result benefits everyone. Regular meetings were conducted during the design phase involving Police agencies, DA, CIB, Courts, CSAR and ITD to finalize the optimum workflow.

## **11. Community Health Record (CHR)**

The successful implementation of Alameda County innovative Community Health Record (CHR) system was achieved through multi-departmental and multi-jurisdictional collaboration among several public and private agencies and healthcare partners. With 1.8 Terabytes of data and 1.6 Million patient records, CHR connects with data sources from multiple external providers like: Alameda Alliance for Health, Anthem Blue Cross, Collective Medical, John George Psychiatric Hospital, St. Rose Hospital, ACBH (Mental Health and SUD), Homeless Management data, Jail Data and more.

The CHR system is managed by UpHealth, Inc. and is innovative because it uses referential data matching software from Verato to match and link patient data to resolve any discrepancies or duplicates, provides privacy framework to securely hold sensitive information, and is designed to improve patient outcomes by providing healthcare providers with a comprehensive view of a patient's health history, regardless of where they received care.

The CHR system is designed to be interoperable with other health information systems, allowing healthcare providers to access patient records from a variety of sources, including electronic



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health records (EHRs) and other health information exchanges. The CHR system uses advanced data security and privacy protocols to protect patient health information, and patient consent is obtained before their health information is shared through the system.

The CHR system provided several benefits, including improved care coordination by 20% reduction in hospital readmissions, better patient outcomes by 14% reduction in mortality rates, and reducing healthcare costs by 7%. By allowing healthcare providers to access a patient's comprehensive health history, the CHR system helps avoiding duplicate tests and procedures, improving diagnosis accuracy and reducing the risk of medical errors. The CHR system also allows healthcare providers to identify and address gaps in care, such as missed appointments or medication refills, which can improve patient outcomes and reduce healthcare costs in the long term.

## **12. ACGOV ContactUs Chatbot**

In accordance with the County's Vision 2026 goal of Accessible Infrastructure, the County continually improves constituent services by making them accessible wherever, whenever, and on whichever device they choose.

More and more constituents are looking to engage with government online, and so, the County must modernize its legacy applications and processes. Many of the typical County functions, such as ordering documents or paying taxes, are fully available online now, as well as many previously in-person only processes such as Season of Sharing grant applications. As services move online, the County takes a constituent-centric user experience approach to ensure these processes are as easy to use as possible and are accessible to all.

To improve on the experience over time, the County uses analytics and feedback gathered from its various touchpoints such as websites, social media, mobile apps, call centers, and counters. The constant two-way communication between the public and the County keeps the improvements coming.

This continual improvement process is aided by adopting new technologies focused on automation and AI. The County already has six chatbots in use. The newest chatbot on the main



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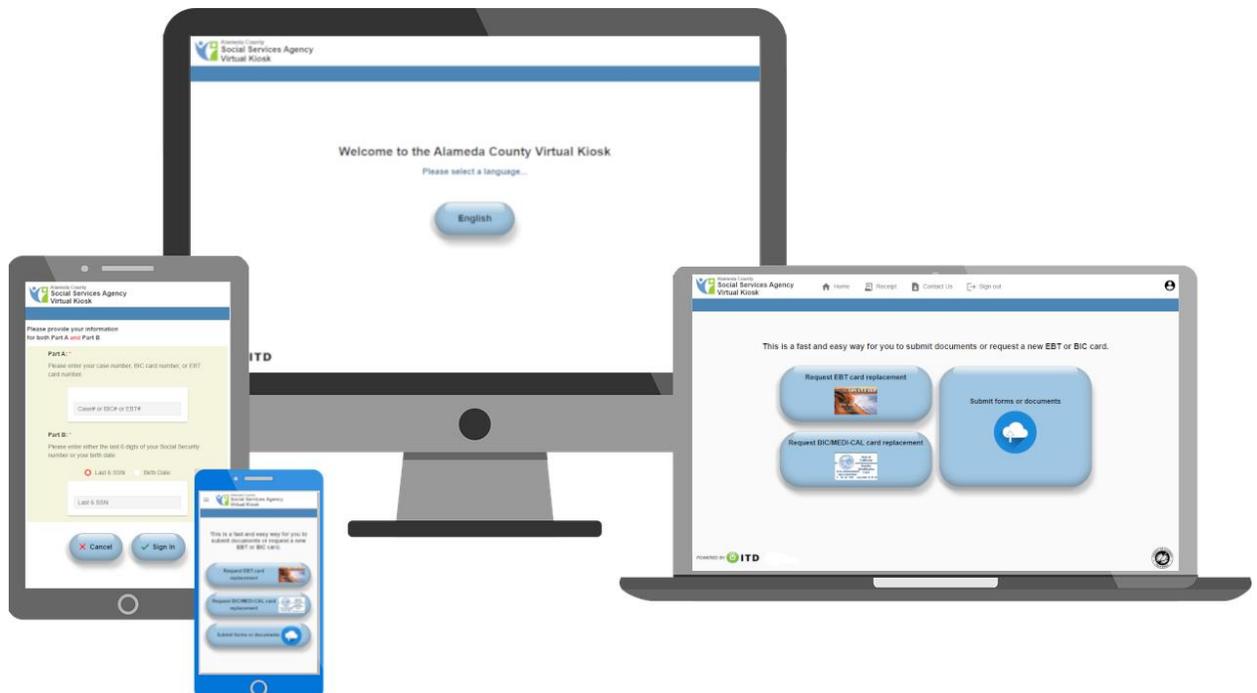
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County website launched in Dec 2022 and was implemented to reduce customer calls and cut down on emails about commonly-asked questions. The chatbot is continually updated and has already reduced email volume by 81%. This is just one example of giving the users more than one channel for getting the help they need.

The ACGOV chatbot remedies these problems and aligns with the priorities of increased constituent engagement and providing better customer experience. By creating the chatbot, ITD created a user 'wow' experience, answered users' questions more quickly, and significantly reduced staff time related to this task. ITD and multiple departments collaborated to create the chatbot, and it is continuously trained to stay current.

In the two-week period after the Chatbot went live, the ITD Web Team saw an 81% decrease in the number of emails coming from the Contact Us page. All County Departments appreciated ITD's modernizing the way we communicate and the use of low code technology to develop systems in very short time frames, as they not only save time and money but also add tremendous capabilities to the Alameda County Development Platform.

## 13. SSA VIRTUAL KIOSKS



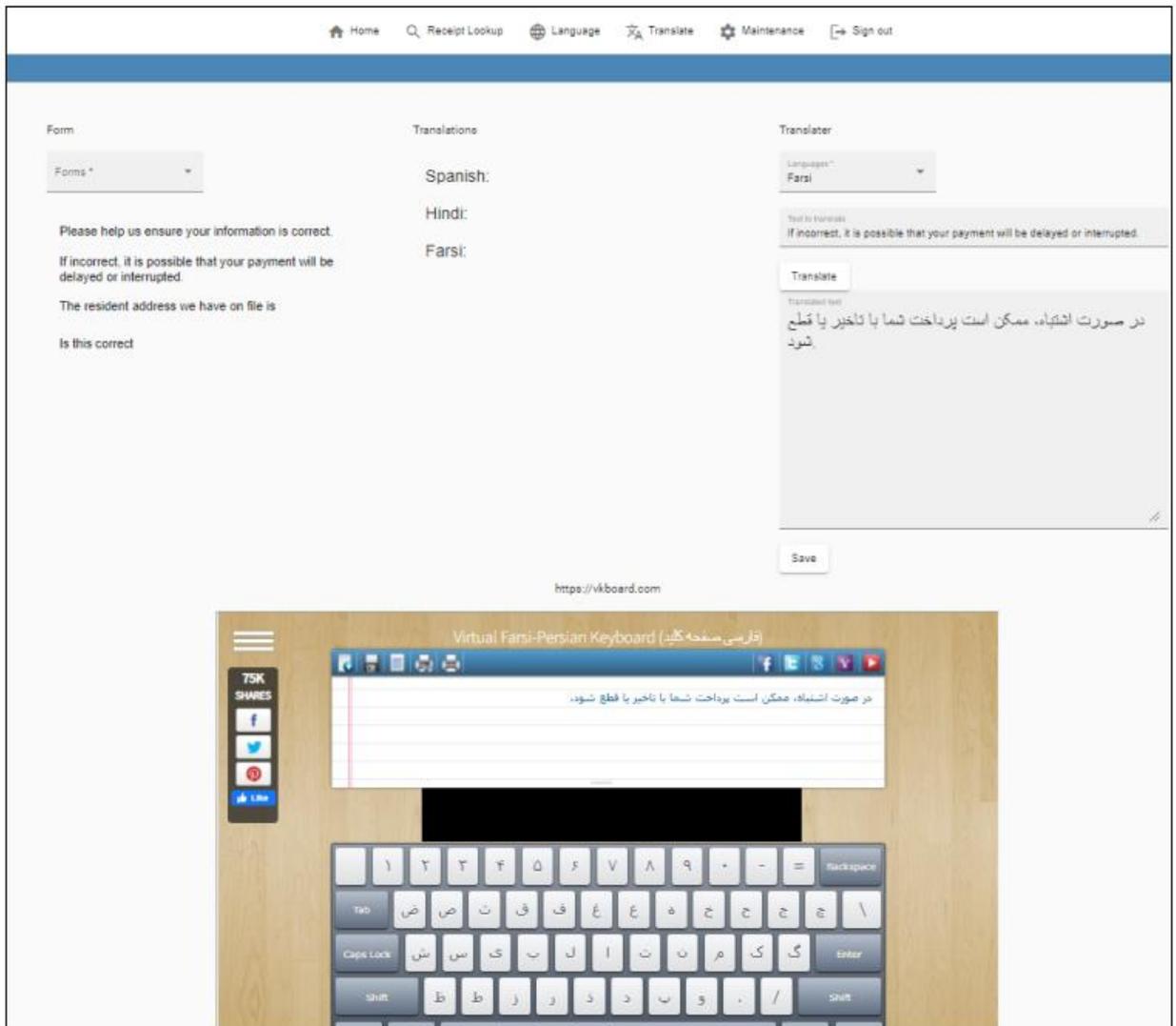


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Alameda County Information Technology Department (ITD) collaborated with Alameda County Social Services Agency (ACSSA) to successfully launch a mobile friendly Virtual Kiosk web application that allows for Alameda County residents to submit documents and/or request a replacement Electronic Benefits Transfer (EBT) card or a Benefits Identification Card (BIC) without having to visit an office. One of the goals of the project was to provide Alameda County residents a similar level of experience they would expect using a physical kiosk at an ACSSA office but with the convenience of accessing the kiosk's services remotely from their computer or smart device.

ACSSA assists approximately 475,000 individuals, or one in four Alameda County residents. The Virtual Kiosk is designed to assist all of these individuals as it accepts documents for all assistance programs and can replace benefit cards for food, cash, and medical assistance.



The Virtual Kiosk is accessible to the public anywhere from any device and the information provided is 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 ACSSA to keep track of any documents submitted or requests for replacement benefits cards safely and securely.

The Virtual Kiosk was launched at the beginning of January 2022. Despite the lack of big promotion, ACSSA has observed a steady increase in the number of documents submitted and



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replacement benefits cards requested per month while keeping the community safe by enabling access to essential services remotely. In January 2022, 394 documents and 49 replacement benefit card requests were received through the Virtual Kiosk. These numbers increased to 755 documents and 55 replacement benefit card requests in February 2022, showing a growing trend of usage.

The Virtual Kiosk was designed to provide Alameda County residents with a more convenient method of submitting documents and/or requesting replacement benefit cards. While the physical kiosk was used most often for in-person visits, Alameda County was able to quickly replicate the kiosk to an online service, available anytime, anywhere. While the County and its residents rebound from the pandemic, the Virtual Kiosk will continue to grow and expand access to essential services while keeping the community safe by minimizing the need for in-person visits, even after the pandemic is over.

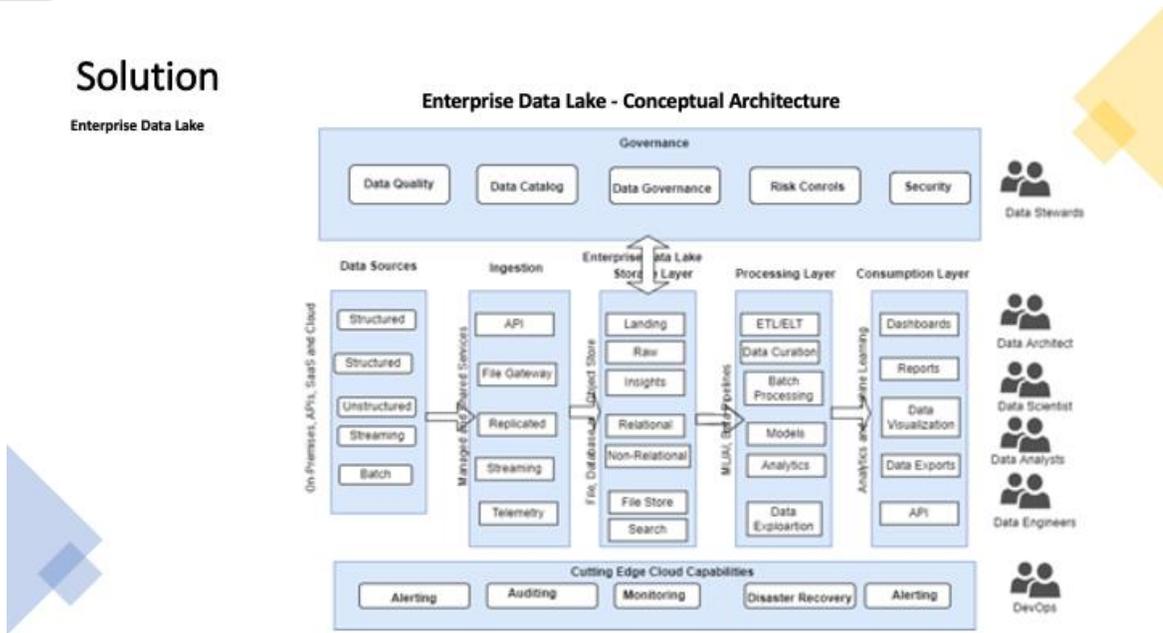
## **14. SHIE DEPOT – DATA LAKE**

Alameda County established a multi-sectoral data aggregation repository, named Social Health Information Exchange (SHIE), as part of California’s Whole Person Care program. To enable decision-making for cross-sector care coordination for the underserved communities and provide a separate analytics environment, HCSA partnered with ITD to build a data lake in Microsoft Azure using an Enterprise Master Person Index tool to link data sets. This provided population health management and care coordination in a multi-sectoral way. During the COVID-19 pandemic, this program identified vaccination targets and delivered care equitably to underserved communities including the homeless population. Data coming from various sources in different formats generated the need for accuracy and reliability. This resulted in an innovative patient data matching project which used a technology called “Referential Matching.” Having a robust data lake environment with data from seven different health care and social sectors is not only innovative but could potentially act as a model for other counties.



## Solution

Enterprise Data Lake



SHIE Depot is an evolving program. With over 627 million rows of data, the database has grown from 100 Gb to 600 Gb and is expected to grow to 1.5 TB in just under few years. While it has been able to meet various urgent requirements of HCSA it is still not at its full potential. Using SHIE Depot HCSA has been able to meet various care coordination demands. Some results and/or successes include but are not limited to:

- Using analytics powered by SHIE Depot it was possible for the HCSA program team to measure the effectiveness of the FEMA-funded hotel programs used to house HMIS clients who are vulnerable to contract COVID-19.
- HCSA and other CBOs can track who among their clients/patients are not fully vaccinated and boosted so that outreach could be made.
- HCSA can measure where the clients are going after exiting their hotel-based shelters to determine if they continue to remain vulnerable and report to funders accordingly (State of California and FEMA).
- HCSA can identify which homeless clients are active enrollees of the Ryan White HIV program so that their housing placement priorities could be bumped up.
- HCSA is also planning to use SHIE Depot to find out prior clinical touchpoints for the justice-involved population currently held in the County jail. By gaining this insight County's



probation department may be able to plan care coordination for this population upon re-entry into their own communities.

- HCSA is using SHIE Deport to know which of their homeless clients are enrolled in some specific housing services, known as Community Support services under the CalAIM program of the State, are members of the managed care plans of the County. Upon knowing their health plan enrollment status, HCSA can convert the housing services into electronic claims or encounter messages to get paid from the managed care plans under CalAIM. This is expected to boost Alameda County’s revenue and will help the State’s core objective of coordinating whole-person care of Medi-Cal enrollees via managed care health plans.

## 15. FPPC EFORM 700

Year	Statement Type	Agency Name	Division Name	Pending	Submitted	Reviewed	Request Amendment	Total	% Pending	% Submitted	% Request Amendment
2021	Annual	AC Test Agency		3	6	0	1	10	30.00	70.00	10.00
2021	Annual	AC Test Agency	Test	1	1	0	0	2	50.00	50.00	0.00
2021	Assuming	AC Test Agency		2	5	0	1	8	25.00	75.00	12.50
2021	Assuming	AC Test Agency	Test	0	2	0	0	2	0.00	100.00	0.00
2021	Leaving	AC Test Agency		4	3	2	1	10	40.00	60.00	10.00

Every elected official and public employee who makes or influences governmental decisions is required to submit a Statement of Economic Interest, also known as Form 700 which requires public officials to disclose assets and income which may be materially affected by their official actions. Once filed, the form is a public document and must be made available to the public upon request.

In the past, Alameda County’s Form 700 Filing Officials maintained filer information in an excel spreadsheet. They had to maintain the email distribution list and manually send email reminders to the filers. The filers received the email, printed out the forms, filled out, signed, and handed



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them to their agency/department's Filing Officials. Due to the manual process and the lack of a centralized system, it was difficult to keep track of all filers and overdue statements. To address this issue, the Alameda County Clerk of the Board partnered with ITD to develop a modern online filing system that allows filers to electronically review and submit their statements.

The system is innovative as it allows the filers to automate submission, reuse previous submissions, and provide a sustainable alternative to an expensive paper tracking process. The system was rolled out County-Wide in February 2021 and in January 2022 was rolled out to the School Districts, Boards and Commissions, and local agencies increasing the filers from 1000 to 3000. The eForm700 Filing System helped Alameda County eliminate the need for printed paper and wet signatures. The system supports the County's Virtual First Service Delivery Guidance approved by the Board of Supervisors in November 2020.

The eForm700 Filing System has been approved for use by the Fair Political Practices Commission (FPPC) and has expedited the annual approvals by enabling departmental filing officers to track compliance, send email reminders and conduct required reviews timely.

## **16. ACHIRE**

As part of the system modernization and process improvements initiative, ITD redeveloped the legacy ACHire system for Social Service Agency (SSA) using modern technology. This system creates employment opportunities for SSA recipients whose income is below 200% of the Federal Poverty level and is used by Community Business Partners and the SSA staff. The application identifies SSA recipients as potential employees and facilitates timesheet reporting and streamlines reimbursement to employers.

SSA collaborated with ITD and external business partners to identify, prioritize, and develop the web application using ITD's technology stack to eliminate siloed infrastructure and operational support.

The solution was innovative as it was created as a one-click system. The SSA program specialist identified redundant forms enabling consolidation and streamlining of the business process and



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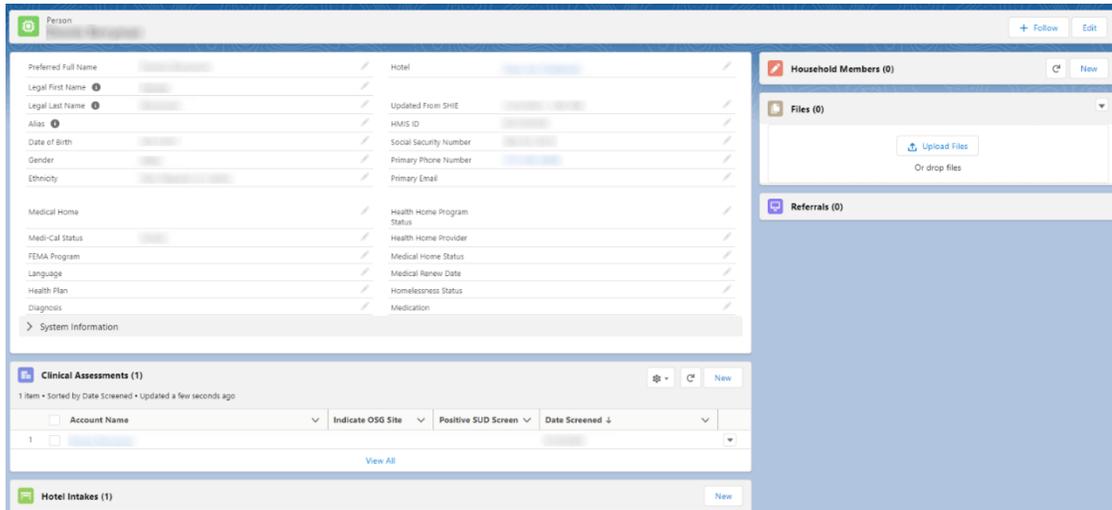
eliminating the number of clicks needed to complete the same task. The technology allowed for a modern framework to provide an easy way in a single location to adjust the look and feel of the web components throughout the entire web application. The new web application enabled self-service options for Community Based Organizations to securely upload timesheets and reset passwords, eliminating the need to contact an SSA staff member.

The application leverages web services that integrate with ITD's virus scanning technology and scans the documents before they are uploaded to the network for processing. As a result, CBOs were able to upload timesheets to the application securely.

The launch in September 2021 resulted in an improved user experience. Additional features streamlined SSA's critical business processes and continued to expand employment opportunities for the difficult to employ. Since the launch of ACHire, a total of 659 SSA recipients were employed by 191 Community-Based Organizations, paying out a total of \$4,233,600 in subsidies.

## **17. COVID HOTEL – PROJECT ROOMKEY**

Low Code was key to being nimble and helping those in need. Innovative Applications like Clinical Assessment, Hotel Referral Intake, Street Health app, Encampment project, and Homefinder were built using Salesforce Low code technology in 2021 as part of the Project Roomkey initiative. These applications collectively served 2500+ people in the homeless community by managing isolation and quarantine locations for people who are COVID+ or exposed, by providing safe shelter for people who are at high risk for complications from the disease, and by finding permanent housing for 1000+ homeless people. Over time, these applications automated the intake and assessment process and collected homeless patient data from multiple sources which were incomplete, incorrect, and contained out-of-date demographic data. An innovative data matching project was developed which reinvented patient matching.



Inaccurate patient matching is one of the greatest obstacles to interoperability, information exchange, value-based care, and innovation. ITD partnered with HCSA and Verato, a healthcare technology solutions partner, to utilize powerful new patient matching technology called “Referential Matching.” Rather than directly comparing the demographic data from two patient records to see if they match, the application instead matched that demographic data to Verato’s comprehensive and continuously updated reference database of identities. This allowed the county to make matches that conventional patient matching technologies could never make.

This data matching later expanded to a larger Healthcare patient list including COVID patients and SHIE records with 600 million+ rows of data. For this project, ITD partnered with several departments, local agencies, and medical personnel. This project aligns with the county’s 10x vision to eliminate homelessness and improve outcomes for people experiencing homelessness by tracking homeless people, addressing long-standing health needs, and finding housing for those exiting the program at a rate nearly double of traditional congregate shelters.

## 18. ASSESSMENT APPEALS MODERNIZATION

Alameda County’s Clerk of the Board division and the Assessor’s Office currently oversees the Assessment Appeal process. Assessment Appeal provides an opportunity for property owners to inquire and request adjustments to their property assessment. To manage and process the assessment appeals, the Clerk of the Board and the Assessor relied on an outdated PowerBuilder system developed in the mid-1980s. Due to the outdated technology, this system



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could not be enhanced to keep up with new requirements. To modernize this system, the Clerk of the Board and the Assessor's Office partnered with the Information Technology Department (ITD) to redesign the business process and develop a new system using modern technologies.

The Assessment Appeal System was built in phases between 2019 and 2021. With the volume of assessment appeals ranging from 2,000 to 5,000 per year, this collaborative redesign resulted in a significant increase in productivity and process improvements.

The screenshot shows a web application interface for creating a new appeal. At the top is a navigation bar with the 'AAB' logo and menu items: Home, Search, Appeal, Agents, Log Fee, Search Fee, Hearings, Create Agenda, Agenda, Minutes, Findings, Letters, Reports, Tracking, Improve, and Run Sync. The main heading is 'Create New Appeal' with a 'Close Window' button. Below the heading are input fields for 'Appeal Year' (2020) and 'Appeal Number' (8888). Action buttons include 'Save Appeal', 'Bifurcate', and 'Copy Applicant and Agent Info'. The 'Appeal Info' section contains fields for Roll Year, Parcel No, Filed Date, Hearing Officer (Yes), Send Electronic Postcard (checked), Assessee No, Appeal Type (Please Select), and Finding of Facts (No). The 'Applicant Info' section includes fields for Last Name, First Name, Company, Address, Address Line 2, City, State (CA), Zip Code, Is International, Main Phone, Work Phone, Fax, and Email. The 'Agent Info' section includes fields for Agent Number, Last Name, First Name, Company, Old Company, Address, Address Line 2, City, State (CA), Zip Code, Is International, Phone, Fax, and Email.

This system allowed for the applicant to track and manage applications as well as participate in virtual hearings. Instant reports saved time and resources previously needed to conduct lengthy research. With all information just a click away the new system has made the complex appeals process easy to manage.

This project helped the County to reduce the workload on staff, improved the quality of data in the system, reduced paper usage, and ultimately improved the experience for taxpayers applying for Assessment Appeals.



Clerk of the Board and Assessor staff are now able to ask for new features/enhancements required to keep up with new legislation and changes in the county's strategy in handling the Assessment Appeals.

## 19. VIRTUAL FILING OF PROPERTY DOCUMENTS AND FORMS

Document Type	Event Date
MISC	12/22/2020 00:00
MISC	12/21/2020 00:00
BUILDING SHEET	12/18/2020 00:00
QUESTIONNAIRE	12/18/2020 00:00
MISC	12/18/2020 00:00
MISC	12/18/2020 00:00
MISC	12/17/2020 00:00
AAB	12/12/2020 00:00
NC EXCLUSION	12/16/2019 00:00
BUILDING SHEET	01/01/2017 00:00
APPRAISAL RECORD	
MISC	

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.

## 20. 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.



## 21. REFUND TRACKING PORTAL



County of Alameda

# Information Technology Department

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.



## Refund Status Lookup

Refund Lookup Detail

Parcel/Account: 00-358063-00-000-17-00- Property Address: 388 9TH ST # 183  
01 94607-4292

Refund Status	Warrant No	Refund Amount	Claimant/Payee	Roll Year	Refund Type
Warrant Cashed (05/21/2018)	2947808	\$444.15	HOLY GROUND CHURCH THEOLOGICAL SEMINARY	2017/18	Unsecured Refunds

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.

## 22. VIRTUAL BOARD MEETINGS



County of Alameda

# Information Technology Department

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.



## 23. COVID-19 SELF-SCREENING ASSESSMENT

**COVID-19 SELF-SCREENING ASSESSMENT**

You must answer the following questions at the start of your work shift upon arrival to the workplace every day you are scheduled to work. If any answers change while you are at work, immediately notify your immediate supervisor by phone, e-mail, or personally making sure to adhere to safe social distancing (6 feet away) and leave the workplace.

version: rev7/21/20

\* Required

1. Name \*

Enter your answer

2. County Email \*

Enter your answer

3. Department \*

Select your answer

4. Supervisor Name \*

Enter your answer

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.

## 24. COVID-19 CHATBOT

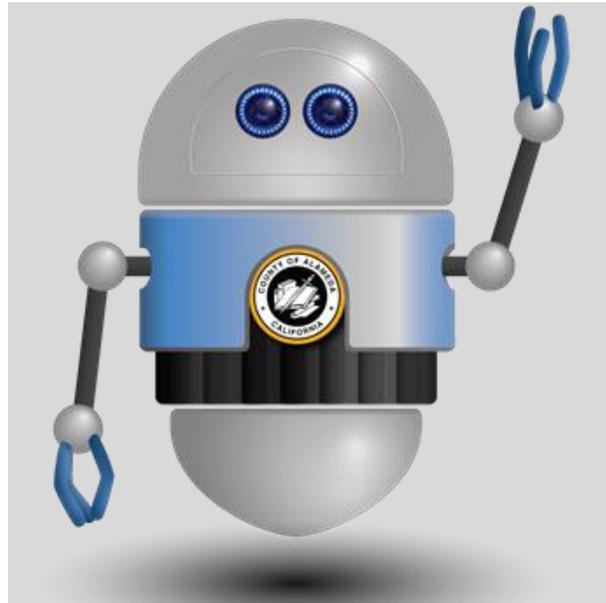


County of Alameda

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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 8<sup>th</sup> 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.

## 25. FAMILY VISITS FOR JUVENILES



County of Alameda

# Information Technology Department



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.

## 26. 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.



## 27. 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



County of Alameda

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## 28. 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.



## 29. SSA AC GREAT PLATES DELIVERED

**Alameda County Great Plates Delivered**  
Intake Form for Adults age 60 and older

The Alameda County Social Services Agency is pleased to offer nutritional meals to eligible older adults impacted by the COVID-19 pandemic through the Great Plates Delivered Program (GPD). We encourage all eligible County residents (except or the City of Oakland) to take full advantage of this nutritional food resource by completing the below registration form.

His food delivery program is designed to provide meals to Alameda County adults age 65 and older and adults age 60-64 who are at high-risk, as defined by the CDC and who are unable to access meals while staying at home and are ineligible for other nutrition programs. Please note that this program is subject to a limited time period and available funding under the state or local Shelter In Place Order. Individuals residing in Oakland will be referred to the City of Oakland Great Plates program.

Applicant Information	
First Name *	Last Name *
First name	Last name
Street Address *	Unit
1234 Main St	Apartment, studio, or floor
City *	State *
	Zip *
Home/Cell Phone *	Preferred Language
Contact/Caregiver	Contact/Caregiver Phone
Full Name	
Additional Information	
Do you live alone? *	
<input type="radio"/> Yes <input type="radio"/> No	
What is your age? *	
Date of Birth *	

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.

## 30. 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

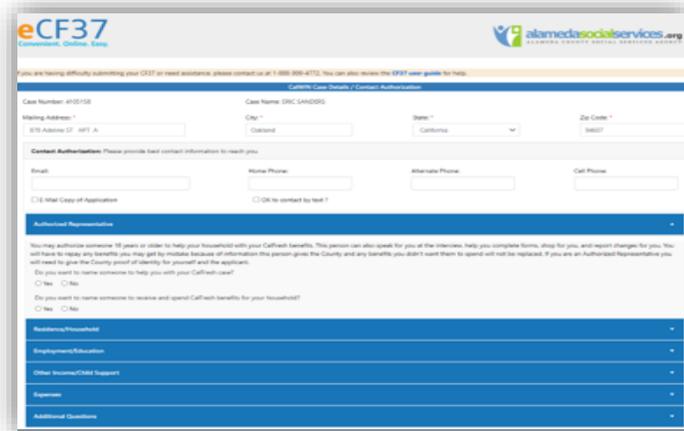


# County of Alameda Information Technology Department

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



County of Alameda

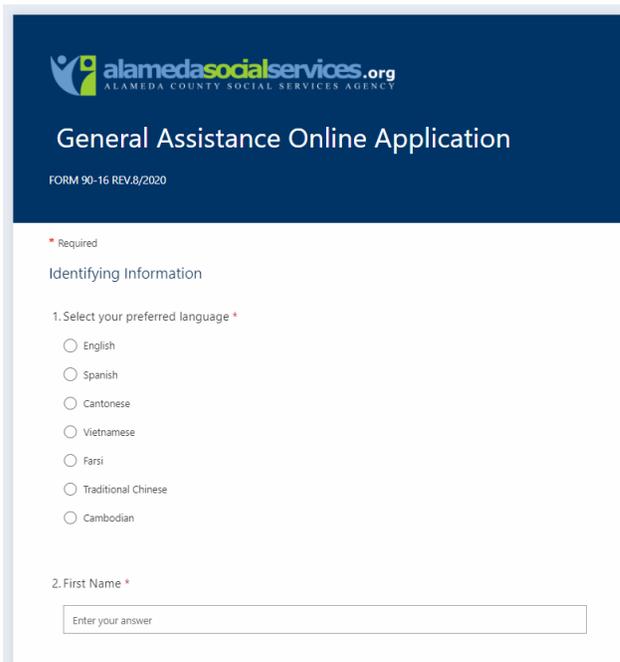
# Information Technology Department

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.

### 31. 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



County of Alameda

# Information Technology Department

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.

## 32. 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.

**Alameda County  
Office of the Treasurer  
and Tax Collector**

Levy, Treasurer-Tax Collector  
R IMMEDIATE RELEASE  
ril 13, 2020

Julie P. Manaois, Chief Dep  
Contact: Henry “  
Treasurer-  
E-mail: [ttaxpublicmai](mailto:ttaxpublicmai)

### Alameda County Treasurer-Tax Collector Announces Policies and P or COVID-19 Related Delinquent Property Tax Penalty & Interest

nry C Levy, the Alameda County Treasurer-Tax Collector (ALCO TTC), has released a polic payers impacted by the COVID-19 Shelter-In-Place Orders and were unable to timely pa onnd installment of property taxes by the April 10<sup>th</sup> deadline.

policy and instructions, as well as the application form, are now on the TTC website at [ps://treasurer.acgov.org](https://treasurer.acgov.org).

ALCO TTC will consider applications for waivers of penalties, interest, and costs for deli he reason for delinquent payment is due to demonstrated COVID-19 related circumstan lth or financial hardship to the taxpayer, and that the failure to pay was due to circumst /ond the taxpayer’s control.

payers must have paid their first installment; all taxpayers will be required to provide mentation of the COVID-19 related reason. Examples of such documentation are in th ind online. Taxpayers will be required to sign under penalty of perjury. The ALCO TTC wi ew waiver penalty requests on a case-by-case basis, beginning on Monday, April 13<sup>th</sup>. T ist make full payment of their taxes before the application for waiver will be reviewed.