

ALAMEDA COUNTY VIRTUAL FIRST

March - 2022

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. 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 for 2021 – 2022 are listed in the document below:

1. SSA VIRTUAL KIOSKS



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

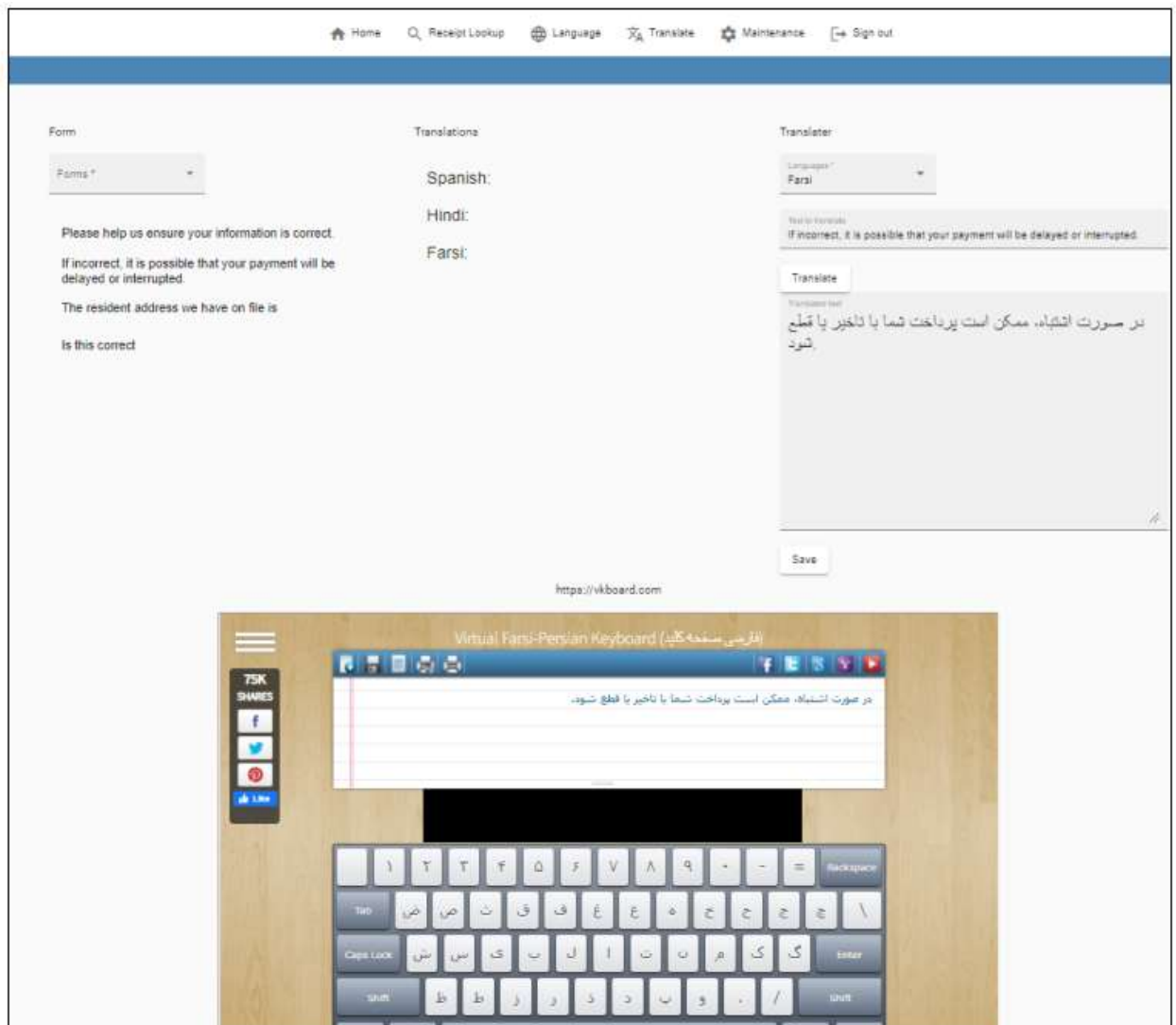


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replacement Electronic Benefits Transfer (EBT) card or a Benefits Identification Card (BIC) without having to visit an office. One of the goals of the project was to provide Alameda County residents a similar level of experience they would expect using 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.





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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 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.

2. SHIE DEPOT

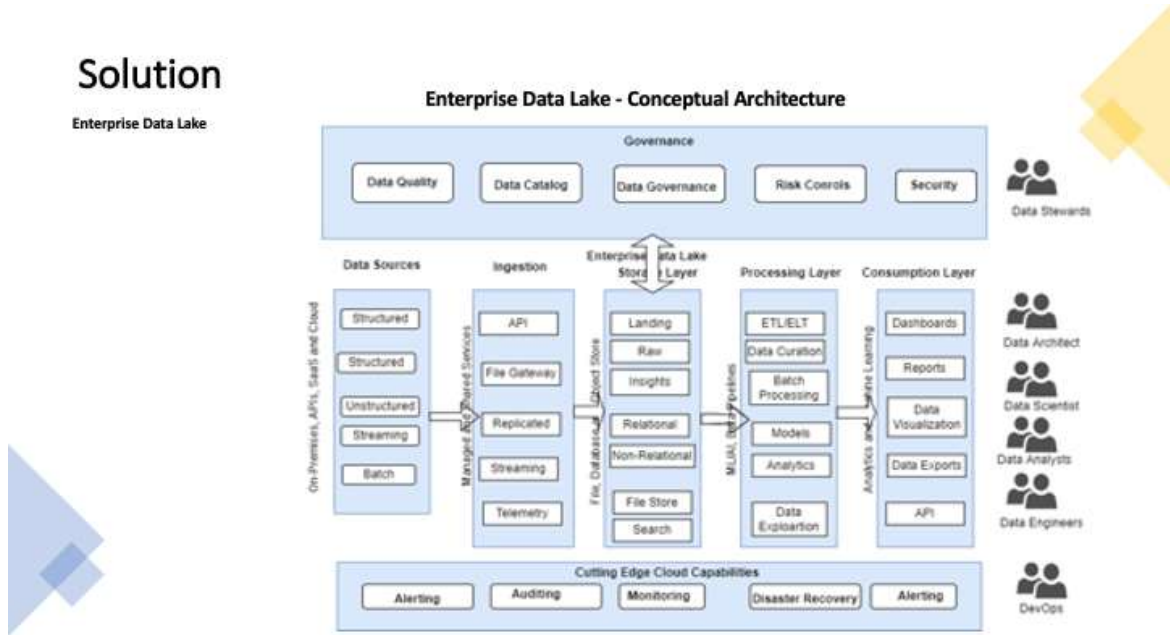
Alameda County established a multi-sectoral data aggregation repository, named Social Health Information Exchange (SHIE), as part of California's Whole Person Care program. To enable decision-making for cross-sector care coordination for the underserved communities and provide a separate analytics environment, 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 Depot 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.

3. 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



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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 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.

4. 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.



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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 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.

5. COVID HOTEL – PROJECT ROOMKEY

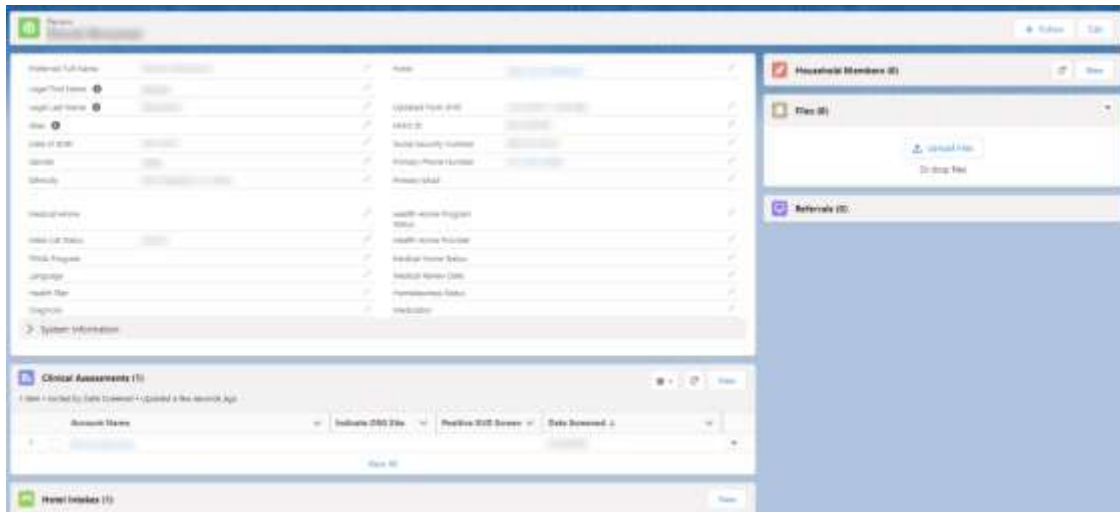
Low Code was key to being nimble and helping those in need. Innovative Applications like Clinical Assessment, Hotel Referral Intake, Street Health app, Encampment project, and Homefinder were built using Salesforce Low code technology in 2021 as part of the Project Roomkey initiative. These applications 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



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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.

6. 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



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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 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, there is a navigation bar with the 'AAB' logo and various 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 on the right. Below the heading, there are input fields for 'Appeal Year' (set to 2020) and 'Appeal Number' (set to 8888). There are three buttons: 'Save Appeal', 'Calculate', and 'Copy Applicant and Agent Info'. The form is divided into three main sections: 'Appeal Info', 'Applicant Info', and 'Agent Info'. The 'Appeal Info' section includes fields for 'Roll Year', 'Parcel No.', 'Filed Date', 'Hearing Officer' (set to Yes), 'Send Electronic Postcard' (checked, with a note 'If Checked it will send Postcard Email'), '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' (checkbox), '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' (checkbox), 'Phone', 'Fax', and 'Email'.

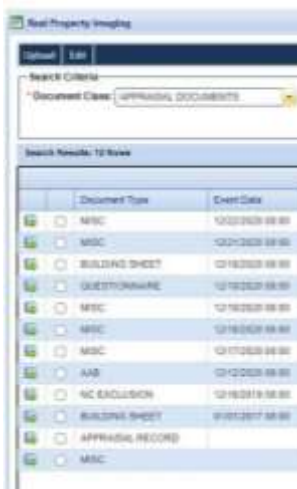
This system allowed for the applicant to track and manage applications as well as participate in virtual hearings. Instant reports saved time and resources previously needed to conduct lengthy research. With all information just a click away the new system has made the complex appeals process easy to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

7. 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.

8. 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.





9. 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.



10. 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.



11. COVID-19 SELF-SCREENING ASSESSMENT

A screenshot of a web-based COVID-19 self-screening assessment form. The header is dark red with the text 'COVID-19 SELF-SCREENING ASSESSMENT' and a small circular logo. Below the header, there is a paragraph of instructions. The form contains several input fields, including '1. Name', '2. County Email', '3. Department', and '4. Supervisor Name', each with a 'First Name' and 'Last Name' sub-label and a text input box.

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.



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12. 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.



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13. 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.

14. 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.



15. 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



16. 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.



17. 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.

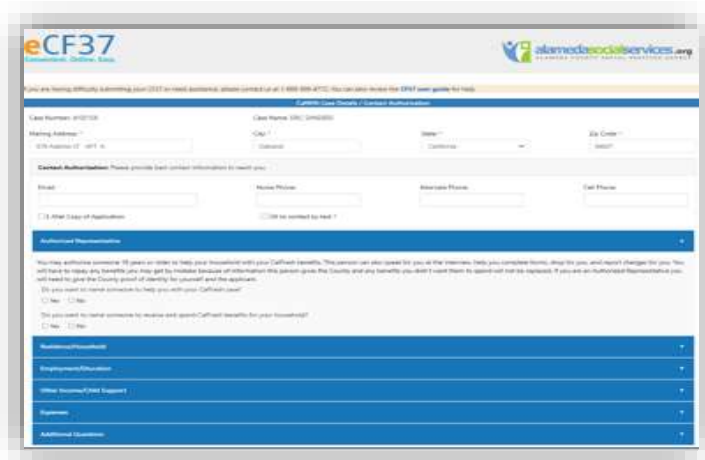
18. SSA ECF37 – RECERTIFICATION

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



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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



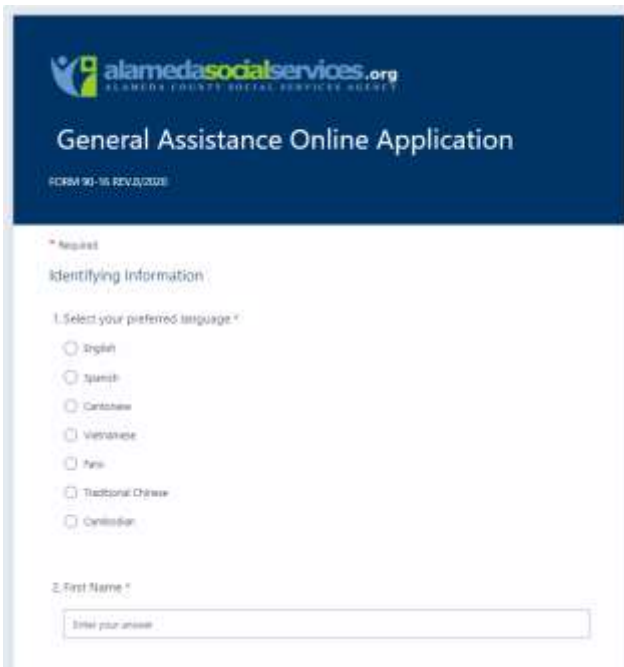
consumer feedback on the use of the system. The feedback has been tremendously positive with users often reporting that they would use the application again and recommend it to others. Due to the pandemic, most businesses are prioritizing the ‘Virtual First’ approach. With this online recertification 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.

19. 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



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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.

20. 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.

