



California
DEPARTMENT OF TECHNOLOGY



DIGITAL WEB SERVICES NETWORK

DWSN Quarterly Forum
Thursday, April 22, 2021

webstandards.ca.gov



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DEPARTMENT OF TECHNOLOGY



Opening Remarks

Blaine Wasykiw

California Department of Technology

webstandards.ca.gov



Agenda

- Lucidchart: Whiteboarding Collaboration Tool
- Content Design Process and Collaboration Tools (Part 2)
- Working in cross functional teams
- Accessibility – State Template Update
- Open Discussion and Q/A
- Suggested Future DWSN Topics
- Closing Remarks



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Lucidchart: Whiteboarding Collaboration Tool

Isaac Cabrera

*Office of Enterprise Technology
California Department of Technology*

webstandards.ca.gov



The Vision

Implement a tool that allows CDT COVID-19 staff to rapidly collaborate by sharing ideas and project goals. This tool would facilitate:

- *Brainstorming / Braindumps*
- *Technical system diagrams*
- *Project / Task tracking*
- *Documentation of data pipelines*



The Challenges

- *Many people using different systems*
 - *Visio, Muro, Lucid, MS Paint, etc.*
- *A mechanism for creating authoritative documents and disseminating / sharing updates*
- *A solution to replace the whiteboard experience of the office*



Distilling team requirements

Met with each CDT team and review

- *Current products in use*
- *Supported / Required functions*
- *What more they want from what they are currently using*



Content Design Process and Collaboration Tools (Part 2)



Koji Kumpulainen

*Office of Enterprise Technology
California Department of Technology*

webstandards.ca.gov



Topics to Discuss

1. What is content design
2. Why content design
3. Content design tips and tricks



What is content design

- Words:
 - Imagery
 - Links
 - Charts
 - Steppers
 - Documents or excel spreadsheets
 - Many, many, other components.
- “When your job is to decide which one of those, or which combination of several of them, meets the user’s need – that’s content design” – Sarah Richards



Why content design

We once worked on a page...

Withholding Requirements for Sale of California Real Estate

Real estate withholding is a prepayment of income (or franchise) tax due from [sellers](#) or [transferors](#) on the gain from the sale of California real property. It is not an additional tax on the sale of real estate.

Withholding is required by the [buyer](#); however, the withholding may be performed by the real estate escrow person ([REEP](#)) on the buyer's behalf.

Real estate withholding is required whenever there is a transfer of title on California real property. Examples are:

- Sales or transfers of real property (including exchanges and gifts).
- Leaseholds/options.
- Short sales.
- Easements.
- Personal property sold with real property (if not stated separately).
- Deferred exchanges.
- Vacant land.

Installment Sales

An installment sale is a sale of California property in which the seller or transferor receives at least one payment after the tax year in which the sale occurs.



The page kept going...

Withholding requirements

For each real estate transaction, a buyer or transferee must withhold on:

- The principal portion received in escrow (excluding interest).
- Each installment payment (principal only).

We do not require withholding:

- On interest that accrues on the installment payments.
- If other exemptions apply, see Form 593-C, Real Estate Withholding Certificate.

Withholding payments are due to us by the 20th day of the following month the buyer or transferee makes an installment payment. They may choose to mail withholding payments to us monthly, quarterly, or annually provided that they send their payment to us by the first installment due date during that calendar year (see examples in payment options section).

Withholding calculation options

You may choose to calculate the withholding amount using the **Total Sales Price Method** or the **Optional Gain on Sale Election** method, also known as the **Alternative Withholding Calculation Method**.

Total Sales Price Method

If no exemptions apply, use this method to withhold 3 1/3 percent on each installment payment's principal portion (exclude interest).

To calculate the withholding, complete the following:

Enter the installment payment amount (pWhy content design _____) x 3 1/3% = \$_____.

If you do not know the installment payment amount, use the instructions in the table below to determine the amount to insert in the installment payment formula above.

If you are withholding on...	The down payment in escrow.
Then, enter the...	Down payment (subtract the promissory note amount from the sales price).
If you are withholding on...	An installment payment following the close of the real estate transaction.
Then, enter the...	Principal portion of the payment.



And going...



If you are withholding on...	The final payoff amount in escrow.
Then, enter the...	Remaining principal required for payoff.

Enter withholding amount due and reportable on Form 593, **line 5**, and Amount of payment on the Form 593-V voucher.

Example 1: Down Payment (or initial payment) due during escrow

If you know the down payment amount, complete the equation as follows:

Down payment amount...\$100,000
Multiply by 3 1/3%..... x .0333
Withholding amount.....\$3,330

If you don't know the down payment amount, compute it as follows:

Seller or transferor sold property for a total sales price of \$300,000 and wrote a \$200,000 promissory note.

To calculate the down payment amount, subtract the promissory note from the sales price:

Total sales price.....\$300,000
Promissory note.....(\$200,000)
Down payment amount.....\$100,000

Enter the down payment amount into the original calculation to compute the withholding amount due:

Down payment amount...\$100,000
Multiply by 3 1/3%..... x .0333
Withholding amount.....\$3,330

Enter \$3,330 as the amount withheld on Form 593, **line 5**.

Example 2: Installment payments following the close of the real estate transaction

The seller or transferor sold a property with monthly installment payments of \$2,000 (principal only). Using the information provided, we chose to apply the total sales price method to determine the withholding amount due.



Continued 1/2



In the table above, we are "withholding on an installment payment following the close of the real estate transaction," so we need the "principal portion of the payment" or \$2,000 for the calculation.

Monthly principal installment payment...	\$2,000
Multiply by 3 1/3%.....	x .0333
Withholding amount.....	\$66.66 (rounded to \$67)

Enter \$67 as the amount withheld on Form 593, **line 5**.

Example 3: The final payoff amount in escrow

The seller or transferor is making the final payoff payment of \$2,500. The \$2,500 consists of \$2,100 principal and \$400 interest. Using the information provided, we determined the amount due by applying the total sales price method.

Final escrow payment.....	\$2,500
Less interest.....	(\$400)
Final principal payment....	\$2,100

Final principal payment.....	\$2,100
Multiply by 3 1/3%.....	x .0333
Withholding amount.....	\$69.93 (rounded to \$70)

Optional Gain on Sale Election Method (Alternative Withholding Method)

Apply this method to calculate the withholding amount using the maximum tax rate that applies. To complete the calculation, you will need the withholding rate, monthly principal payment amount, and the Installment Withholding Percent.

Example 1: Subsequent payments after escrow

Withholding rate:	12.3%
Monthly principal payment:	\$1,500
Installment Withholding Percent:	25%



Continued 2/2



Example 2: Subsequent payments after escrow when the installment withholding percent is unknown

Property sold for \$700,000
 Estimated gain of \$350,000
 Withholding rate of 12.3%
 Monthly principal payments of \$1,500
 Installment withholding percent: Unknown

To determine the installment withholding percent, you can either find it on Form 593-I, Part II, or calculate it as follows:

Estimated gain on sale (also from Form 593-E, **line 16**).....\$350,000
 Selling price (also from Form 593 E, **line 1**)..... + \$700,000
 Installment sale withholding decimal = .500

To convert decimal to percent, calculate as follows:
 Insert installment withholding decimal..... .500
 Multiply by 100..... x 100
 Installment Withholding Percent..... = 50%

To compute the installment sales amount requiring withholding, calculate as follows:

Principal portion of installment payment.....\$1,500
 Multiply by Installment Withholding Percent (also from Form 593-I)..... x 50%
 Installment sale amount requiring withholding..... = \$750

Then, to compute the total withholding amount due as the amount withheld, calculate as follows:

Installment sale amount requiring withholding.....\$750
 Multiply by Maximum Tax Rate based on entity type..... x 12.3%
 Total withholding amount due..... \$92.25 (rounded to \$92)

Round \$92.25 to \$92 and enter 92 as the amount withheld on Form 593, **line 5**.

Payment Options

That's not even half the page so far.



Before content design



- Grade 8 (not bad!)
- Words: 2264
- 12 uses of passive voice
- 26 phrases with simpler alternatives
- 21 of 196 sentences are hard to read
- 22 sentences are VERY hard to read



After content design



home / pay / withholding / real estate withholding

Real estate withholding

< Pay

Withholding

Adjust your wage withholding

Income tax for nonresidents

Withholding on payments to nonresidents

Backup withholding

Real estate withholding

Real estate withholding is a prepayment of income tax due from the selling of California land or anything on it (real property).

Examples of real property:

- Vacant land
- Buildings
- Homes

Withholding is required on sales or transfers of:

- Real property (including exchanges).
- Interest in land owned by someone else (Easements).

Exchange of real property

When you trade real property for another real property, this is considered an exchange.

Failed exchange

Your exchange can fail for many reasons, refer to [Internal Revenue Code Section 1031](#).

Boot

When you trade property and receive other property (cash), its "boot". Withholding is required on boot over \$1,500.

Exemptions

You do not have to withhold tax if the CA real property is:

- \$100,000 or less
- In foreclosure
- Seller is a bank acting as a trustee
- See Form 593-C for complete list of exemptions.

To file your exemption, submit [Form 593-C](#) to your escrow agent before closing.

Withholding when a trust is on a title

Real estate withholding is required on the sale of CA real property held by a trust unless the trust can qualify for an exemption on Form 593-C.

There are two types of trusts; a grantor and a non-grantor trust.

Grantor trust

A grantor is the person who created the trust and controls the trust assets.

The grantor reports the real estate sale and claims the withholding on their tax return.

Unless the grantor qualifies for an exemption, complete Form 593 using the grantor's information.

Non-grantor trust

A non-grantor trust is an entity separate from the grantor for all tax purposes. Unless the non-grantor trust qualifies for an exemption, complete Form 593 using the name of the trust and its FEIN.

i Do not use the trustee's information.



After content design readability

- After content design
 - Grade 5
 - 292 words (reduced by 87%)
 - 4 uses of passive voice
 - 0 phrases have simple alternatives
 - 5 of 36 sentences are hard to read
 - 0 sentences are VERY hard to read



Well designed content

- Meets users' needs
- Makes your website easier to understand and use
- Is more accessible



Tips and tricks



Use plain language



- 5th – 8th grade reading level
- Test using “Hemingway” or enable “Show readability statistics” in Microsoft Word.



Avoid jargon



- Even if the audience are experts, they still prefer an easier read.
- Use Google Trends to see what people are searching for.



Use active voice (with zombies)

- Active voice is clearer, and often less words than passive voice
- If you add “with zombies” after the verb, and it makes sense, your sentence is passive.
 - Passive: Twenty-seven boxes of files were filed in record time (by zombies).
 - Active: Staff filed 27 boxes in record time.



Be concise



- #10 of Dieter Ram's principles of good design:
 - “Good design is as little design as possible”



Write together



- The editorial process is faster when content designers and a subject matter experts co-create content.
- When applicable, let specialties like Legal and Privacy in on the fun!



Get comfortable with content critique



- Critique is an essential part of the collaboration process to improve the user experience:
 1. Share content
 2. Get constructive feedback
 3. Consider alternatives
 4. Bounce around ideas
 5. Get support and advise, not criticism.



Get comfortable with content critique (cont.)

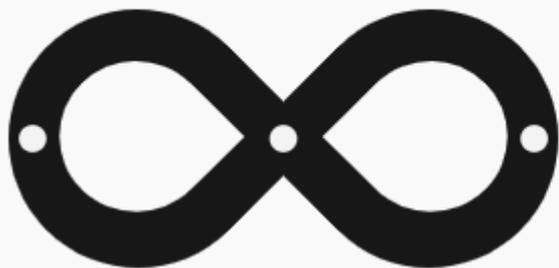


- Questions you might hear during a content crit:
 - What problem are we trying to solve?
 - Have you considered... [alternative]
 - Will the user understand [X]...
 - Tell me about the thought process behind [Y]...
 - Should we test [Z]...



Keep iterating

- You don't have to get it perfect the first time.



Observe

Immerse yourself in the real world.

Reflect

Come together and look within.

Make

Give concrete form to abstract ideas.



Resources



- [Hemingway App](#)
- [Get your document's readability and level statistics.](#)
- [Writing for GOV.UK](#)
- [18F Content Guide](#)
- [Content design by Sarah Richards](#)
- [IBM Design Thinking](#)



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Welcome
To the content design
party!

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Working in cross functional teams



Ashley Draper
Elisabeth Nobriga

California State - COVID Web Team

Working in Cross- Functional Teams

Solving Problems using Human-Centered Design

ASHLEY DRAPER & ELISABETH NOBRIGA

INTRODUCTION

01

Through human-centered design, multi-functional teams can more successfully collaborate and produce work products that respond to specific user needs.

Topic to discuss

02

- Values
- Team structure
- Work style
- Technical skills and tools
- Team roles
- Soft skills
- Q & A

OUR VALUES

03

We are passionate about bringing agile/lean, human-centered design design principles and equitable access to government services for all Californians.

TEAM STRUCTURE



04

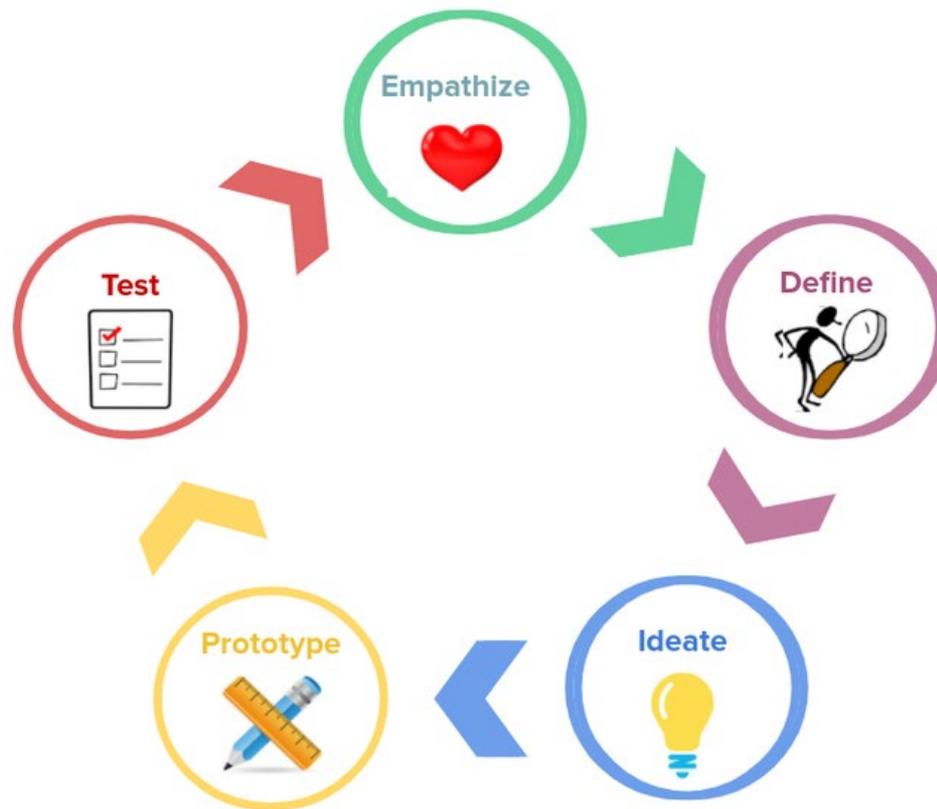
CHHS Office of Innovation comprised of various HHS department staff in a range of classifications that worked as a flat team without hierarchy.

Covid19.ca.gov comprise s both public employees and private contractors working together as a team without distinctions.

HOW WE WORK

05

Human-centered design

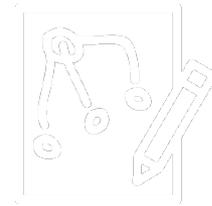


SKILLS AND TOOLS

06

1. DATA-
INFORMED
DECISION
MAKING

2. STAKEHOLDER
ENGAGEMENT



3. PROTOTYPING,
TESTING,
ITERATING

DATA-INFORMED DECISION MAKING

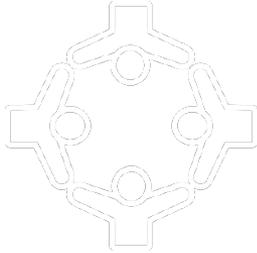


07

Utilizing various discovery tactics, we gain insights from the experts to tightly define the problem space.

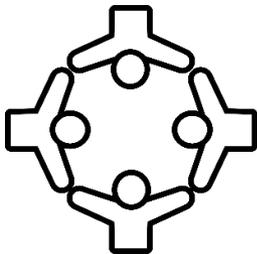
We collect and evaluate qualitative and quantitative data to identify and understand key pain points.

STAKEHOLDER ENGAGEMENT



For services to be fair, equitable and accessible for all, they must be designed that way.

Stakeholders at all levels of operation must be meaningfully engaged to help re-image processes and services.



PROTOTYPING, TESTING AND ITERATING



Avoid jumping to solutions prematurely and ensure the product works for everyone involved in the process

Iterate and improve content design by creating a continuous user feedback loop

TEAMS ROLES

10

- User experience researcher
- Designer
- Engineer/ developer
- Product lead
- Data analytics
- Content designer

SOFT SKILLS FOR TEAMS

11

- Foster psychological safety, empathy, and humility
- Embrace the "grey"
- Celebrate (appreciate the learning in) failures
- Set our own team norms, ground rules, and retros
- Leverage strengths of each teammate
- Opportunities for growth

IN SUMMARY

- Step out of our comfort zones
- Channel our passion for making things better for Californians
- Move the needle and get things done

13

BE THE CHANGE YOU WANT TO
SEE IN THE WORLD!

MAHATMA GANDHI



Accessibility State Template Update



Art Khomishen

*Office of Enterprise Technology
California Department of Technology*

webstandards.ca.gov

State Template Accessibility Release

Version 5.5.20 - accessibility updates and improvements

State Template v5.5.20 accessibility updates and improvements:

Level A Standards

- Fixed “Visible label and accessible name do not match” issue
- Fixed “Scrollable element is not keyboard accessible” issue
- Fixed "Hidden element has focusable content" issue
- Fixed “Container element is empty” issue
- Fixed “Form field is not labeled” issue

All release notes can be found on State Template GitHub release page: [Link](https://github.com/Office-of-Digital-Innovation/California-State-Template/releases/tag/v5.5.20)
<https://github.com/Office-of-Digital-Innovation/California-State-Template/releases/tag/v5.5.20>

State Template v5.5.20 accessibility updates and improvements (cont.):

Level AA Standards

- Fixed “Text is clipped when zoomed in” issue
- Fixed “Color contrast is not sufficient” issue
- Fixed “Text is clipped when resized” issue

Level AAA Standards

- Fixed “Line height is fixed” issue
- Fixed “line-height below minimum value” issue

State Template v5.5.20 accessibility updates and improvements (cont):

WAI-ARIA authoring practices:

- Fixed “State or property not supported” in main navigation
- Fixed “Text not included in an ARIA landmark” issue in the page sections such as hero banner

Accessibility best practices:

- Fixed “Headings are not structured” issue
- Fixed “Decorative element is exposed to assistive technologies” issue

State Template future updates and improvements based on WCAG 2.2 Requirements

Level AA Standards

- **Pointer Target Spacing** (all interactive elements needs to have an area with a width and height of at least 44 CSS pixels that includes it, and no other targets)
- **Focus Appearance minimum** (Change of contrast: The color change for the focus indication area has a contrast ratio of at least 3:1 with the colors of the unfocused state.)



Open Discussion and Q/A

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Suggested for
Future Topics

Blaine Wasykiw

California Department of Technology

webstandards.ca.gov



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Closing Remarks

Blaine Wasykiw

California Department of Technology

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THANK YOU

Post conference materials will be published on the DWSN website

For questions, please write to:

DigitalWebServicesNetwork@state.ca.gov