Client Portal - Demonstration
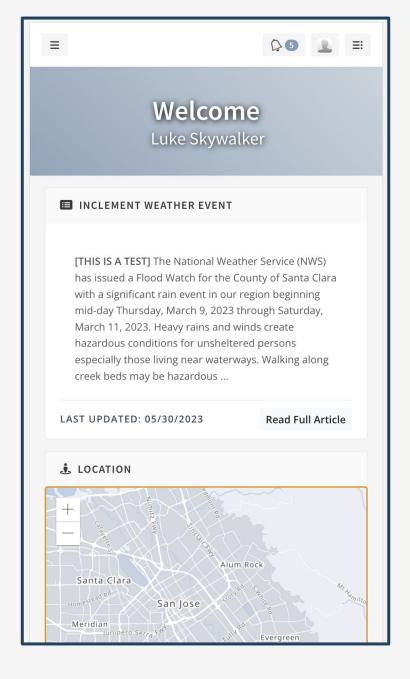
Bitfocus

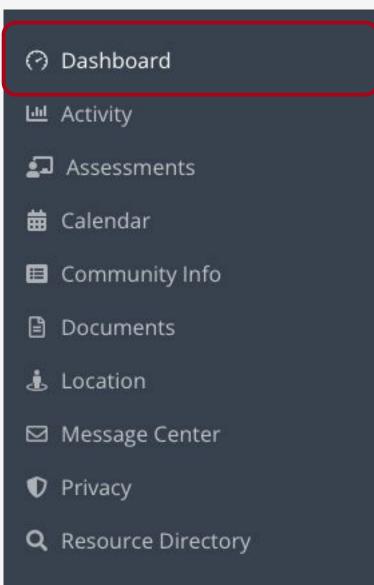# Santa Clara County's Customer Portal

✔ Client-facing HMIS access

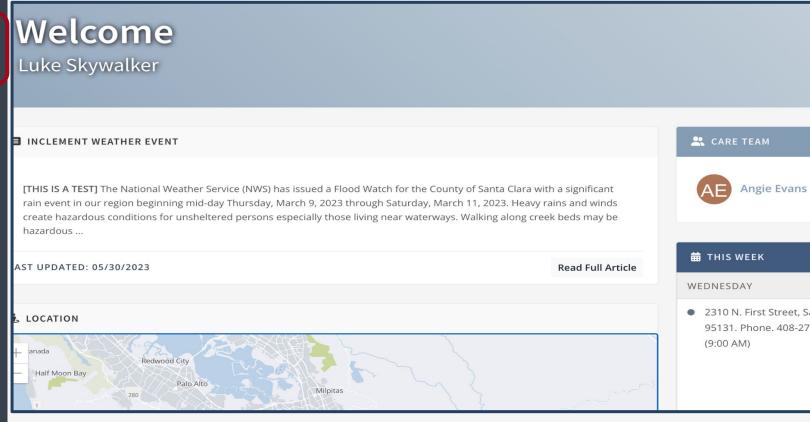✔ Available for desktop and mobile devices

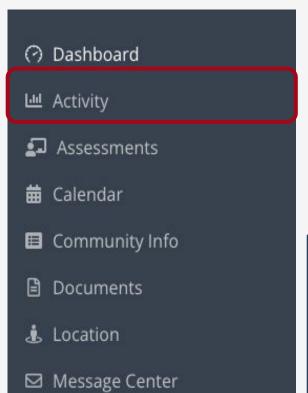Obamaphone
Mobile Preview

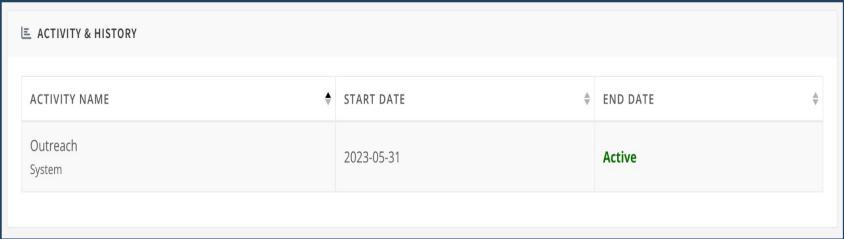18

Dashboard Functionality

- View most recent location

- View care team members

- View upcoming appointments

- View recent Community Info articles and recently updated Resources

Activity Functionality
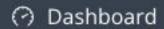
- View program enrollment history
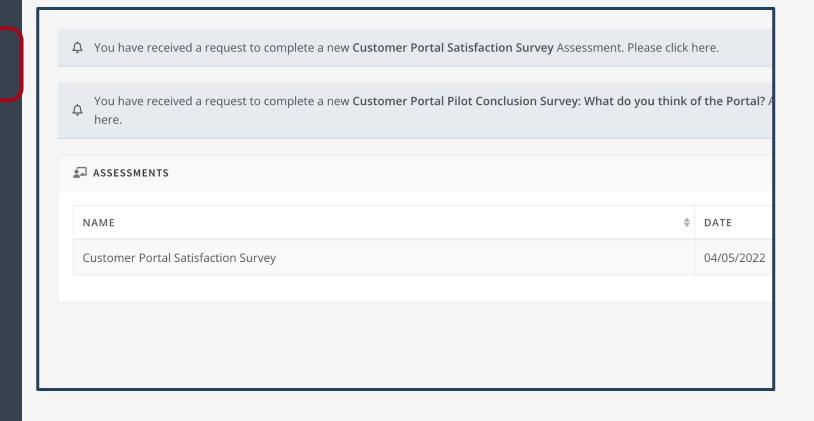
Dashboard

Activity

Assessments

Calendar

Community Info

Documents

Location

Message Center

Privacy

Resource Directory

🔔 You have received a request to complete a new **Customer Portal Satisfaction Survey** Assessment. Please click here.

🔔 You have received a request to complete a new **Customer Portal Pilot Conclusion Survey: What do you think of the Portal?** here.

ASSESSMENTS

NAME	DATE
Customer Portal Satisfaction Survey	04/05/2022

Dashboard
Activity
Assessments
Calendar
Community Info
Documents
Location
Message Center
Privacy
Resource Directory

May 29 – Jun 4, 2023

today   month week day list

	MON 5/29	TUE 5/30	WED 5/31	THU 6/1	FRI 6/2	SAT 6/3	SUN 6/4
all-day							
6am							
7am							
8am							
9am			9:00 - 11:00 2310 N. First Street, San Jose, CA, 95131. Phone. 408-278-6400				
10am							
11am							
12pm							
1pm							
2pm							
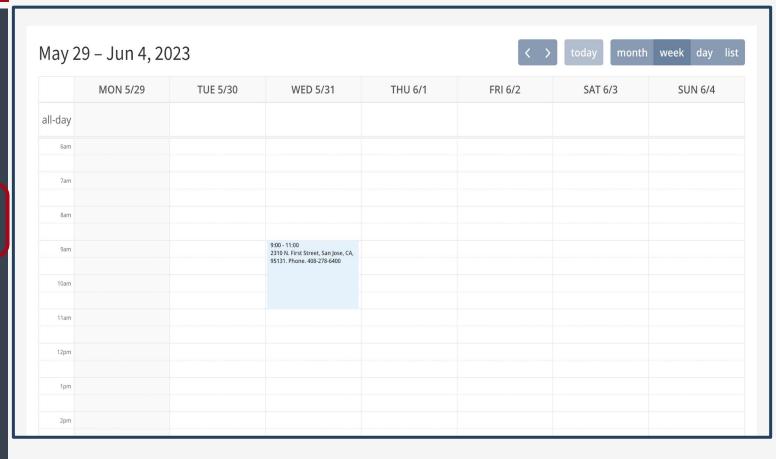
Calendar Functionality

- View appointments scheduled by care team members in Clarity

Future Functionality

- Ability for clients to schedule appointments with care team members directly through the Portal

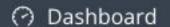- Ability for clients to add appointments to external calendars
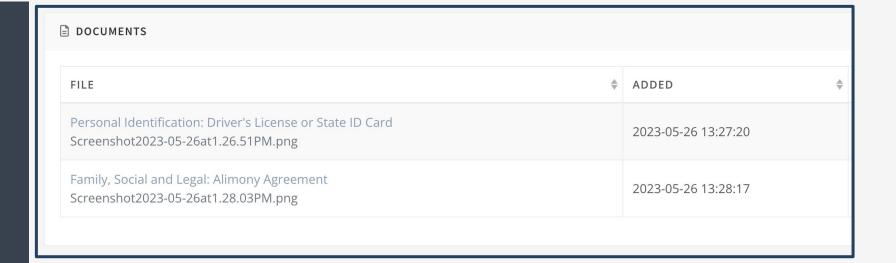
Current Functionality

- Ability to view articles with community information

- Ability to sort by title or date updated

- Ability to sort and filter by category *(in progress)*

DOCUMENTS

FILE		ADDED	
Personal Identification: Driver's License or State ID Card Screenshot2023-05-26at1.26.51PM.png		2023-05-26 13:27:20	
Family, Social and Legal: Alimony Agreement Screenshot2023-05-26at1.28.03PM.png		2023-05-26 13:28:17	

Current Functionality
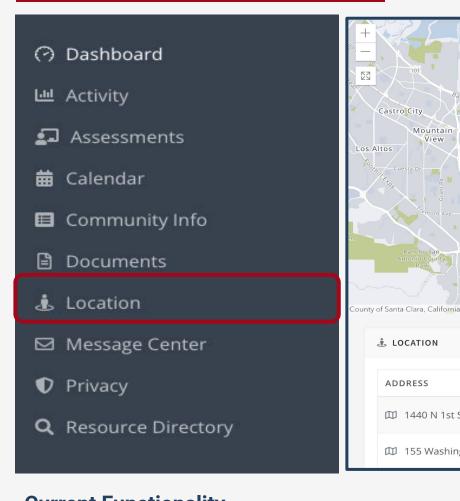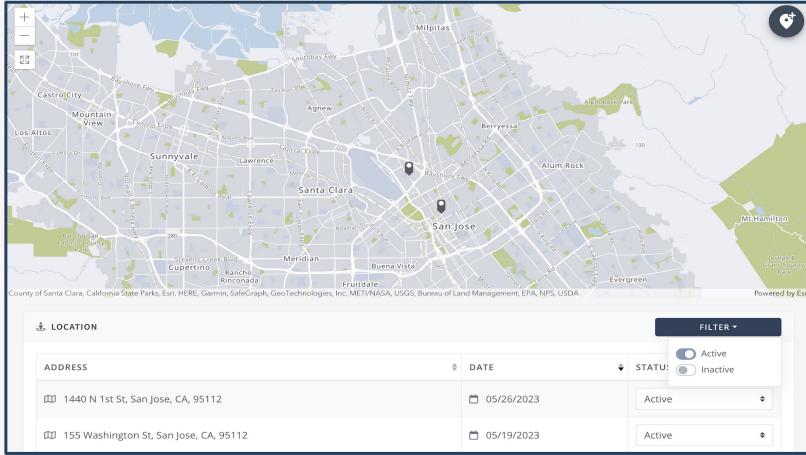
- Ability to upload documents requested by care team members

Potential Feature Enhancements

- Ability for clients to upload documents at any time (without care team member request)

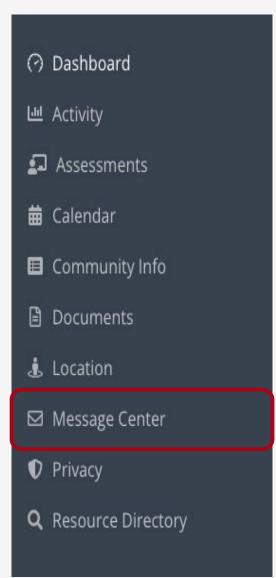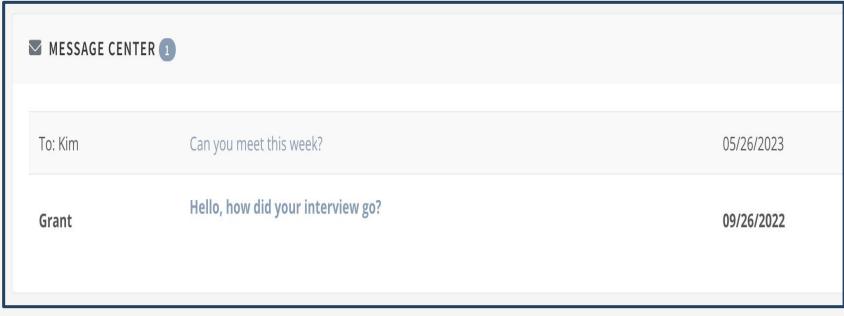- Ability for clients to upload more than one photo per request or upload

Current Functionality

- Ability to submit location

- Ability to set locations as inactive and filter on Active or Inactive locations

Potential Feature Enhancements

- Ability to add additional information related to location

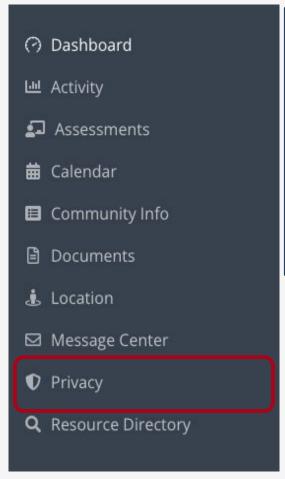- Ability for providers request to multiple clients at one time

25

MESSAGE CENTER 1

| To: Kim | Can you meet this week? | 05/26/2023 |
| **Grant** | Hello, how did your interview go? | **09/26/2022** |

Current Functionality

- Ability to send and receive messages to/from care team members

Potential Feature Enhancements
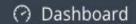
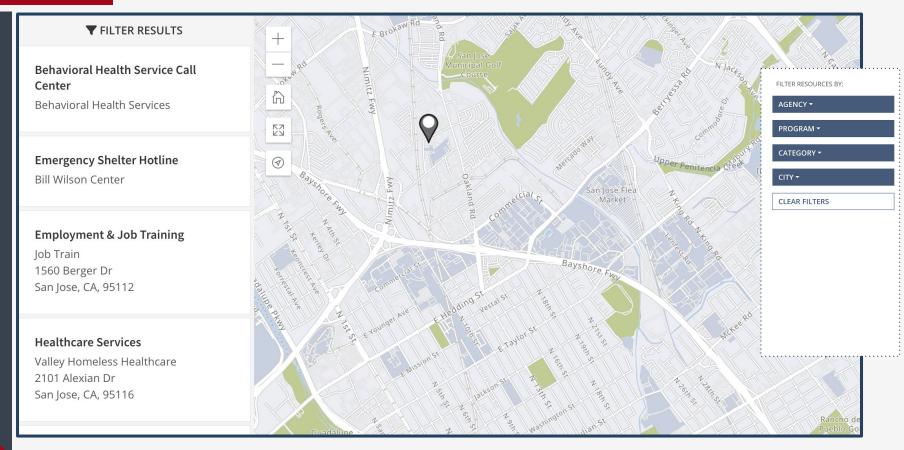- Ability for providers to send message blast to multiple clients at one time

Current Functionality

- Ability to review and sign Release of Information after requested by care team member
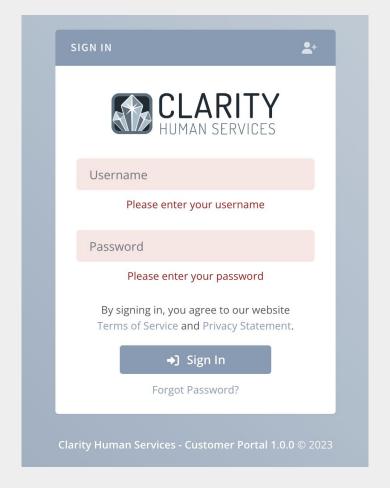
Current Functionality

- Ability to view configured resources on map and filter by agency, program, category, or city (or community-wide)

- Ability to print resources

Potential Feature Enhancements

- Provider ability to view resource directory in Clarity and send resources to clients

- Calendar function within resource directory

Client Portal Demonstration