

Customer Portal Pilot Program

Provider Participation Process



Customer Portal Pilot Program

The Customer Portal Pilot Program is officially open and will be concluding May 31, 2022. We are actively recruiting Santa Clara County homeless service providers for participation. The pilot includes a rolling participation process, and providers are welcome to join the program throughout the course of the pilot. The process for pilot participation is outlined below.

Step 1: Training Requirements

To participate in the pilot program, all staff included in the pilot will need to complete two 90 minute training sessions. Sessions were held live on February 16th and 17th, and recordings are available for providers who were unable to attend. Please have all staff who will be participating complete the following sessions:

- [Session 1: Client Interface](#)
- [Session 2: Provider Interface, Workflows, and Support Processes](#)

Step 2: Provider Participation Confirmation

Once training is complete, please submit the [Customer Portal Provider Participation Survey](#) to confirm your agency's participation. The survey collects information on the primary point of contact for the pilot, confirmation of programs that will be included in the pilot, and the staff members who will be using the Customer Portal throughout the pilot period.

Step 3: Customer Portal Access

After your agency has submitted the Customer Portal Provider Participation Survey, Bitfocus will confirm that all staff have completed the required training. Once training is confirmed, Bitfocus will complete Customer Portal configuration of your agency, programs, and staff.

Step 4: Access Confirmation

Bitfocus will notify the agency lead and individual users that configuration has been completed for the agency, programs, and staff included in the pilot. Please have all staff verify that they have access to send Customer Portal invitations. Once confirmed, your agency is free to begin sending invitations and request to clients!

Customer Portal Resources

[Customer Portal Provider Guide](#)

Comprehensive guide including provider instructions, client instructions, and practice recommendations

[Customer Portal Client Guide](#)

Client-facing guide with Customer Portal overview and account management instructions

Client Training Videos

[Account Creation & Management](#)

[Customer Portal Feature Review](#)

Project Team Consult

The project team is here to support providers every step of the way! If you have questions about the Customer Portal or the pilot program, please reach out to Grant Ebbesmeyer, grante@bitfocus.com, to schedule a time to meet.