



CFIVE CATALYST DEPLOYMENT PROCESS

5 - Step Deployment Process | Guide for System Admins

We're excited to get you started with Catalyst!

Our goal is to get your agency set up and using Catalyst quickly. This will serve as our roadmap into the Catalyst deployment process.

Implementation Timeline.

Your deployment timeline is less than two full days, and we expect your agency will be up and running within hours of the system launch.

- Day 1:
 - ▶ cFive deploys your Catalyst system, and provides you:
 - Login details for your Catalyst site
 - Access to Online Learning Library Resources for Admins
 - Access to Online Learning Library Resources for Agency Users
 - User Onboarding Curriculum (exercise/checklist)
 - ▶ Agency Admin sets up Users
 - Admin enters all Users into Catalyst
 - Admin sends introduction email to all Users (with Resource page login and onboarding exercise) - template provided
- Day 2 - Agency Launch:
 - ▶ User Onboarding (between 30 and 60 minutes)
 - Read and view Learning Library Quick Start Guides and Videos
 - Complete Onboarding
 - Set Up Dashboard (Officer Portal)
 - Complete Onboarding Exercises for Dashboard, Enrollment, Client Profile and Messages
 - Enroll Case Manager/Officer as test "Client"



Deployment Plan

Step 1: Introduction and Catalyst Walkthrough.

- ❑ An “Online Meeting” (call and online web demonstration) with key program stakeholders covering:
 - ▶ Review of how the app works for clients and the portal works for case manager.
 - ▶ Special focus on enrollment, dashboard, follow ups, messages.
 - ▶ Introduction to Deployment Manager.
 - ▶ Review Timeline and Select Go-Live Date.

Step 2: Choose an Administrator.

The responsibilities of your Catalyst System Administrator (Admin) will include:

- ▶ Serve as the main point of contact for the Catalyst system within your agency between cFive and your agency.
- ▶ Share all Catalyst information with you team.
- ▶ Coordinate the User Onboarding process, and ensure your team participates.
- ▶ Complete the tasks required to set up your system (such as entering Users), or ensuring that the person(s) you have designated complete the tasks.
- ▶ For your agency, you will be responsible for initial system set up/configuration, managing settings, and other tasks as needed throughout your product use (such as adding new users and unlocking users who have locked themselves out of the system).

Step 3: Catalyst User Configuration (User Set Up)

- ❑ **User Set Up.** Agency Admin enters all Users into Catalyst.
- ❑ **User Introduction.** Agency Admin sends introduction email to all Users (with Resource page login and Onboarding Curriculum).



Step 4: User Onboarding

- ❑ **Review Training Materials.** Users review the Quick Start Guides and Videos.

- ❑ **Onboarding Exercises.**

During your online-based onboarding, Users will use the Catalyst Resource website to access a learning library to familiarize themselves with the major functions of Catalyst, including enrolling new clients and messaging.

 - ▶ Review all Quick Start Guides and watch Videos
 - ▶ Complete Onboarding Exercises, including:
 - Setting Up Client Dashboard and Enrolling Clients (each team member will enroll themselves as a test client).
 - Configuring Catalyst Dashboard (Officer Portal). How to view Follow Ups and Messages for any client.
 - Messaging. Sending and receiving messages with your clients and notification for both client and case manager.

Step 5: Catalyst Launch

- ❑ **Enroll Clients.** Following Onboarding, Case Managers/Officers can begin to Enroll Clients in Catalyst.

- ❑ **Schedule Weekly Touchbase Sessions.**
 - ▶ Weekly calls to review your use of Catalyst (Admin and cFive).