



cFive Catalyst Quick Start Guide

Client Profile



**Data-driven
Outcomes**

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This Quick Start Guide provides step-by-step instructions to allow users to familiarize themselves and use cFive Catalyst's Client Profile.

Additional Learning Resources

cFive provides a library of learning resources at our website at:

<https://www.cfive.com/covid-19-support-program-resources>

The Online Resource Page contains a variety of informational resources including Quick Start Guides, Videos and informational documents. There are a series of Videos that partner with the Quick Start Guides to provide additional information and visual reference for the topics.

Minimum Phone Operating Systems Supported

In order to maintain stringent security protocols, cFive can only support Catalyst installed on these Operating Systems:

ANDROID: Version 6, Marshmallow from October 5, 2015 and above

iOS: iPhone 6s or above with the latest iOS operating system 10



CLIENT PROFILE

The **“Client Profile”** section is where you will begin the majority of your daily activity within Catalyst. The Client Profile contains all information related to the client’s record in Catalyst, and is divided into several different sections:

- Overview
- Appointments (Not Activated)
- Messages
- Questionnaires (Not Activated)
- Personal Information
- Enrollment

Accessing the Client Profile

Step 1: From your dashboard, click on the name of the client record you want to view:

The screenshot shows the cFIVE Catalyst dashboard. At the top, there is a navigation bar with the cFIVE Catalyst logo, a search icon, and links for LOG OUT, ADMIN, and a mail icon. Below the navigation bar, there are tabs for CFIVE TENANT 1, DASHBOARD, and ENROLL. The main content area is titled "Dashboard" and features a "Client Type" section with a table of client records.

Name	Client Type	Phone	Email	Score
Dakota, North	Specialty Court	(214) 529-2171		
Foot, Julian	Adult	(214) 529-2171		BRONZE
Jones, Sam	Juvenile	(214) 529-2171		SILVER

You will be redirected to the client’s **Client Profile** page:

The screenshot shows the Client Profile page for Julian Foot. The page is divided into two main sections: a profile overview and an overview of follow-ups.

Client Profile Overview:

- Name:** Julian Foot
- DOB:** 01/08/1969 (Age 51)
- CLIENT ID:** JULIAN.FOOT
- Case Manager:** James Newman
- Current Points:** 36
- Score:** BRONZE

Overview Section:

Follow Ups

Issue	Due Date	Category
2 Past Due Appointments	December 12, 2019	Appointments
1 Unread Message	December 19, 2019	Messages



WORKING IN THE CLIENT PROFILE

Client Profile: Overview Screen

When you first open the “Client Profile” you will be on the “Overview” screen. The Overview screen is the “Home” page for the Client Profile.

This area contains an at-a-glance snapshot to the client and their progress, provides quick links to other sections within the Client Profile that records client data, and is the launching pad for creating new Appointments and Messages, and changing Questionnaire frequency.

Here you can quickly find:

- DOB
- Client ID
- Case Manager
- Client Point Status
- Follow Ups
- Trends

At the top of the screen you will find:

At-a-glance details of key client data is located at the top of the left-hand column. The client information includes:

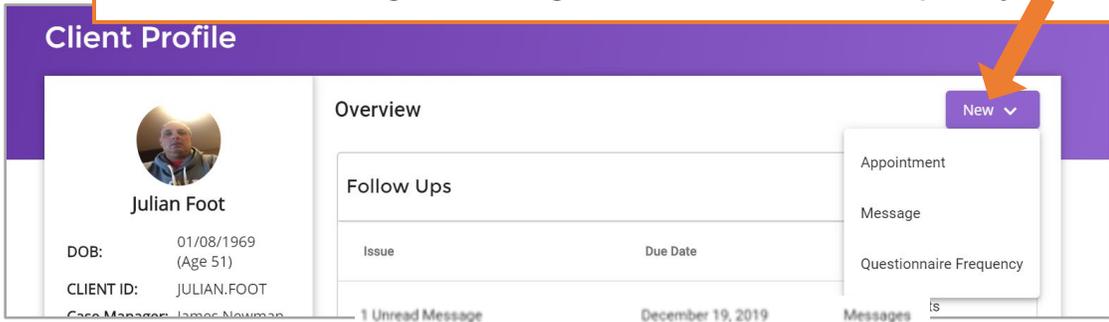
- DOB
- Client ID (Client’s Catalyst User Name)
- Case Manager assigned
- Current Points (Catalyst responsiveness status)

For quick review you will find the “Follow Ups” section at the top of the screen. This provides you an at-a-glance recap of the items you need to Follow Up on your client with. This section provides you the status of the client’s Messaging activity.

Issue	Due Date	Category
1 Unread Message	December 19, 2019	Messages



The “New” button allows you to quickly schedule a new Appointment, send a new Message, or change the Questionnaire frequency.



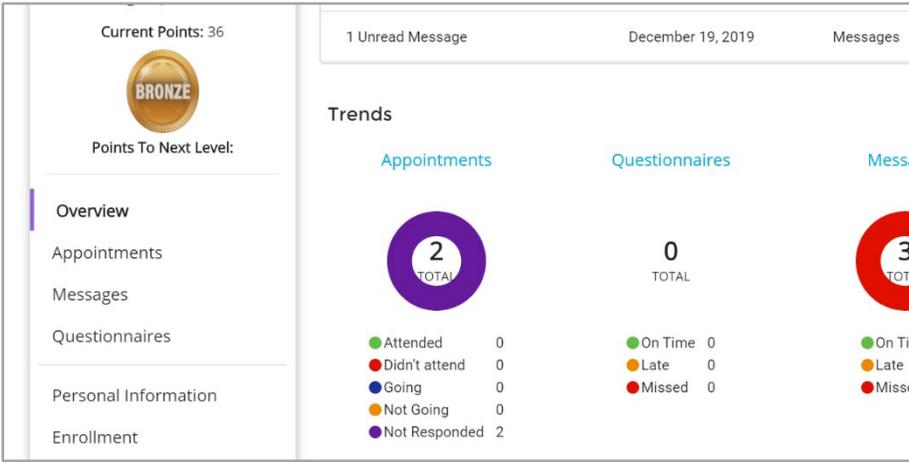
As you scroll down on the webpage you will find other useful pieces of information and links to the sections of the Client Profile.

The left-hand column allows you to quickly navigate throughout the Client Profile record. Directly beneath the points section (beneath the Catalyst badge icon) you will find links to the other screens within the Client Profile record. Each heading is a quick link to allow you to access the specific sections (screens) associated to the Client Profile.

TIP: The purple bar to the left of the heading name shows which section you are currently on.

Sections include:

- Overview
- Appointments (Not Activated)
- Messages
- Questionnaires (Not Activated)
- Personal Information
- Enrollment





TIP: The “Issue” items are hyperlinks to the Appointments and Messages webpages. Simply Click on the text to be redirected to your desired page.

Client Profile

Overview New ▾

Follow Ups

Issue	Due Date	Category
2 Past Due Appointments	December 12, 2019	Appointments
1 Unread Message	December 19, 2019	Messages

Client Profile Details:
Julian Foot
DOB: 01/08/1969 (Age 51)
CLIENT ID: JULIAN.FOOT
Case Manager: James Newman
Current Points: 36
BRONZE

The “Trends” section of the Overview provides a snapshot view of how the client is doing. It provides at-a-glance data for Messages.

Trends

- Appointments
- Messages
- Questionnaires
- Personal Information
- Enrollment

Appointments	Questionnaires	Messages
4 TOTAL	30 TOTAL	9 TOTAL
● Attended 0	● On Time 0	● On Time 0
● Didn't attend 0	● Late 0	● Late 0
● Going 0	● Missed 30	● Missed 8
● Not Going 0		
● Not Responded 4		

Questionnaire Sets & Frequency

Questionnaire Set	Frequency
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OVERVIEW OF CATALYST CLIENT PROFILE

As you drill further into Catalyst’s Client Profile you will find webpages that provide additional information and insight related to the client. This section of the Quick Start Guide is intended to help users familiarize themselves with each area and provide a reference of the specific pieces of data contained within each section.

Detailed steps on functionality and how to use the areas will be provided in the dedicated sections of the Quick Start Guide.

List Sorting

You can change the order of the elements in any list on this screen. Mouse over the heading of any column, and the arrow icon (“↑”) will appear to the right of the column header. Simply Click on the arrow to change the order of the elements.

Overview New ▾

Follow Ups

Issue ↑	Due Date	Category
2 Unread Messages	February 11, 2020	Messages

Overview New ▾

Follow Ups

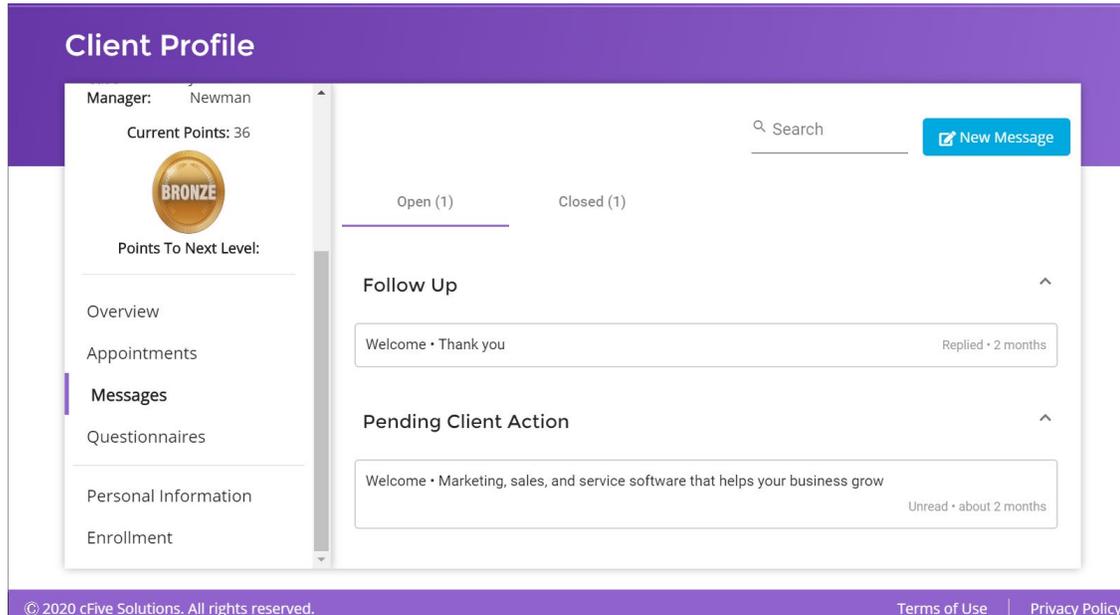
Issue	Due Date ↑	Category
2 Unread Messages	February 11, 2020	Messages



Client Profile: Messages Screen

Consists of two sections:

- Open (open messages)
- Past (closed messages/message strings)



TIP: Using the “Search” (indicated by the magnifying glass icon), you can quickly search key words or phrases to find a specific message.

Client Profile: Personal Information Screen

Consists of two sections:

- Personal Information
- Employment Information

What is Collected in the Personal Information Screen

There are four groups of data recorded in this area: basic information, Demographic information, identifiers and address. Some fields are required pieces of information that must be entered before the user can save the record (indicated by an asterisk symbol “*”). Other fields can be entered at the user and/or agency’s discretion.

This is the data recorded in each section of the Personal Information Screen:



Basic Information

- First Name
- Middle Name
- Last Name
- Email address
- Client Type
- Phone Number

Demographic Information

- DOB
- Gender
- Marital Status
- Nationality
- Language
- Ethnicity
- Race

Identifiers

- Alien Registration Number
- Drivers License
- Passport Number
- School ID
- State ID

Address

- Street
- Apartment/Unit Number
- City
- State
- Zip
- Country

What is Collected in the Employment Information Screen

This section contains information related to the client's employment. Some fields are required pieces of information that must be entered (indicated by an asterisk symbol "*"). Other fields can be entered at the user and/or agency's discretion.

You may record as many employers as needed in this section. Simply select the **"Add"** button and fill in the data:

- Employer Name
- Job Title
- Employee Phone
- Street Address
- Apt/Unit
- City
- State
- Zip Code
- Country



Client Profile: Enrollment Screen

Displays:

- Enrollment Start Date
- Enrollment End Date
- Catalyst Level (Supervision Level)
- Biometric Activation Date
- Officer Assignment
- Created By
- Creation Date
- Username (the client's assigned Catalyst mobile App login ID)
- Check box indicators for:
 - Can Initiate Messages
 - Biometric Active

The screenshot shows the 'Enrollment' screen for a client named Julian Foot. On the left, there is a profile card with a photo, name, and details: DOB (01/08/1969, Age 51), CLIENT ID (JULIAN.FOOT), Case (James), Manager (Newman), Current Points (36), and a BRONZE badge. Below the profile card are navigation links for Overview, Appointments, and Messages. The main 'Enrollment' section contains the following fields and options:

- Enrollment Information**
- Enrollment Start Date: 12/9/2019
- Enrollment End Date: (empty)
- Catalyst Level: Level 2
- Biometric Activation Date: 12/09/2019
- Officer Assignment*: Newman, James
- Created By: James newman
- Creation Date: 12/09/2019
- Username*: JULIAN.FOOT
- Assignment Comment: (empty)
- Can Initiate Messages:
- Biometric Active:

At the bottom of the enrollment section are 'Save' and 'Cancel' buttons. A photo of the client is shown on the right side of the form. The footer contains the copyright notice '© 2020 cFive Solutions. All rights reserved.' and links for 'Terms of Use' and 'Privacy Policy'.