cFive Catalyst
Quick Start Guide

Client Profile

cFive Solutions, Inc.
949.260.3000 | www.cfive.com

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Covid-19 Support Program

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

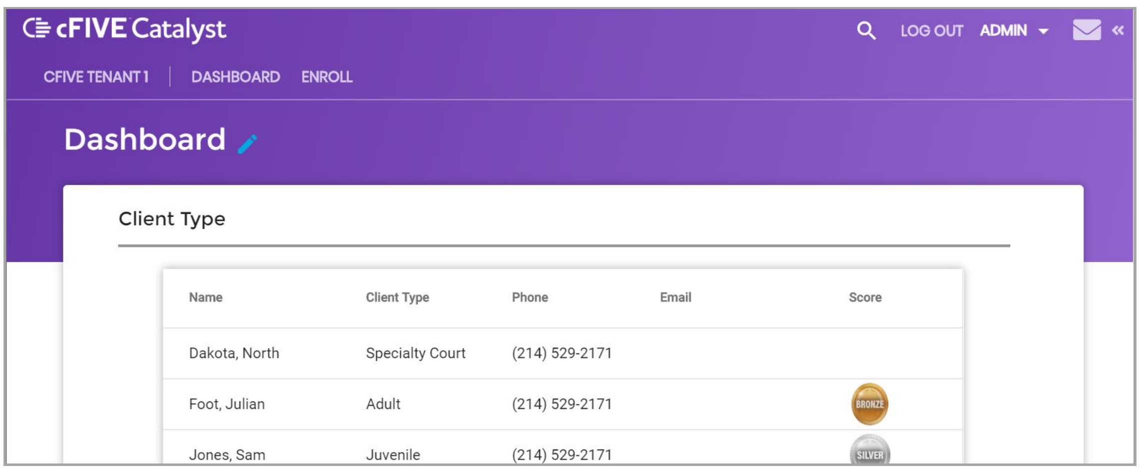
Client Profile

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:

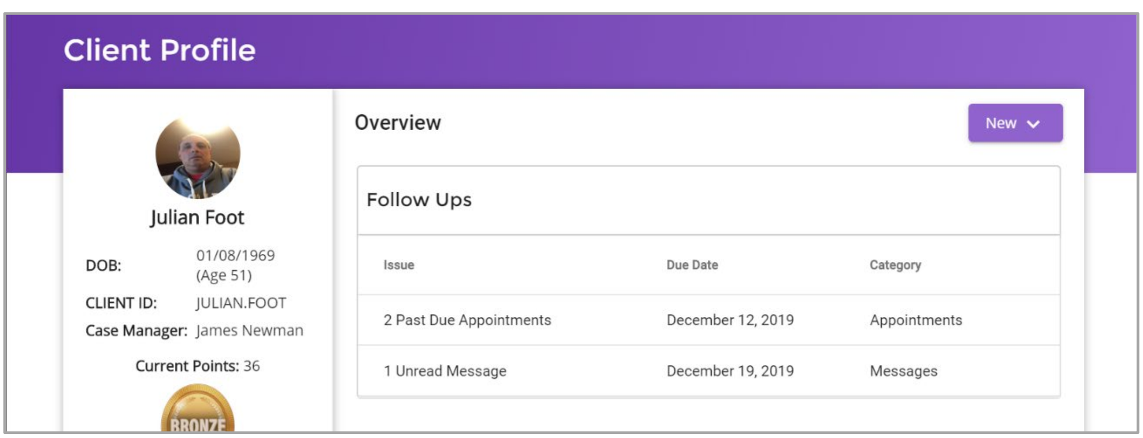
- Overview
- Appointments (Not Activated)
- Messages
- Questionnaires (Not Activated)
- Personal Information
- Enrollment

Accessing the Client Profile

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



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



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:

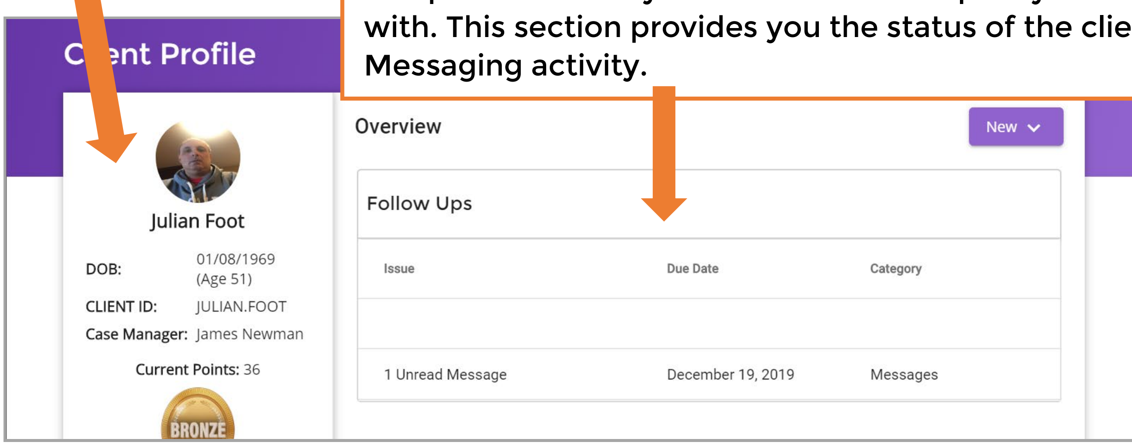
- DOB
- Client ID
- Case Manager
- Client Point Status
- Follow Ups
- Trends

At the top of the screen you will find:

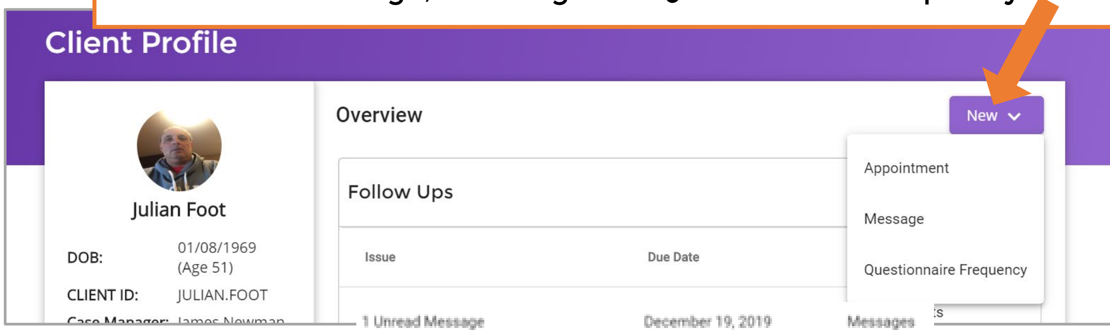
At-a-glance details of key client data is located at the top of the left-hand column. The client information includes:

- **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.



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



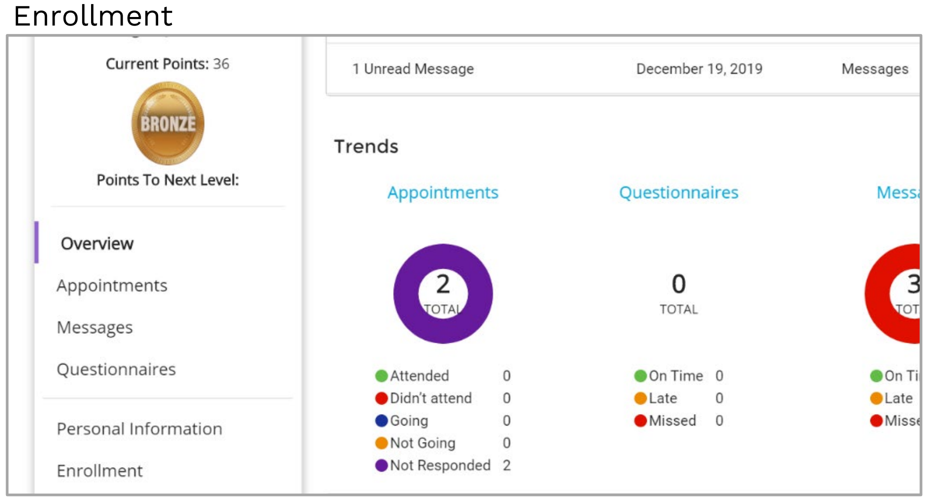
As you scroll down on the webpage you will find other useful pieces of information and links to the sections of the Client Profile.

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.

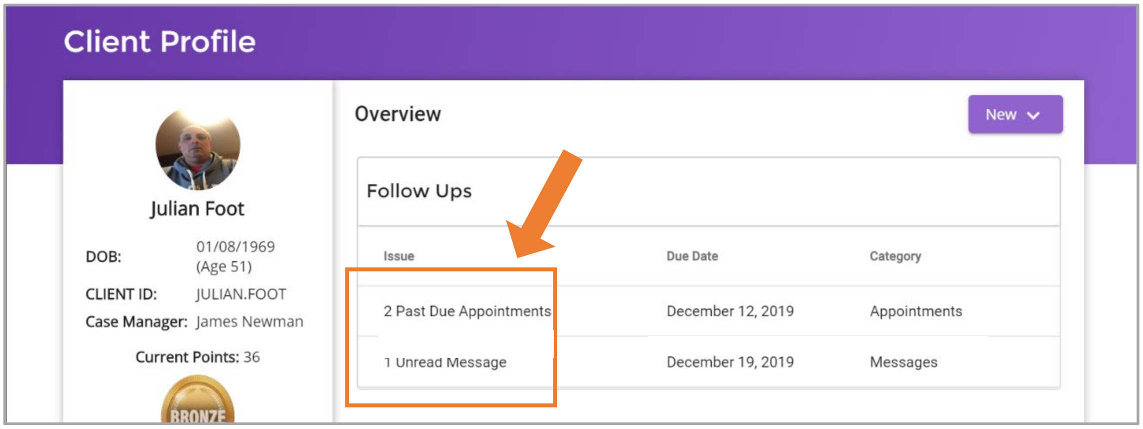
TIP: The purple bar to the left of the heading name shows which section you are currently on.

Sections include:

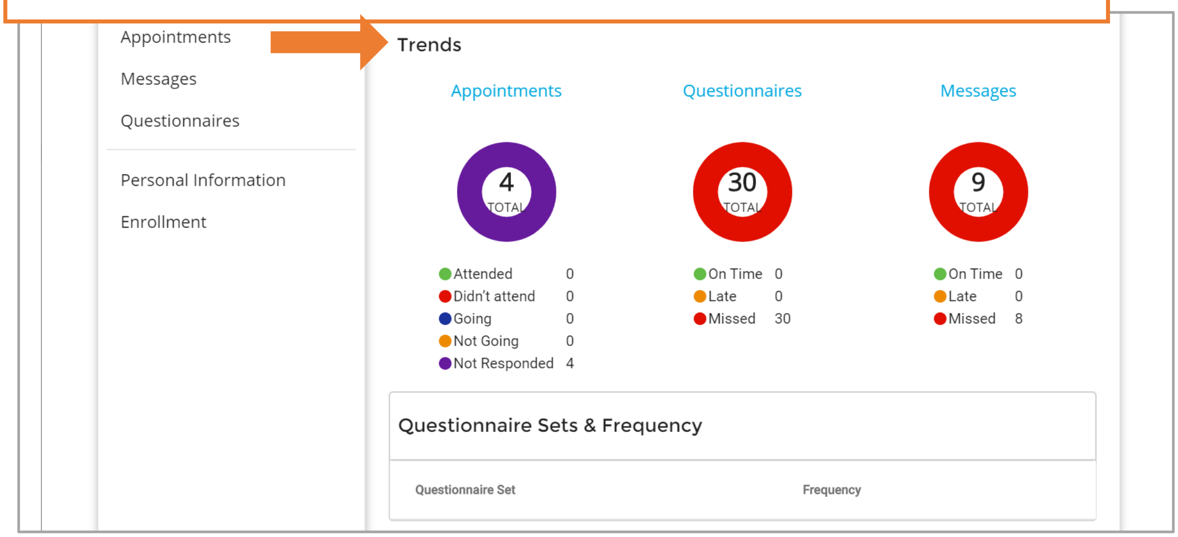
- Overview
- Appointments (Not Activated)
- Messages
- Questionnaires (Not Activated)
- Personal Information
- Enrollment



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



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



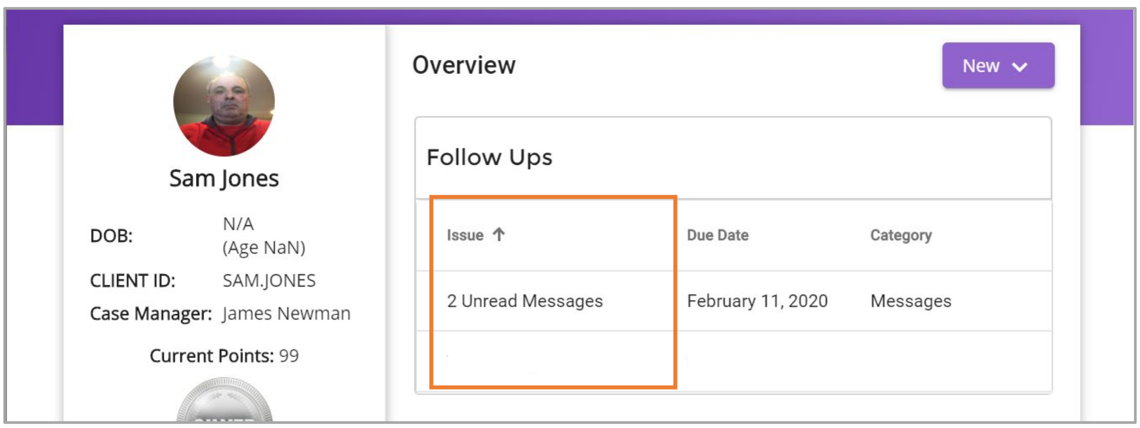
Overview of Catalyst Client Profile

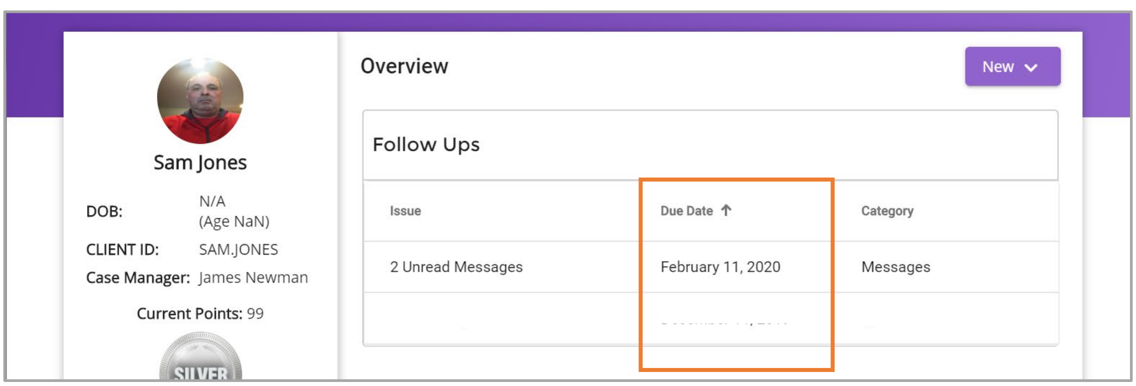
As you drill further into Catalyst's Client Profile you will find webpages that provide additional information and insight related to the client. This section of the Quick Start Guide is intended to help users familiarize themselves with each area and provide a reference of the specific pieces of data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

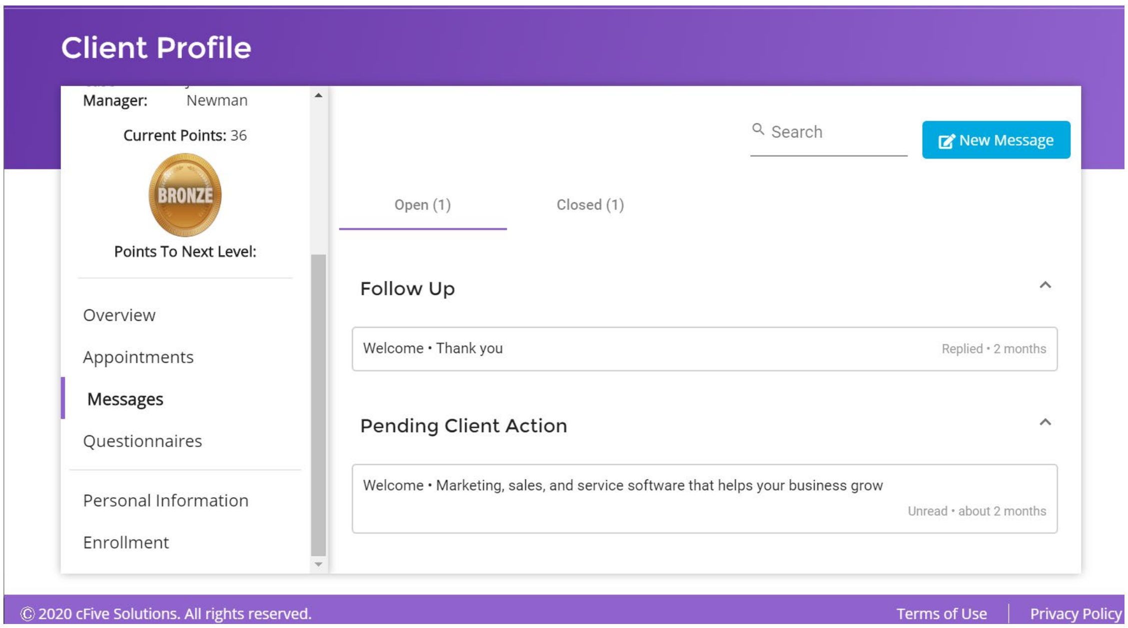




Client Profile: Messages Screen

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