



cFive Catalyst Quick Start Guide

Getting Started with the Catalyst Portal

Officer Portal Login | Dashboard



Data-driven
Outcomes

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Table of Contents

INTRODUCTION	2
Additional Learning Resources.....	2
Minimum Phone Operating Systems Supported	2
LOGGING INTO THE OFFICER PORTAL.....	3
URL	3
Username and Password.....	3
NAVIGATION: GETTING STARTED WITH CATALYST	4
Setting Up Your Catalyst Dashboard.....	4
Opening & Closing the Follow Ups List	5

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INTRODUCTION

This Quick Start Guide provides step-by-step instructions to get started with cFive Catalyst including information about the Officer Portal Login and Dashboard.

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



LOGGING INTO THE OFFICER PORTAL

Logging into the cFive Catalyst Officer Portal is the first step to begin using cFive Catalyst.

URL

Your cFive Catalyst Officer Portal can be accessed at the following url:

<https://catalyst2.cfive.com/>

1. The cFive Catalyst login page will display.

The screenshot shows the login interface for cFive Catalyst. It features a purple header with the logo and the text 'cFIVE Catalyst'. Below the header, there are two text input fields labeled 'Username *' and 'Password *'. A link for 'Forgot password' is located below the password field. At the bottom of the form, there are two buttons: a red 'Clear' button and a purple 'Login' button.

Username and Password

Your user name and password will be provided by your agency. Your user name is typically your email address.

Your user name: _____

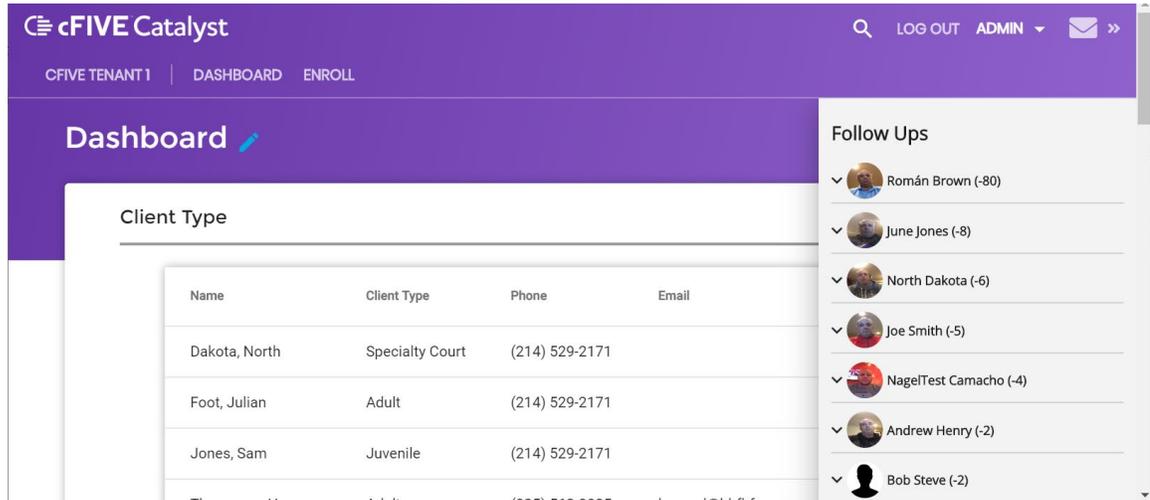
Your password: _____



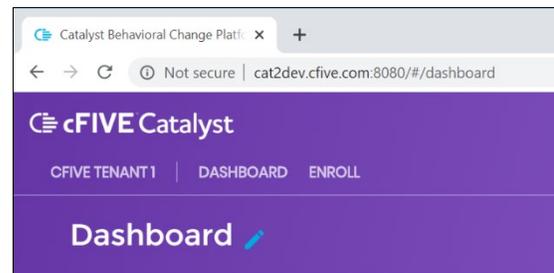
NAVIGATION: GETTING STARTED WITH CATALYST

SETTING UP YOUR CATALYST DASHBOARD

As an Officer, you will see your Catalyst Dashboard when you log in.



1. **Set Up Your Dashboard.** For easy navigation, you should set up your Dashboard before starting to work in Catalyst. To do that, select the blue pencil symbol to the right of the Header that says “Dashboard.”

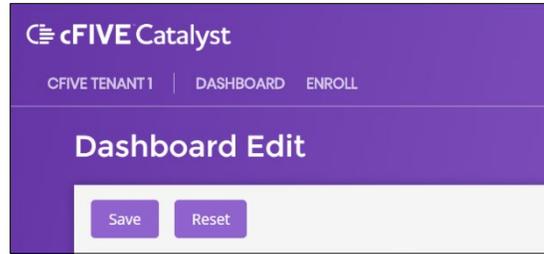


2. To change how your Client list displays on your desktop dashboard, use the blue arrows located next to the “Client Type” header. The arrows will let you expand or reduce the list.





3. After you have made your desired changes, choose the purple “Save” button beneath the “Dashboard Edit” header. This will save the current settings as your Desktop format.

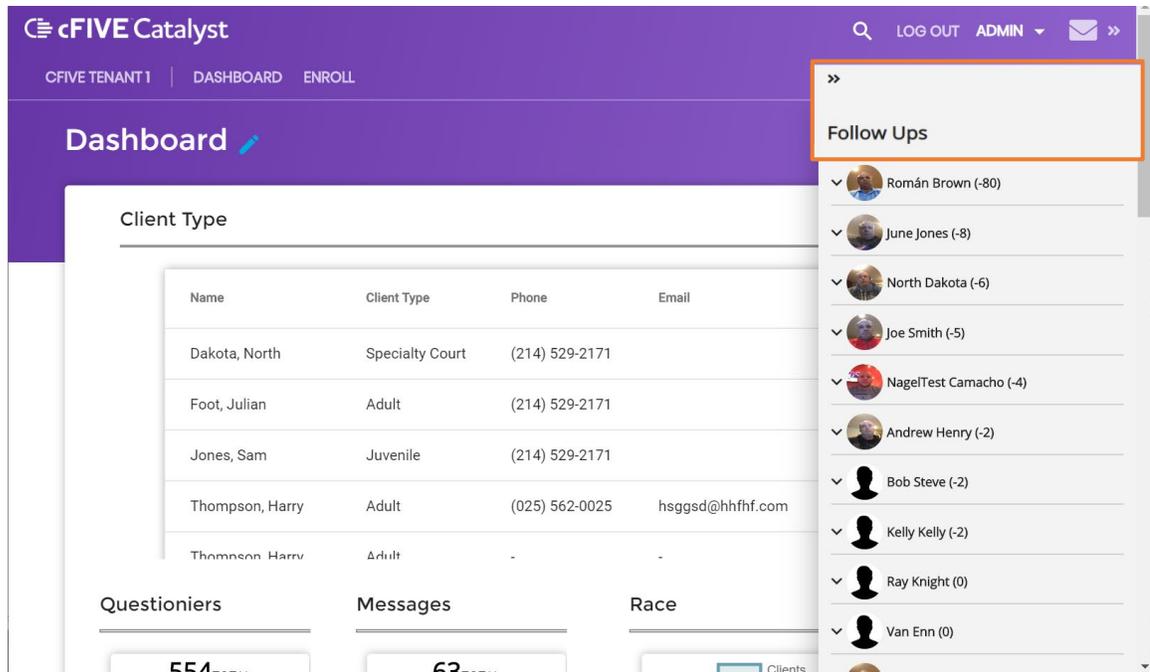


NOTE: Catalyst allows you to change your Dashboard as often as you would like. To change your display, simply select the blue pencil beside the “Dashboard” heading you see when you login and edit as desired. (Image shown in screenshot in step 1.)

OPENING & CLOSING THE FOLLOW UPS LIST

1. When you login to Catalyst your “Follow Up” list will **automatically** be displayed on the right-hand side of your dashboard.

The list is displayed in priority order, with the clients at the top of the list requiring the most follow up. The image below shows the list “open.”



2. To open or close the Follow Up List use the double arrows on the right-side of the screen (top of your Dashboard). The image below shows it “closed.”

