cFive Catalyst

User Quick Start Guide

cFive Solutions, Inc.
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cFIVE™

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This Quick Start Guide is designed as a quick resource for the User as they help Client's download the Catalyst Mobile app, and provides onboarding exercises to help assess your familiarization with Catalyst.

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

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cFive Catalyst User Onboarding Exercises

Now that you have reviewed the comprehensive library of Quick Start Guides and Quick Start Videos, it's time to review. This section provides a checklist to make sure you are familiar with the key components of Catalyst.

If you have questions, don't forget to review the Resource Library for step-by-step instructions and valuable tips.

The goals of this exercise are for you to:

- Experience the use of Catalyst as a Client **and** as a Case Manager/Officer.
- Send and receive Messages as both the Case Manager/Officer using the Officer Portal (dashboard) **and** as your Client (using the mobile app).
- Familiarize yourself with the Catalyst Enrollment and Client Profile sections.
- Configure your personal Catalyst Dashboard.

User Exercises for Success

Complete the steps outlined in each of the following subject areas:

1. **LOGIN:**

   a. Open a browser
   b. Go to this URL **https://catalyst2.cfive.com/#/login**
   c. Login with your user name and password

2. **DASHBOARD:**

   a. Using the pencil icon, view dashboard elements
   b. Try to drag and drop elements to your dashboard, and resize them
   c. Save your personal dashboard

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3. ENROLLMENT:

    a. Enroll yourself as a "Client" so you can see how things work from both the desktop Officer Portal **and** from the Client's perspective on the mobile app.

Note: Make sure to assign yourself as the "Officer" for your test Client.

    b. Follow the SMS test instructions sent to your cell phone and:
        i. Download and install the Catalyst Mobile App
        ii. Login and complete the Client side of Enrollment
    c. Verify & complete the enrollment of your client

4. NAVIGATION & SEARCH:

    a. Check to make sure you can find your client record listed as a client on your dashboard
    b. Try a search using the magnifying glass icon to find a Client

5. MESSAGES:

    a. As the Case Manager/Officer:
        i. Send messages to your Client record
        ii. Send a second message and Use the "Read Only" check box
    b. As the Client:
        i. Reply to the message that you sent as the Case Manager/Officer
        ii. Send a new message to the officer
        iii. Read the Read only Message
    c. Create a Message template
    d. Send a Message using a template to your Client
    e. Send a Group Message
    f. After you have entered some messages into the system:
        i. Access the Messaging Notification icon (envelope), and review how it manages your messages:
            1. Read, replied messages
            2. Read, not replied messages
            3. Unread messages
        ii. Review the Follow Up bar
            1. Note how pending actions are displayed

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6. CLIENT PROFILE:

    a. Check out the screens available within the Client Profile
    b. Review the types of information that is recorded
    c. Review how things appear when your client takes action
    d. Review the process to Unenroll (deactivate) a Client in Enrollment

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DOWNLOADING THE CFIVE CATALYST MOBILE APP

STEPS TO DOWNLOAD THE CATALYST MOBILE APP

1. From the client's smartphone, go to the text/SMS message that Catalyst sent and click on the correct version -- IOS or Android -- and download the APP.

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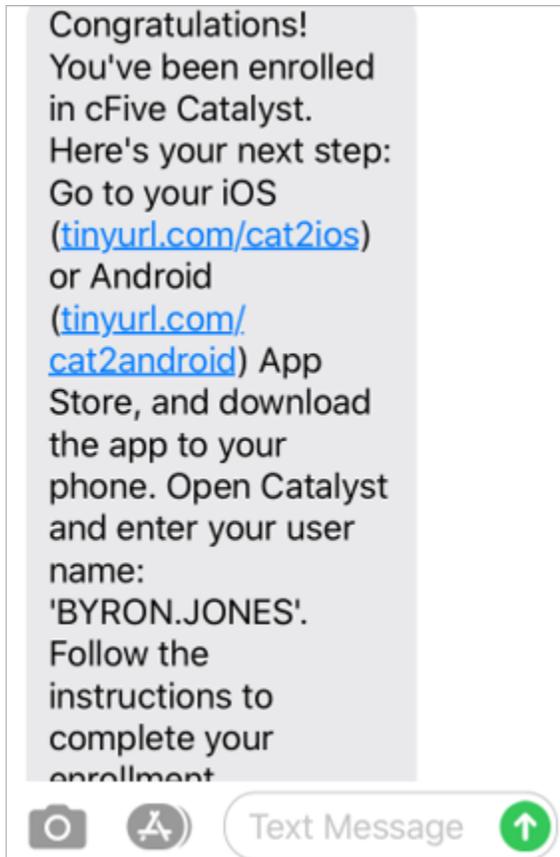
2. When the Catalyst 2.0 App has been downloaded the user will receive a message on their phone screen asking if they will allow Catalyst to send "Notifications."

The user must choose the option: "Allow."
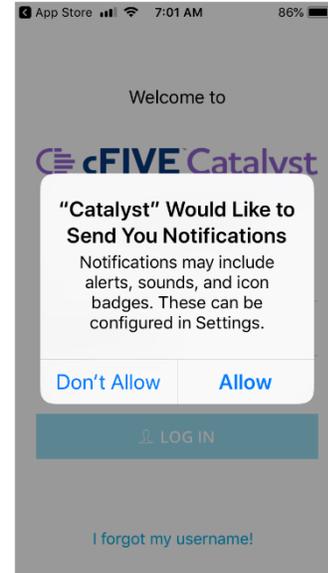
3. In the text message above it provides them their user name. (Typically formatted as a first name + period + last name. For example: "JOHN.SMITH"). When inputting the user name into Catalyst the user does not need to use all capital letters.

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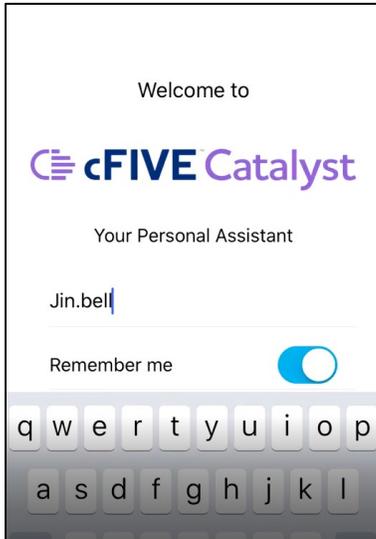
4. Once the Catalyst App has been set up on the client's smartphone, the client will be able to go through the steps to enroll into your Catalyst program.

Catalyst uses two-factor authentication (using facial and voice recognition), so the system will have the client go through steps to set up their face (photo) and voice components.

NOTE: You should make your client aware that Catalyst will send them two additional requests (pop-up messages) during their enrollment process asking if they will allow Catalyst to access the phone's camera and microphone. The client MUST accept both options to complete the Enrollment successfully and enable Catalyst to function properly.

The client will receive a "Congrats" message when they have successfully completed their enrollment.

1. Taking the Photo Confirmation

2. Recording the Voice

3. Completion

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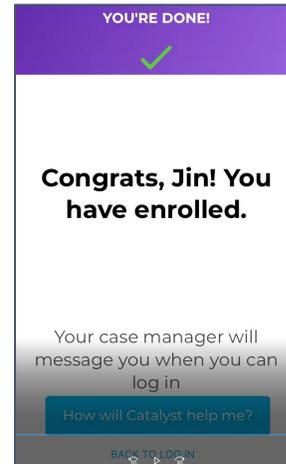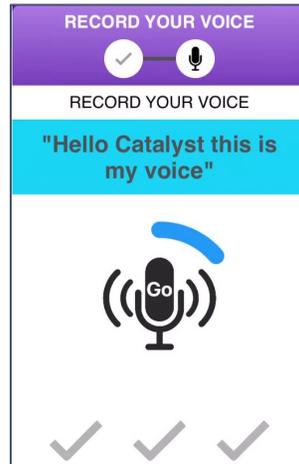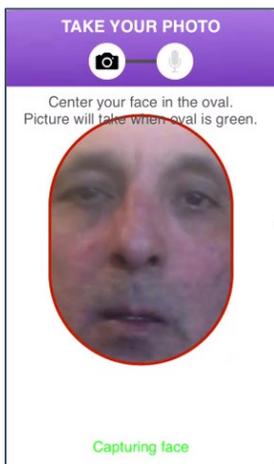
5. Once the case manager verifies the enrollment, the Catalyst program will send the client the following Text message to alert them that they are now enrolled and can begin to use the App.

Congratulations! You've been enrolled in cFive Catalyst. Here's your next step: Go to your iOS (tinyurl.com/cat2ios) or Android (tinyurl.com/cat2android) App Store, and download the app to your phone. Open Catalyst and enter your user name: 'BYRON.JONES'. Follow the instructions to complete your enrollment.

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