cFive Catalyst
Quick Start Guide

Messages Envelope Icon

Data-driven Outcomes

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INTRODUCTION

This Quick Start Guide provides step-by-step instructions to allow users to familiarize themselves and use cFive Catalyst's Messages Envelope Icon (located in the navigation bar of your Catalyst 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

Browser Recommendations

Catalyst is optimized for secure, standards compliant web browsers. In order to view and use Catalyst optimally, you should use a web browser other than Internet Explorer. (In January 2016 Internet Explorer reached the end of its support lifecycle and no longer receives technical support, performance enhancements or security updates.) cFive recommends using the Chrome browser.

These browsers provide faster and more responsive browsing, better security, and an overall improved experience. It is highly recommended that you keep your browser updated, as older versions may not support the latest security standards.

Catalyst provides several options to help users quickly review the status of their clients, client enrollment, message activity, etc. Those tools include the "Enrollment", "Follow Ups" and the "Messages" envelope functions.

MESSAGES ENVELOPE ICON

As a user of Catalyst, the Messages Envelope Icon helps you manage your client messages by caseload. You can view all messages that have the following statuses: Read, Unread and Replied, and you can reply or close a message thread. Additionally, you can send messages to multiple clients, one client, or one or more caseload of clients.

Each recipient will receive a one-on-one message (unlike traditional text messaging).

Message activity can be accessed through the Message Envelope icon. This is indicated by the "envelope" icon on the upper right-hand section of your Catalyst toolbar:
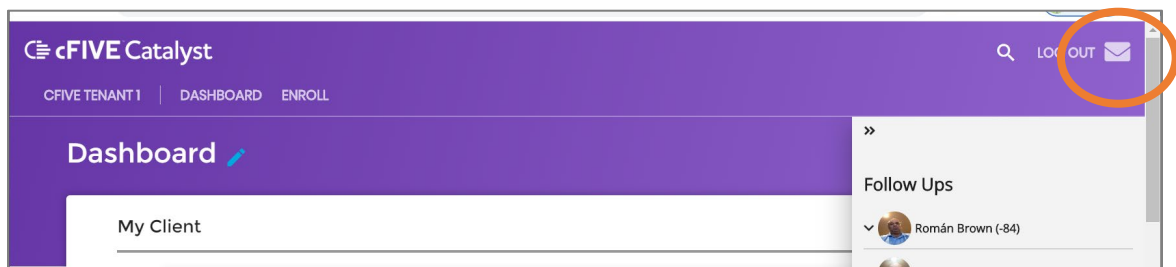

At-A-Glance Message Activity (Messages Queue Screen)

Clicking on the envelope icon will open the Messages Queue screen. Case Managers will find message activity from all the Client's on their caseload in this display queue.
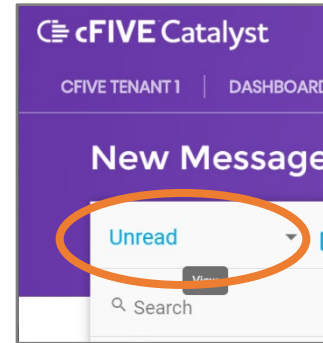
From this area, the User can search message activity by three status types:

- **Replied Messages**: The client has Read *and* Replied to the officer's message)
- **Unread Messages**: The client has NOT read the message
- **Read**: The client has Read the message, but has NOT replied to it
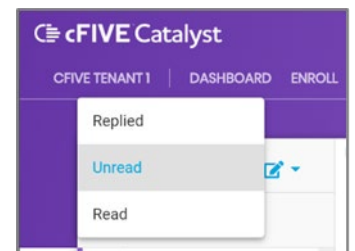
The User can toggle between the message types using the blue drop-down menu.

NOTE: Message Notifications are tracked in real-time, and continually update as the User changes screens and/or refreshes their browser.

Working within the Messages Queue

As the User views the Messages Queue screen, there are some visual cues that help them understand specific characteristics related to the message.

1. **Messages are color-coded**. A message that is displayed in red text and features a red triangle icon indicates to the User that they (the User) have not yet read or opened this dialog box. When the User clicks on a specific message from the queue that color of the text of that message will change to black. This allows the User to quickly see which messages they have previously viewed and which have new activity.
2. **Purple Status Bar**. A vertical purple bar will be displayed on the left-hand side of the message that is currently open within the queue.
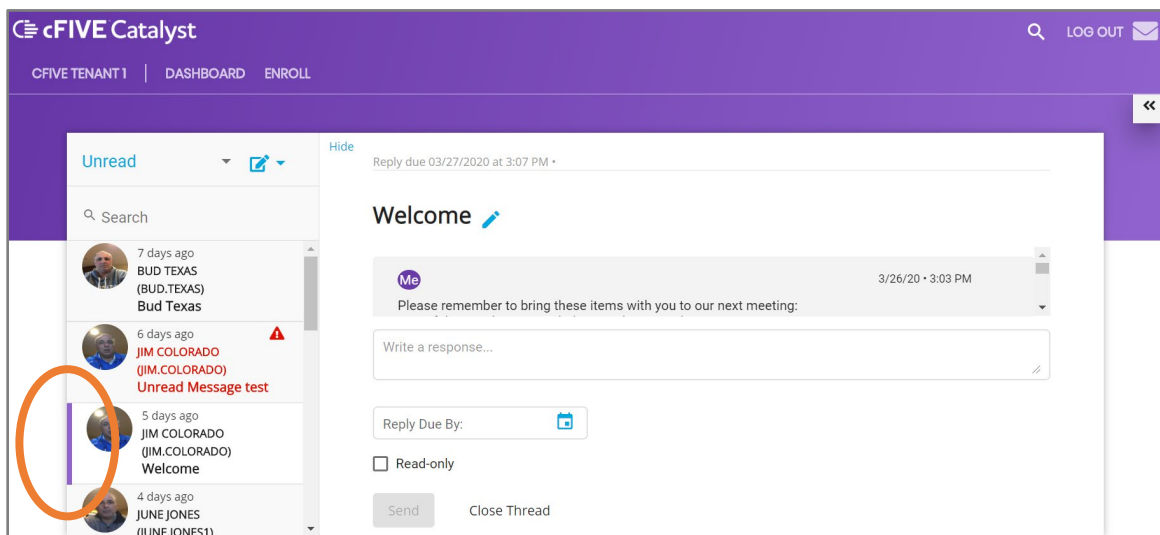
View a Message

Clicking on the message thumbnail from the message listing displays the message text and all related activity for that message (such as the original message text and the content of any replies from the Client). The message content area also provides date and time stamps for all activities.
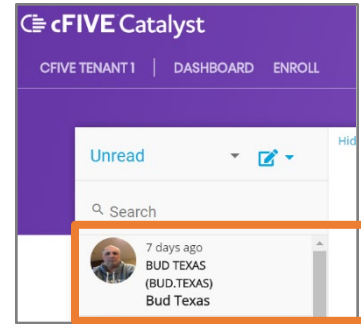
Working from the Messages Queue

The Messages Queue helps Users review messages and continue to work without needing to go to each Client's individual profile. When a specific message is opened (by clicking on the message thumbnail from the listing), Users can perform several actions:

1) Respond to the Client's message, or create a new message
2) Add or update the "Reply Due By" date
3) Mark the message as "Read-only"
4) Close the Message Thread
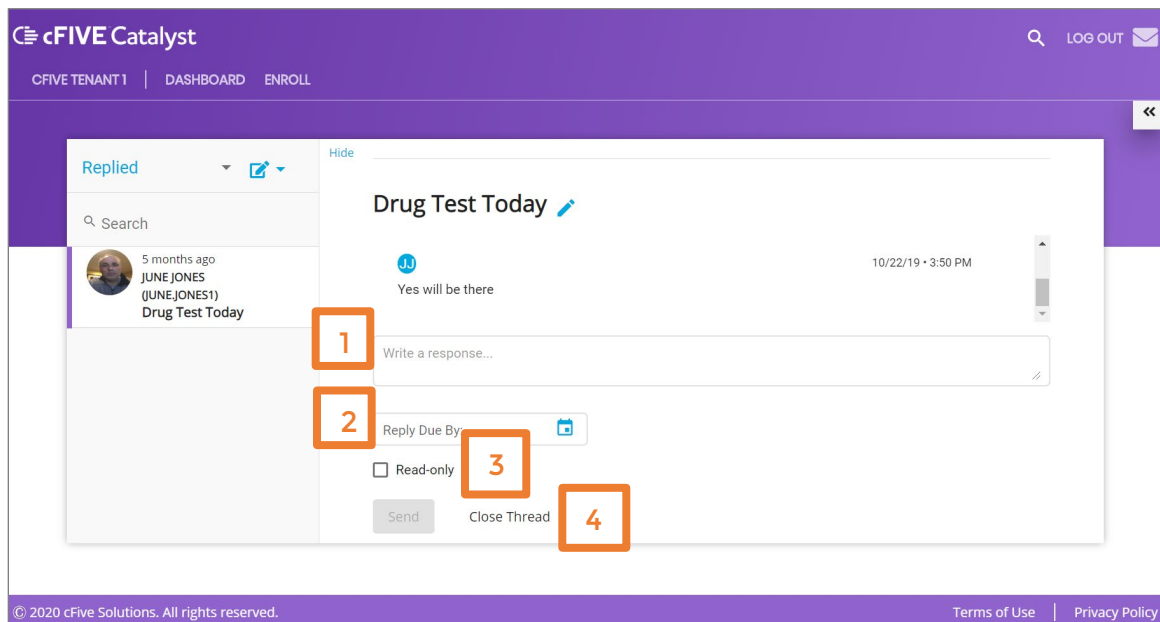
Options to Send Messages to Individuals and Groups

The Messages queue of Catalyst provides two additional message-sending options. Here Users can quickly send messages to individual clients and groups (such as one or more caseloads or multiple clients). A "group" consists of all of the clients in a Users' caseload.

When clicking on the pencil icon, the drop-down menu provides access to compose and send "**Messages**" and "**Announcements**".
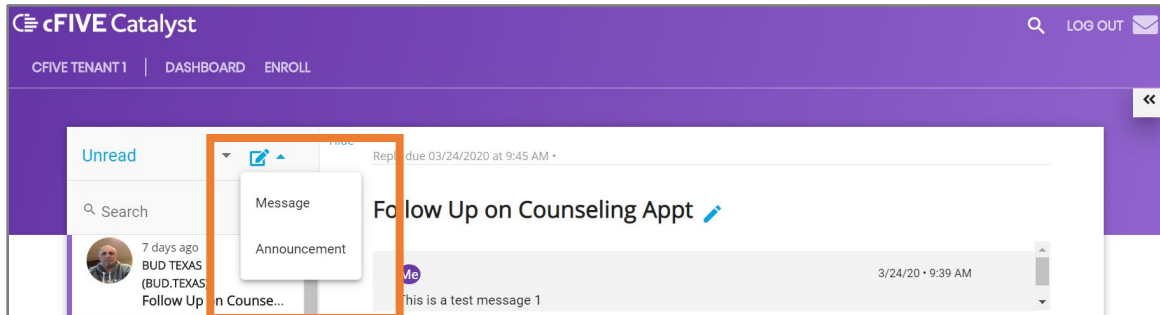
NOTE: Sending a Message and an Announcement use the same format, with one key difference: "**Announcements" have the "Read-Only" box already checked**.

Sending a New Message to a Group

Clicking on "Message" from the drop-down menu allows users to compose a message. From here you can send messages to one individual client, a caseload or a combination of individuals and caseloads.
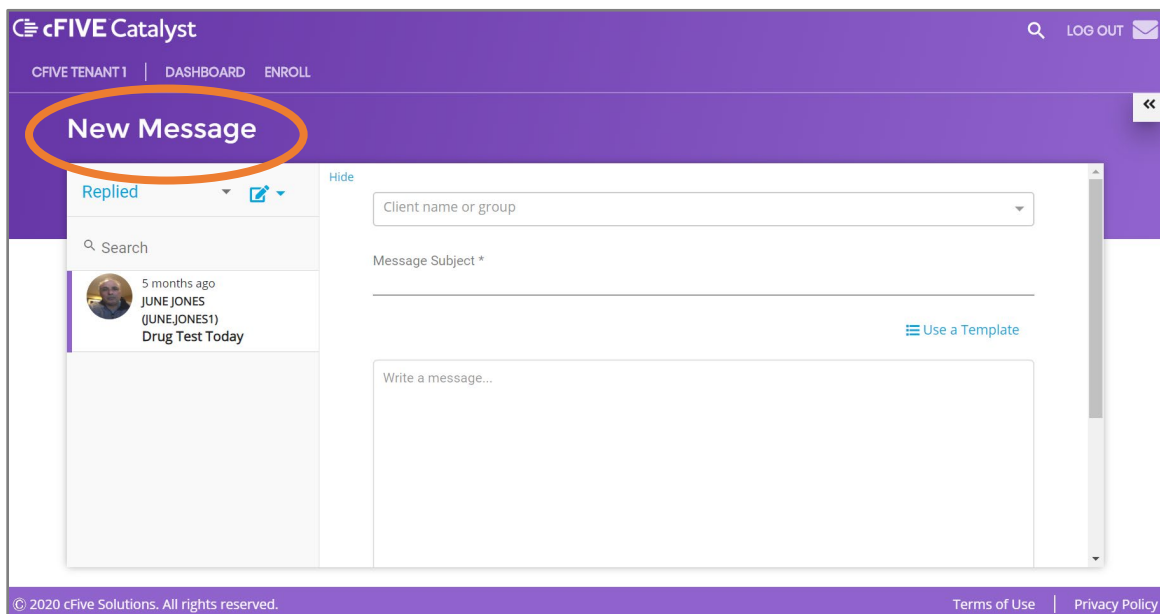
The form to compose the message is designed similarly to the other message areas within Catalyst, and contains several fields, content boxes and buttons:

- Client name or group
- Message Subject
- Write a Message
- Reply Due by Date
- Read-only Check box
- Use a Template
- Save as Template
- Send / Cancel

NOTE: For step-by-step instructions to compose and send a message, please refer to the "Messaging" section of the Quick Start Guide.

Choosing Your Message Distribution List

The "**Client name or group**" field provides a drop-down menu to enable you to select individual client names and caseloads.

Sending to One or more Clients

The "**Clients**" button displays the client list. Simply click on a Client's name to add them to the message distribution list.
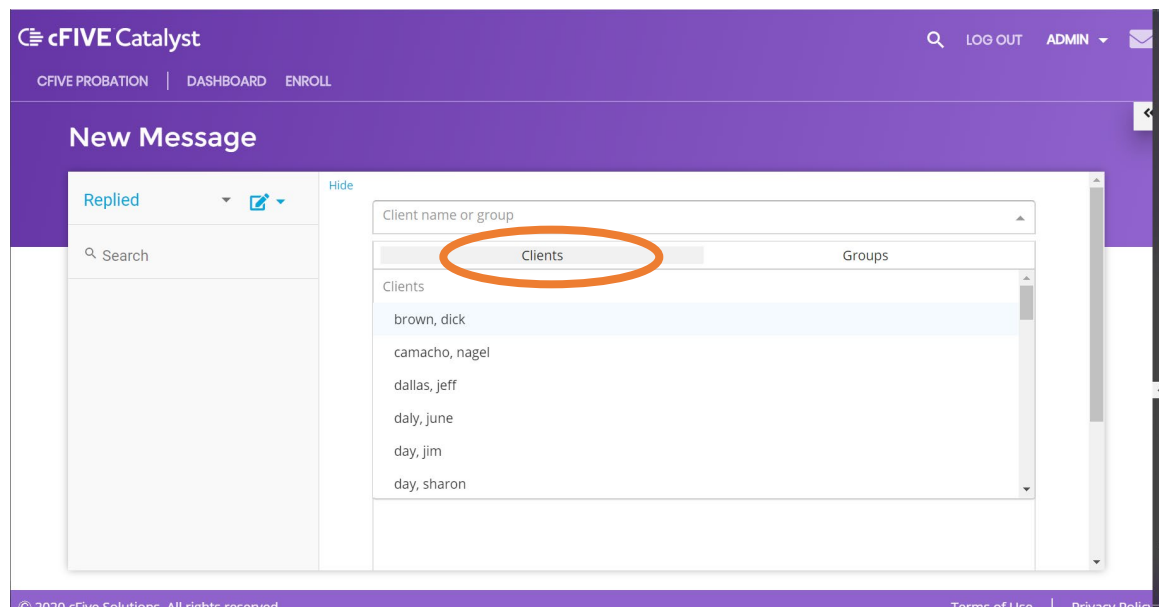
The **Clients** that have been added to the message distribution list will be displayed in blue in two areas: the top "Client name or group" field area will have their name in a blue box, and the line that contains the client's name in your caseload list will be highlighted in blue.
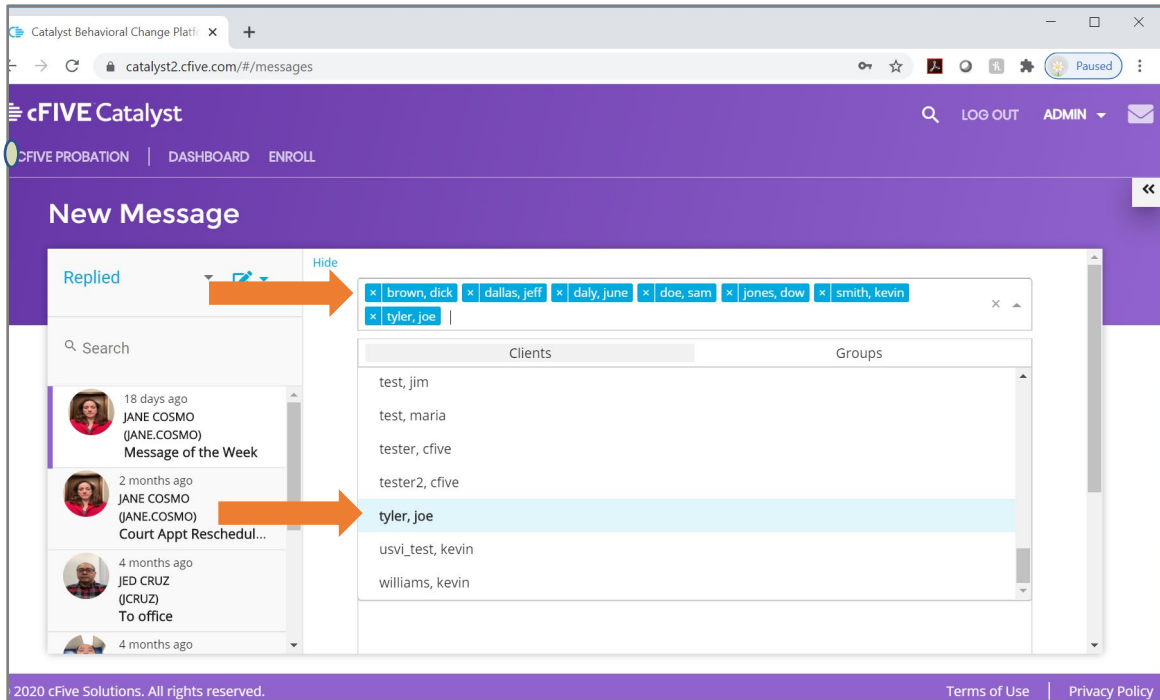

To remove a single name from the distribution list, **simply click the "X"** on the left-hand side of that specific name field in the top box.
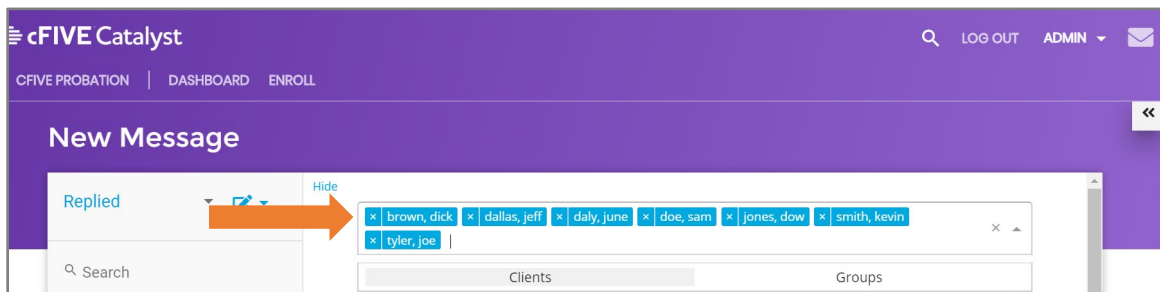
## Sending Group Messages to Caseloads

Users can send messages to one or many caseloads using the "**Groups**" button. When you click on the "Groups" button the list of "Users" (Case Managers) will be populated in the list. By clicking on a name from the names in the list you select the caseload that is associated to that User/Case Manager. The Case Manager's name will be displayed in the distribution list (the "Client name or group" field at the top of the New Message screen).
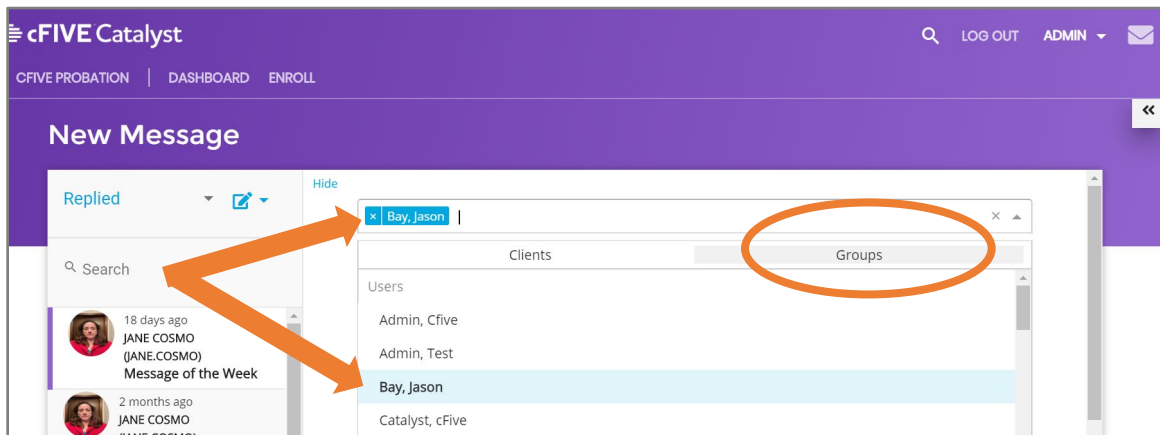
Users can send to one or many Clients, *or* one or many Groups. NOTE: Users cannot send a message or announcement to a group that contains names from a combination of names from the Clients list *and* the Group list.

Templates

Using a Template. Similar to other areas within Catalyst, this Message area allows you to access Templates you have already created (by clicking on the "Use a Template") option.
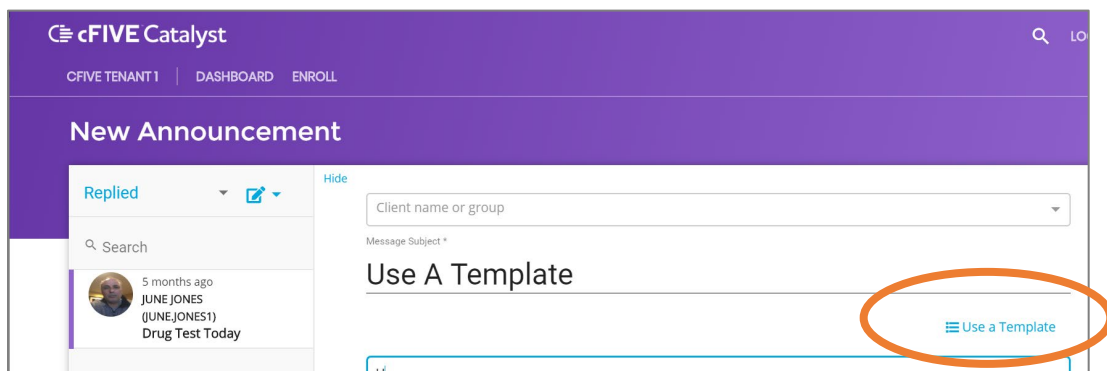
Save as Template. You also have the option to save a newly created messages as a Template for future use (by clicking on the "Save as Template" beneath the message content box.)

Creating A New Announcement

As stated previously, there is one key difference between "Announcements" and "Messages", and that is that **"Announcements" have the "Read-Only" box already checked**. Announcements are designed in this way because they are typically messages that are intended to provide information that case manager's do not require a client reply (such as "the office is closed due to weather", a reminder for Daylight Savings Time, etc.).
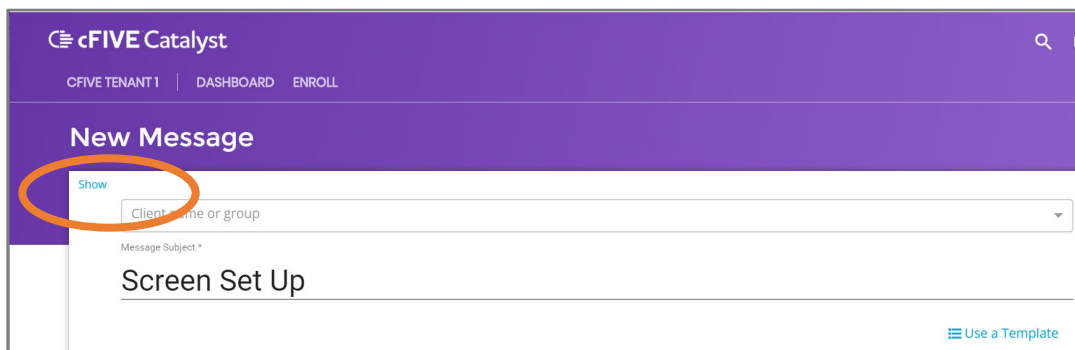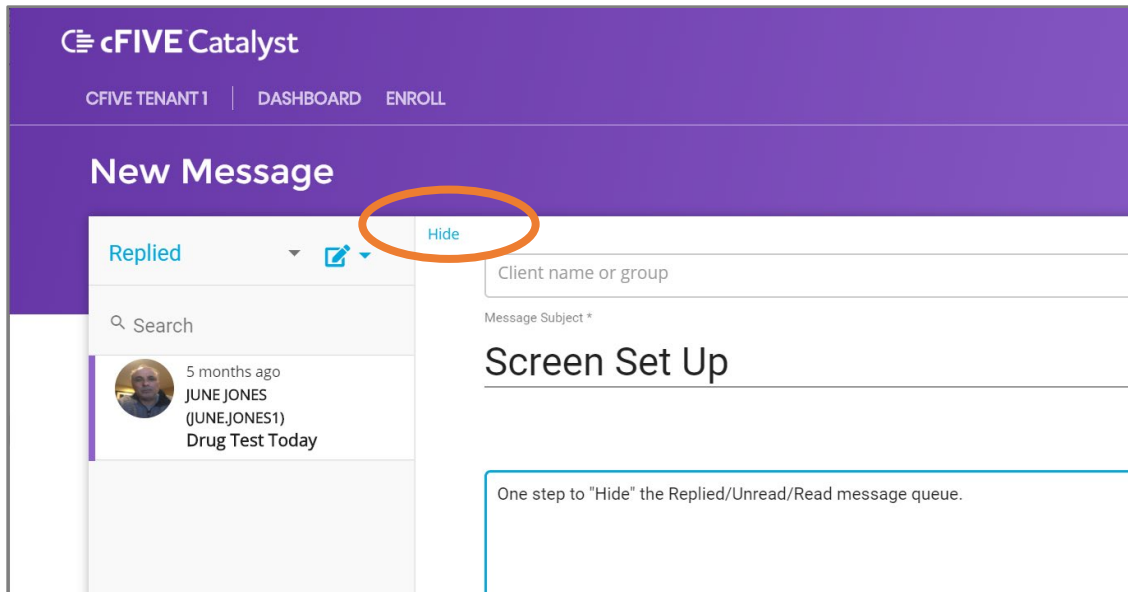
New Messages/Announcement Hide Option

When creating a New Message or a New Announcement you have the option to "Hide" the column that shows the Replied/Read/Unread message queue. This will expand the message composition area so that it fills your screen.

To Hide the Messages activity queue, simply Click on the blue "Hide" label:

Click the "**Show**" label to display the Message Activity queue again. You can toggle between "Hide" and "Show" as desired.