



## cFive Catalyst Launch Plan



**Data-driven  
Outcomes**

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## INTRODUCING CATALYST

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As you roll out Catalyst within your agency, engaging officers and clients are the keys to your success. You have already taken the important first step of selecting cFive Catalyst to help you and your team empower your agency, officers and clients. Congratulations!

First and foremost, Catalyst serves as a personal assistant for both case managers and clients – helping to increase communication, provide critical information, and enable the user to be more efficient.

Catalyst will help your case managers more efficiently and effectively supervise clients by giving them the ability to configure interactions to fit individual client needs and increase client interactions without additional travel or meetings. And, unlike traditional supervision tools, Catalyst’s automated updates, verification of client information and triggered notifications for non-compliance enables staff to focus on clients with the greatest needs.

Catalyst helps clients become more engaged in their supervision and provides the information they need to be successful. The 24/7 access to their schedule ensures they remain on top of their supervision requirements. Secure messaging helps them keep informed and in touch with their case manager. Questionnaires provide a way for clients to keep case managers apprised of their supervision efforts, and provides case managers valuable insight into client needs

At this phase of your implementation your agency should be familiar with Catalyst and your stakeholders and primary case managers should be trained.

### CATALYST DEPLOYMENT PLANNING

As you plan your roll out of Catalyst, the following are some action items and other topics for discussion within your agency to help facilitate a smooth implementation.

#### User Set Up

- Identify who will be your Catalyst “Users” (the case managers and administrative staff who will be using Catalyst)
- Identify who will be designated as system “Administrators” [the staff member(s) responsible for managing the Catalyst system, with responsibilities that include adding Users, inputting questions and creating new questionnaires]



- Who will be responsible for managing Users and Admins (adding and deleting Users, helping with locked out logins)
- Determine if you are going to have an agency-wide password policy

### Appointment Set Up

- Frequently Used Addresses (for display in the Appointments drop-down menu)

### Questions/Questionnaires

- Identify a questionnaire naming convention.
  - o What differentiating terms/coding do you want to use to delineate questionnaires for different caseloads, departments, etc.
  - o Are you going to identify with the frequency in the name (Weekly, Monthly, etc.)
- Which answers are “Compliant” vs “Non-Compliant”? Which answers should trigger a Follow Up – “Non-Compliant” answers show up in case manager’s follow up list.

## INTRODUCING CATALYST TO CLIENTS

Catalyst is an investment in the success of your agency as well as the well-being of your clients and your community. With that in mind, it is important to take the time to introduce Catalyst to your clients and support them through their Enrollment process. The following provides an overview of best practices to effectively inform your clients, promote buy-in and increase engagement.

### Step 1: Thorough Client Communications

Helping your clients understand how Catalyst works, what it can do for them and how it will enable them to be successful in their supervision lays the groundwork for strong client engagement. As you are adding a new Client to your Catalyst caseload, it is best to discuss this with them so you can introduce the program and answer any questions they may have. **We recommend a “live” phone conversation where you talk directly with them.**

You’ll want to cover the following items:

- 1. What’s Catalyst?** It’s a new supervision program you are rolling out to help them successfully complete their supervision.
  - o Catalyst is a mobile app that they will download on their smartphone (iPhone or Android). It will help them manage the



various aspects of their supervision (such as court appointments, program responsibilities and conditions).

- There are three different components of Catalyst:
  - Appointments – provides them notices and reminders of their appointments, as well as directions.
  - Messages – provides the ability to keep in touch with their case manager and receive messages to help them become informed of important things that they need to know. (Such as changes in probation office hours, new practices for coming to court, etc.)
  - Questionnaires – help them share information with their case manager about what they have been doing in regards to their case plan and court conditions.
- They have been selected to participate in this program because you think it will help them be more successful with their supervision, and help teach them new habits.
- Catalyst allows them to be able to complete some of their supervision requirements remotely using the Catalyst Mobile App. This will save them a great deal of time and costs related to the need to take time off of work, find childcare, etc. as they travel to your facility.
- And now, during the COVID-19 pandemic, Catalyst provides them a way to maintain social distancing and avoid the large groups of people attending roll call sessions and waiting rooms.
- Catalyst is an investment in the client’s success, and it’s a privilege to be able to participate in this program. If at any time they are not responding as requested it can be revoked.

## **2. How it works and what to expect.**

Enrollment: Clients will be Enrolled in Catalyst using their smartphone. To begin the client will receive a SMS/text message. The Message will contain:

- Reference to your agency and “cFive Catalyst”.
- Direct links to download the Catalyst App using the iOS (iPhone) and Android App Stores. The client should use the link that corresponds to their phone type to download the Catalyst Mobile App on their phone.
- The client’s “Username.” This is what they will need to use to login to Catalyst once they get it loaded on their phone. It is typically the client’s first and last name, with a dot/period in between. For example, “TEDDY.WINSTON”. Note: Catalyst user names are NOT case sensitive,



so when the client logs in to Catalyst, they do not have to use all capital letters. However, they DO have to put the period/dot between their first and last name

As the case manager talks to the Client about Enrolling in Catalyst, it is a good idea to send the SMS/text message from Catalyst while on the phone with them to verify they received it. (Note: if they are on their cell-phone they will not be able enroll until you have completed your call).

If they don't get the text, walk them through the download\* and give them their Username/ID. It is also important to clearly define your expectations to your clients of the time frame in which you expect them to respond to the Catalyst activities. (For example, you might tell them the approved/recommended time frame in which you expect them to respond is one-hour, two-hours, not more than X hours.)

*\*See Page 6 for Steps to Help Clients Download the Catalyst App.*

### **3. The Enrollment Process -- Case Manager and Client Steps**

The following outlines the flow of the Enrollment process, and shows the steps that both the Case Manager and Client need to complete for a successful Enrollment.

The Case Manager begins the Enrollment process in the Officer Portal of Catalyst. To start, the case manager begins a "New Enrollment." The case manager should complete Steps 1 and 2 of the Enrollment. At that point it is best to stop the enrollment for that client, and contact the Client (via the phone). We have found it can be helpful to be on the phone with the client when they receive the SMS/text message. Here's how to do that:

1. Start the Catalyst introduction phone conversation between Case Manager and Client.
2. As you are on the phone with your client, after you have explained what the client needs to know about Catalyst, the case manager should proceed to "Step 3" of the Enrollment process. Now is the time to assign yourself as the case manager and hit "**Save.**" Hitting "save" is the trigger for Catalyst to send your Client the SMS/text "welcome" message. While you are on the phone with the client, you can confirm that the Client receives the SMS/text message on their phone. (If the client does not receive the text you can troubleshoot any potential causes using tips outlined later in this document.)

Note: Please be aware that the client will not be able to continue the Enrollment process if they are talking on the same phone that they need to use to login to Catalyst. However, if they are talking with you on the phone you can confirm they received the SMS/text,



share with them the next steps and help them understand what to expect.

3. When the client receives the SMS/text: Using the links in the message, the Client will need to download the Catalyst Mobile App. It is best to download it directly from the link provided in the text message. (Note: in the App Store, the title of the Catalyst app should say “Catalyst 2.0” – NOT “cFive Catalyst”.)
4. Next, the Client opens the Catalyst icon on their smartphone and completes the tasks of the guided enrollment process. It will ask them to take a picture of themselves and provide three samples of their voice. Once these two steps have been completed successfully, the client will receive a notice telling them they have been successful. Note: the client will not be able to login to Catalyst successfully again until the Case Manager has approved their Enrollment.
5. In the Catalyst Dashboard, the Case Manager will check the “Enrollment” screen to see the status of the client’s Enrollment. Once the Client has submitted their photo and voice biometrics, their status on the Enrollment screen of the Case Manager’s Dashboard will change from “Pending Client Biometric” to “Requires Verification.” At that point the Case Manager should go into the Client’s Enrollment process (by clicking on blue pencil beside the client’s name), approve the client’s photo and complete the Enrollment process. Note: a client will not be fully enrolled UNTIL the case manager has clicked the “Complete Enrollment” button in “Step 5. Questionnaire”.
6. Once the Case Manager has completed the Client’s Enrollment, they should send a “welcome” message to the client (using the “Message” component of Catalyst). The message should ask the client to reply to the message so that the Case Manager and the Client can both see how messaging works. (A welcome note template is already created in your system for you to use or modify.) Note: a Client will not be able to initiate a Message in Catalyst until the Case Manager has first sent them a message.



## STEPS TO HELP CLIENTS DOWNLOAD THE CATALYST MOBILE APP

*Client's do not need to receive the SMS text to be enrolled in Catalyst – they simply need to download the Catalyst Mobile App to their smartphone and login.*

### Steps:

#### 1) **Explain the process to the client.**

- ✓ You should explain that they will need to download the app to their phone, and then login to Catalyst to begin the Enrollment process. NOTE: The client cannot talk to you on the same phone while they download the app and login.
- ✓ Make sure to discuss with them that they will need to allow Catalyst to send them notifications and have access to their microphone and camera. (This is required.)

#### 2) After you have done that, you can **help the client download the Catalyst app:**

- A. Have the client go to their smartphone's App Store and search for "**Catalyst 2.0**". Catalyst 2.0 is available in the iPhone and Android App Stores. (When installed, the icon is a purple "hand" on with a black background, with the words "Catalyst v2.5".)
- B. Give your client their "**Username**" – that is the ID that they will use to login to Catalyst. This is typically their first name, dot/period, and last name. For example: "Wilma.Smith"
- C. Note: When entering the username into the Catalyst app, the letters are not case sensitive, and can be any combination of upper- and lower-case letters. However, please note, the client must use the period/dot between the first and last name.

3) Once the client has downloaded Catalyst, and you have given them their username they can login to Catalyst and **begin the Enrollment process**. (You might want to explain to them that they will not be fully enrolled until you, their case manager, has approved their biometrics.)



## HELPFUL TIPS FOR TROUBLE SHOOTING

### Mobile Application

- Catalyst is a Mobile App that works using smartphones -- iPhone or Android phones.
  - Catalyst is designed to use to the most stringent security protocols available and It works best on newer phones. These are the minimum phone operating systems:
    - ANDROID: Version 6, Marshmallow from October 5, 2015 and above
    - iOS: iPhone 6s or above with the latest iOS operating system 10
- To receive these messages, Clients will need to check their settings to make sure they do not block unknown numbers.
- Catalyst uses two-factor authentication, and will require the client to login using facial and voice recognition each time. That means that the client will need to allow Catalyst access to both their camera and microphone (typically the client's phone will display two separate pop up message box that asks them if they allow Catalyst access to the microphone and camera).
- The first time the client enrolls in Catalyst, Catalyst will send a series of requests that the client must accept:
  - 1) "Catalyst would like to send your Notifications."
  - 2) "Catalyst would like to Access the Microphone."
  - 3) "Catalyst would like to Access the Camera."

Note: The Client MUST allow Catalyst access to these components when prompted during the enrollment process. If they do not, they will not be able to use Catalyst, and Catalyst will not function properly on their phone.

### Officer Portal

When agencies and case managers access Catalyst using the Desktop Portal, cFive suggests using the "Chrome" Browser. (Due to outdated and unsupported security protocols, Catalyst will not work using the "Internet Explorer" browser.)