cFive Catalyst
Quick Start Guide

Client Enrollment, Unenrollment and Reenrollment

Data-driven
Outcomes

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INTRODUCTION

This Quick Start Guide provides step-by-step instructions to get started with cFive Catalyst including information about Client Enrollment, Unenrollment and Reenrollment. Also provides a chart that explains each of the Enrollment Status' and related next steps.

Additional Learning Resources

cFive provides a library of learning resources at our website at:
https://www.cfive.com/catalyst-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.

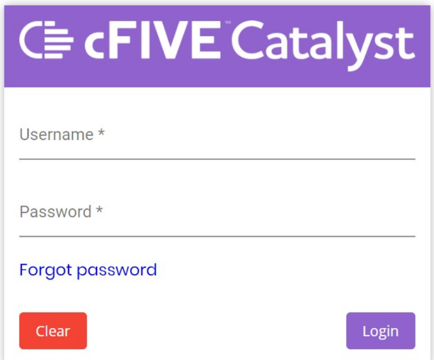
Minimum Phone Operating Systems Supported

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

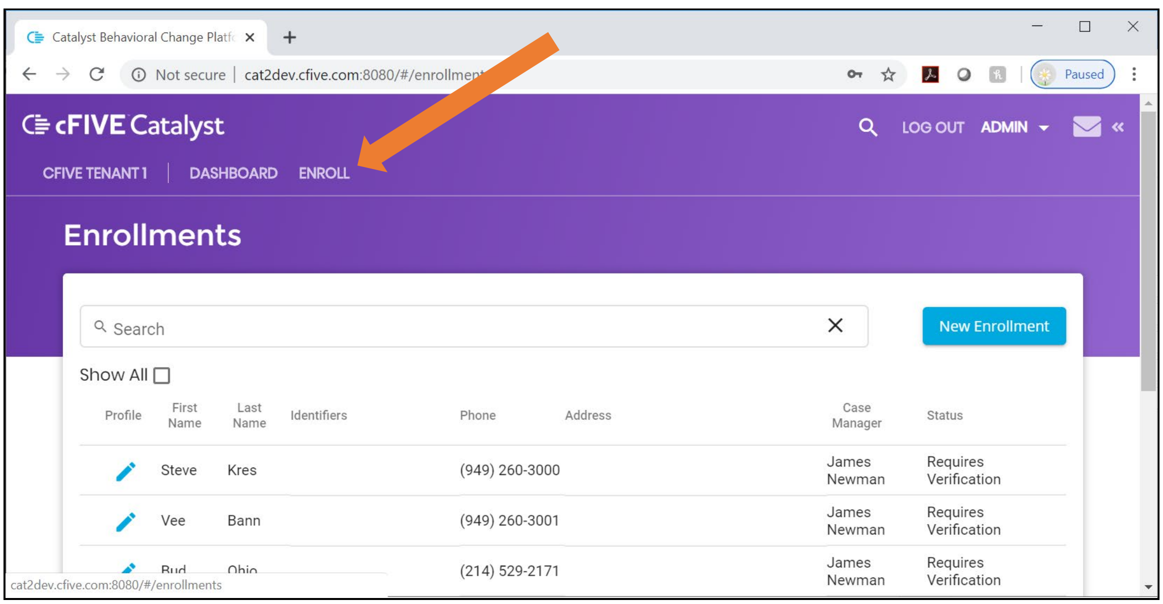
iOS: iPhone 6s or above with the latest iOS operating system 10

Step 1: Login to cFive Catalyst



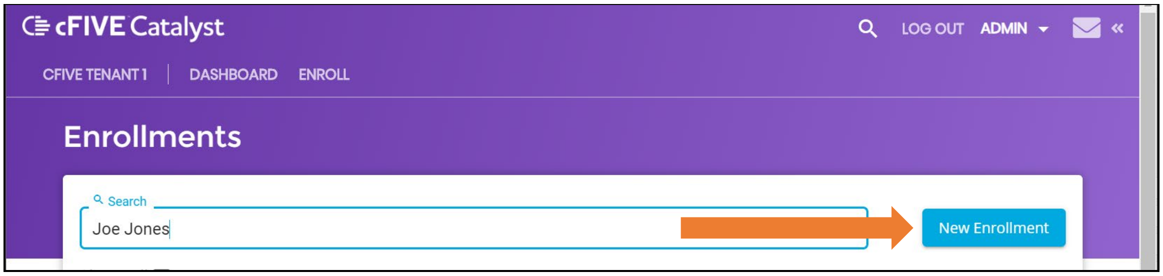
Step 2: Navigate to the "Enroll" screen

1. **Navigate to the "Enroll" screen**.

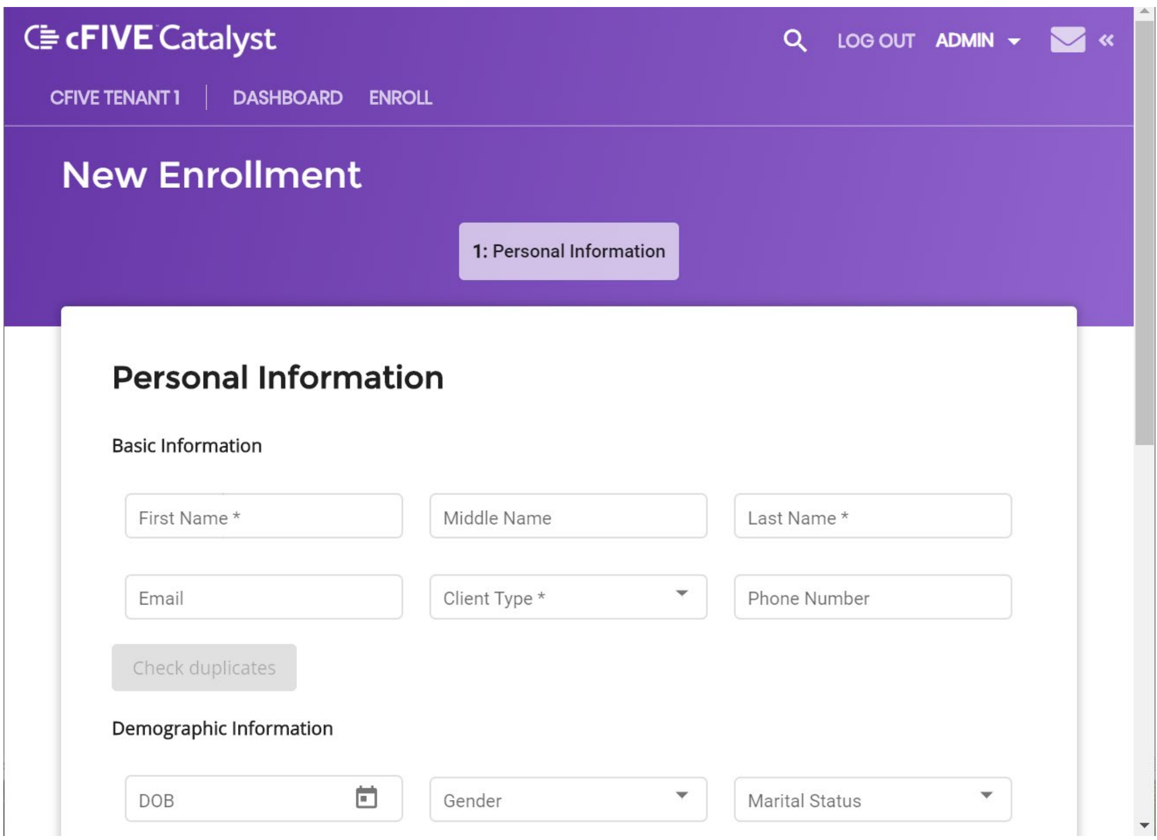


Step 3: Enroll a New Client (New Enrollment)

1. Click the **New Enrollment** button.



Enter Basic Client Information

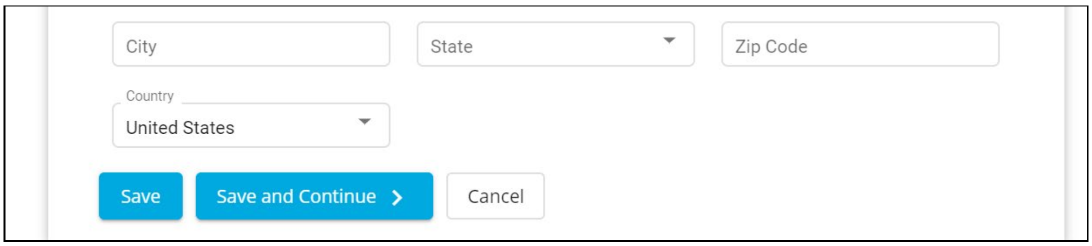


1. On the **Personal Information** screen, enter all the required data:
   - **First Name**
   - **Last Name**
   - **Client Type**
   - **Phone number**

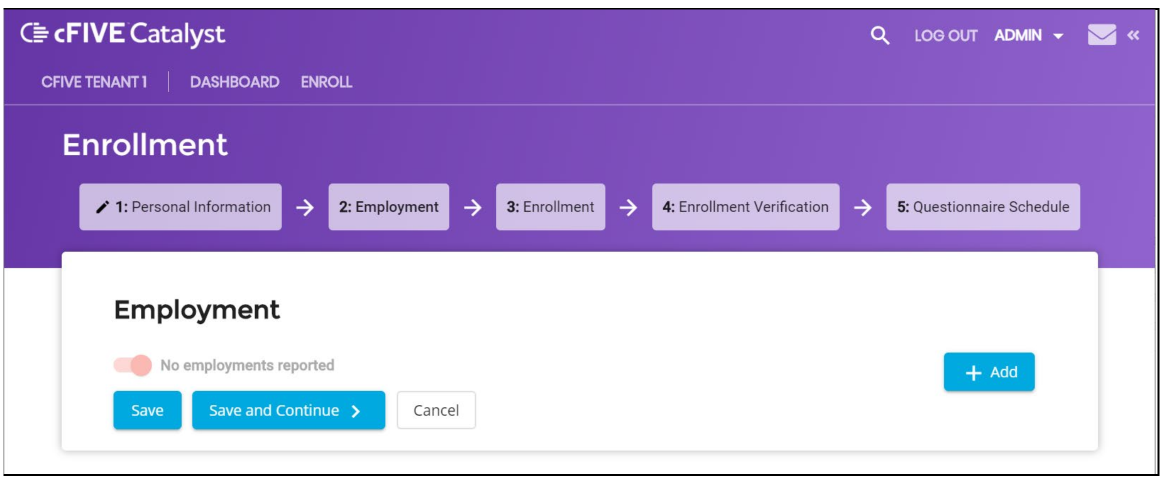
2. When you are done entering the client's first name and last name the "**Check Duplicate**" button will become active to allow you the ability to check to see if the client is already in the system. Additionally, when you enter the client's mobile number you can check it again, and it will use the phone number as an additional filter to check for duplication.

3. Note: You and your agency should determine which other information should be entered. The additional information provides more data for reporting purposes.

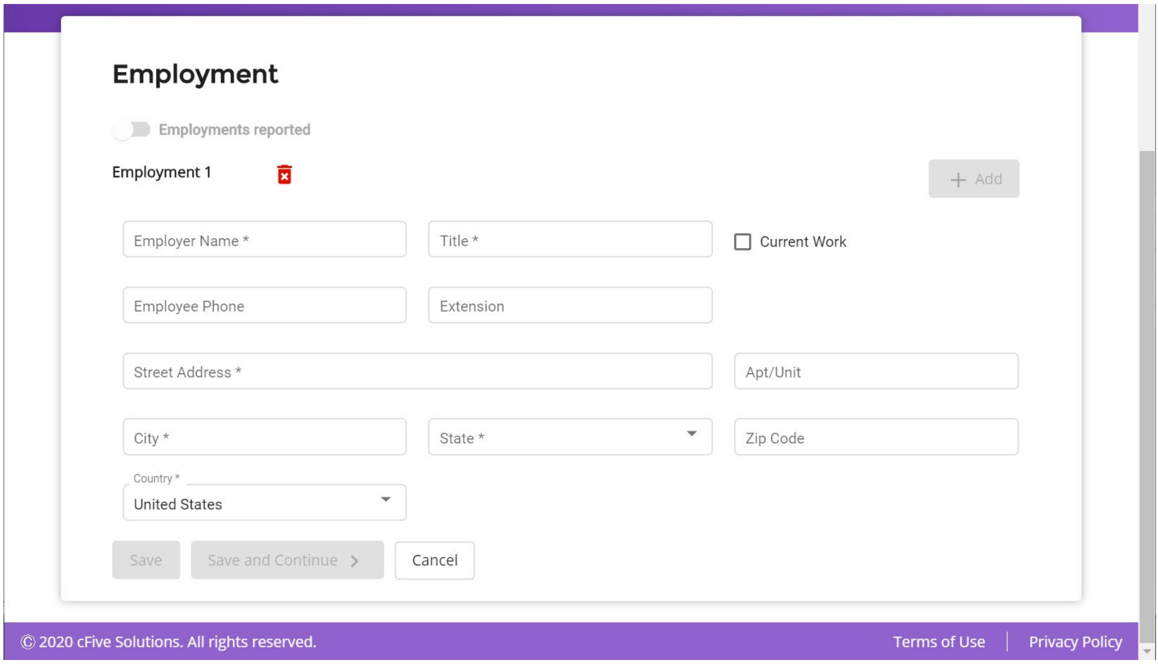
4. When you have entered the desired information, select the blue "**Save and Continue**" button at the bottom of the page:



5. **Enter Employment information** (if desired).

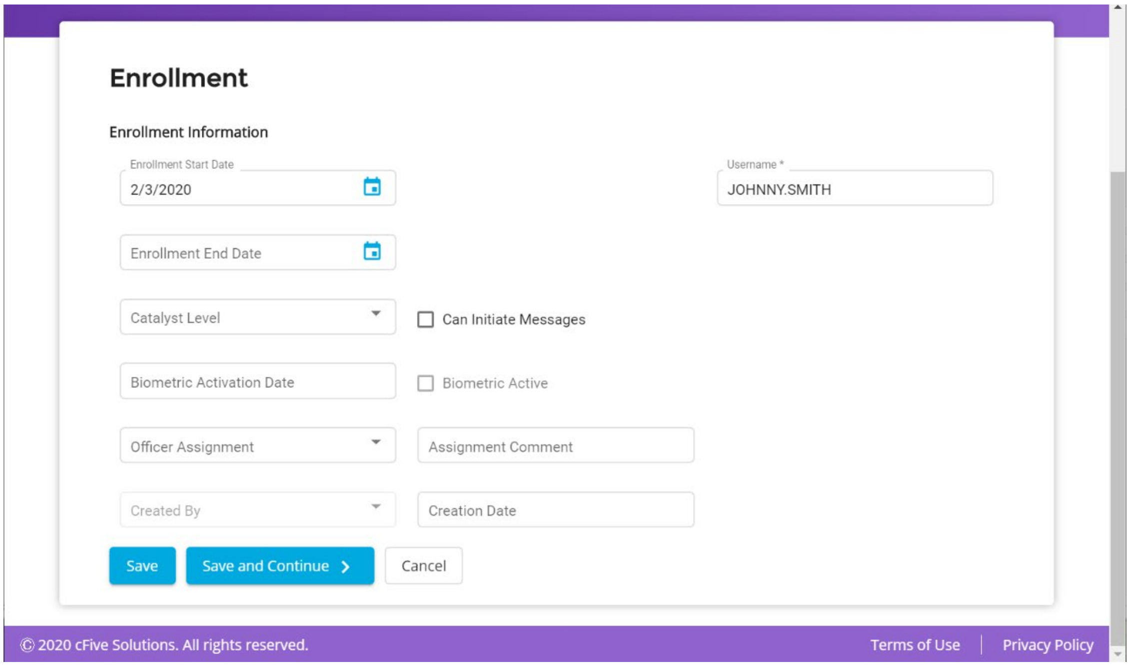


6. You can advance to the next screen without entering any information, or select the "**+ Add**" tab to input this information.

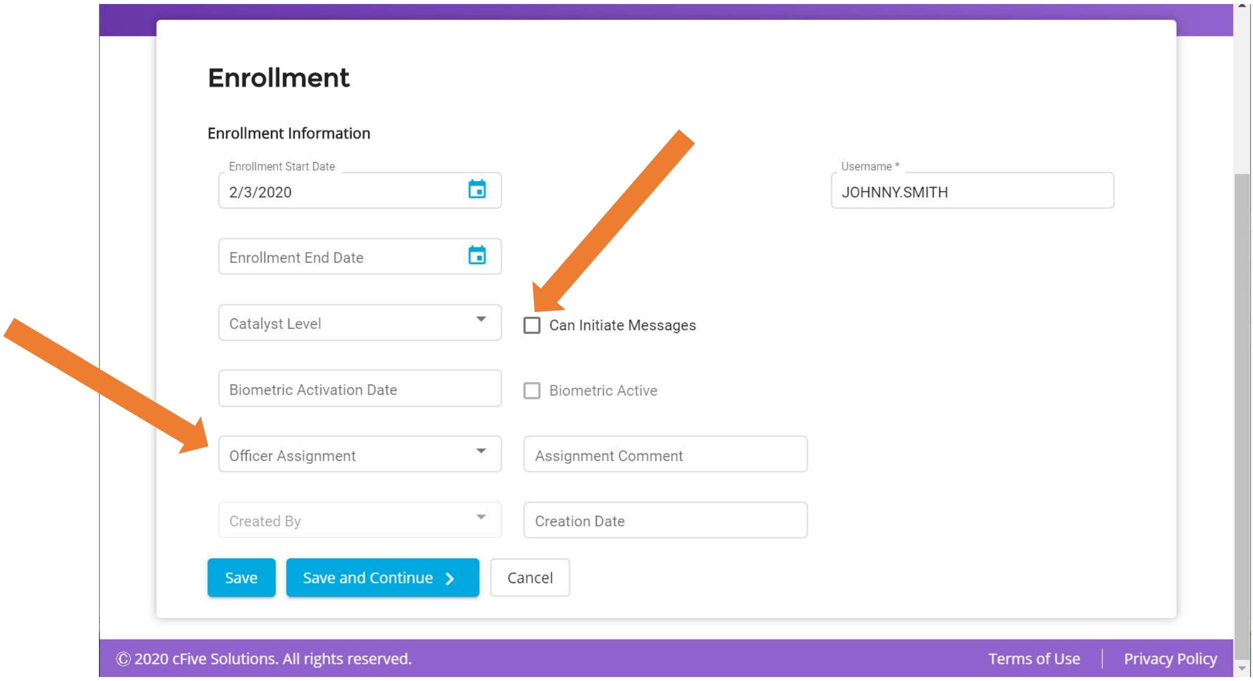


7. When you have completed your work on this screen, select the "**Save and Continue**" button.

8. You will next be taken to the **Enrollment screen**. This screen tracks important elements related to the client's enrollment, including:
   a. **Enrollment Start Date**
   b. **Enrollment End Date**
   c. **Officer Assignment**



9. Catalyst will select today's date as the default date for the "**Enrollment Start Date**." You may change that date.

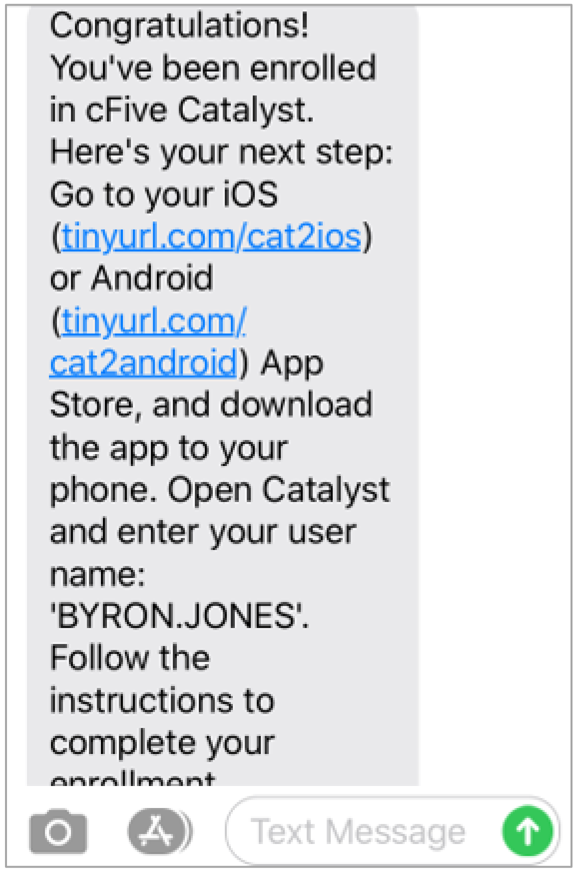


10. The orange arrows above identify two areas that you will want to make sure you complete on this screen:
    a. The "**Can Initiate Messages**" box. You will want to check this box if you want the client to be able to initiate a text message with you (the officer and/or case manager).
    b. "**Officer Assignment.**" You must choose a name from the "Officer Assignment" drop-down menu to assign the client you are enrolling to the appropriate case manager/officer.

11. Once you have entered this information, select "**Save**" to save your data and then click on enrollment to return to the enrollment menu.

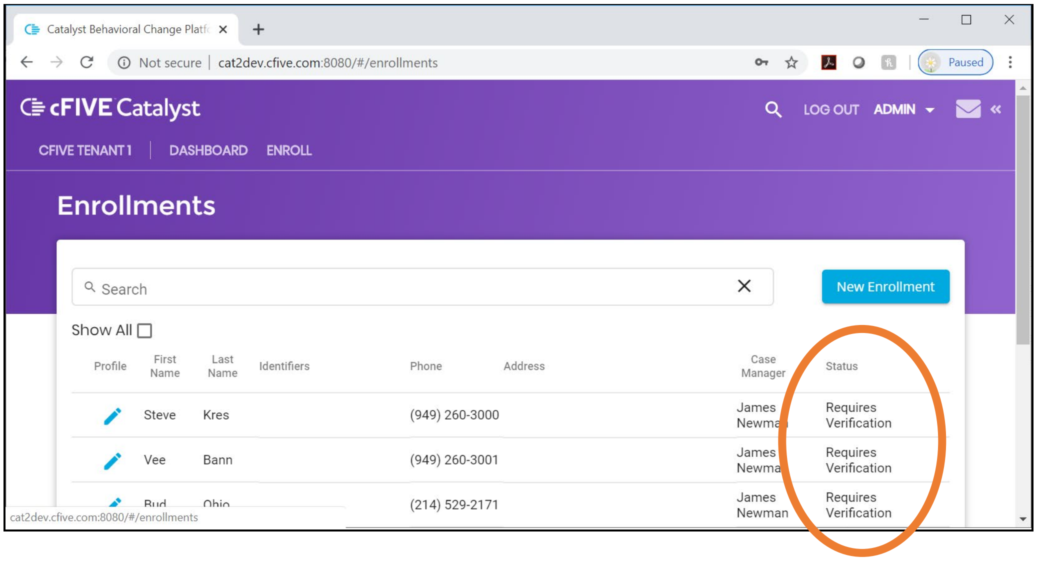
12. Catalyst will send the Client a SMS text message that includes a link to download the Catalyst App and their Login ID.

    NOTE: It is a good idea to remind the client that they must enter their user name as it is provided in the text/SMS message (including the period between first and last name).



Step 4: Enrollment Verification

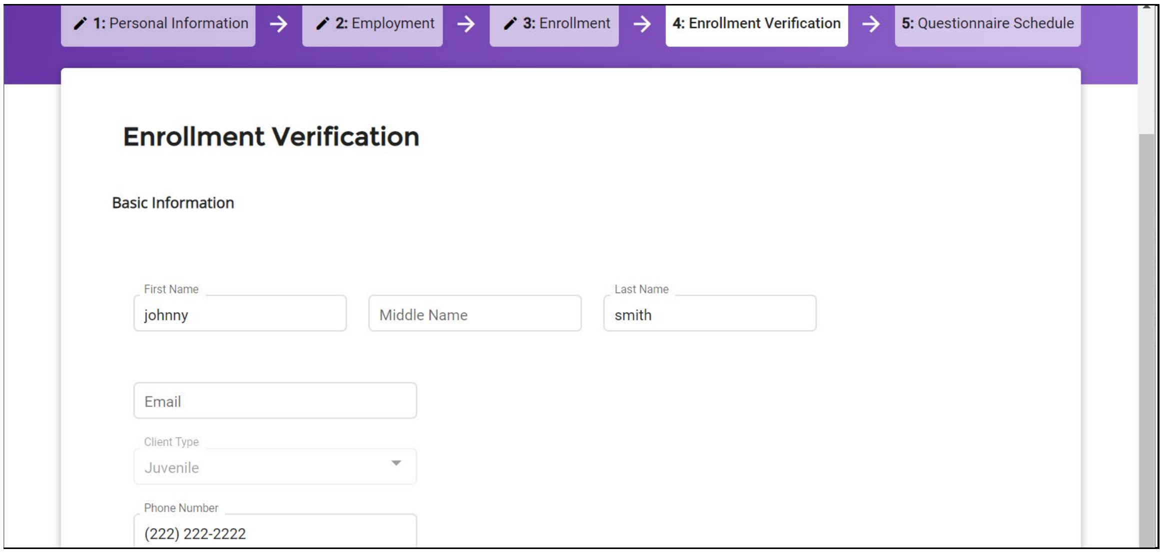
1. Click the **New Enrollment** button.



2. Click on **Status** column and scroll down to the clients that show a status of “**Requires Verification**.”

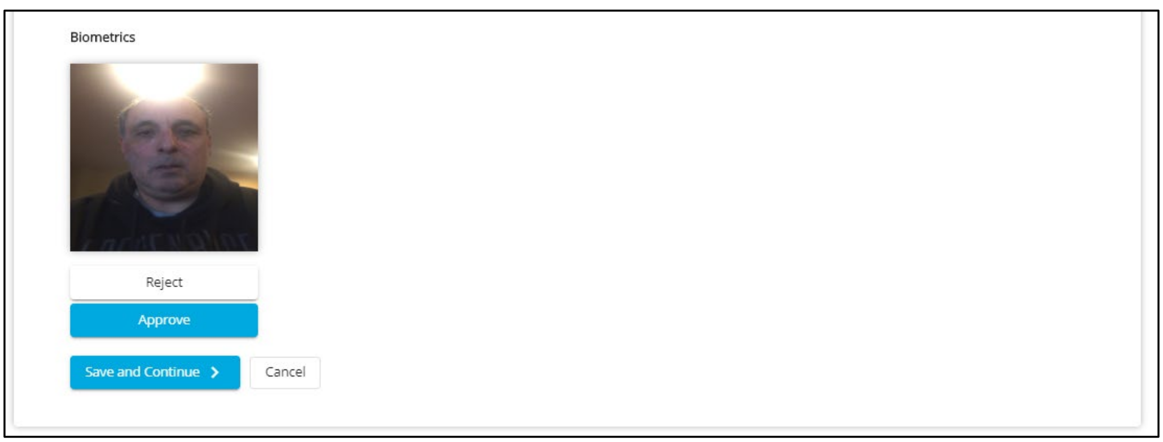
3. Click on the blue pencil next to the name of the client you want to verify and the system will take you to **Step 4 Enrollment Verification**.

4. When the client has submitted a biometric you will advance to the **Enrollment Verification** screen:



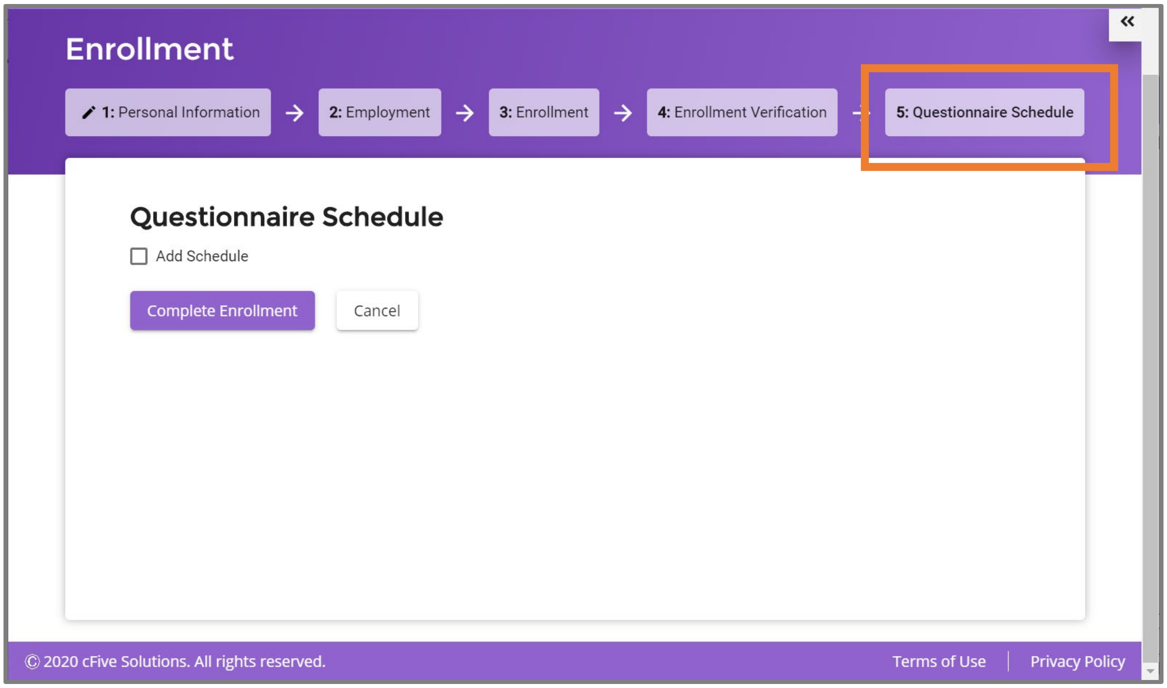
5. Verify Client Information (including photo). This screen gives you an opportunity to check the spelling of your client's name, email address (if entered), Client Type and Phone number.

6. Verify Biometrics (Photo). This is also where you verify the photo the client has entered using their smartphone. When the client has taken their photo with their smartphone through the Catalyst App it will be displayed here. You can accept or reject the photo here.

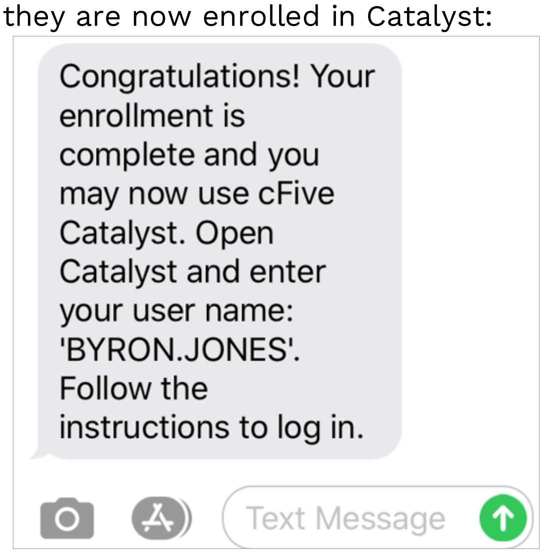


Step 5: Questionnaire Schedule and Complete Enrollment

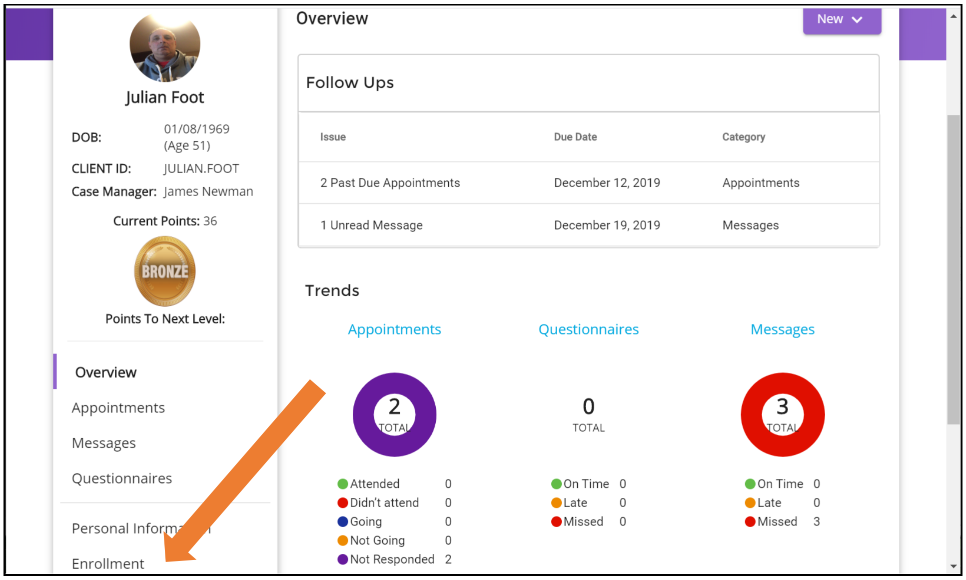
The last Enrollment screen, "**5: Questionnaire Schedule"** serves two purposes: 1) You can set a questionnaire schedule, and 2) this is where you complete the client's enrollment. Regardless of if you choose to schedule a questionnaire, you must complete the enrollment to ensure that the client is fully enrolled and able to take advantage of all Catalyst functions. To finalize enrollment, click on the "**Complete Enrollment"** button on this page:



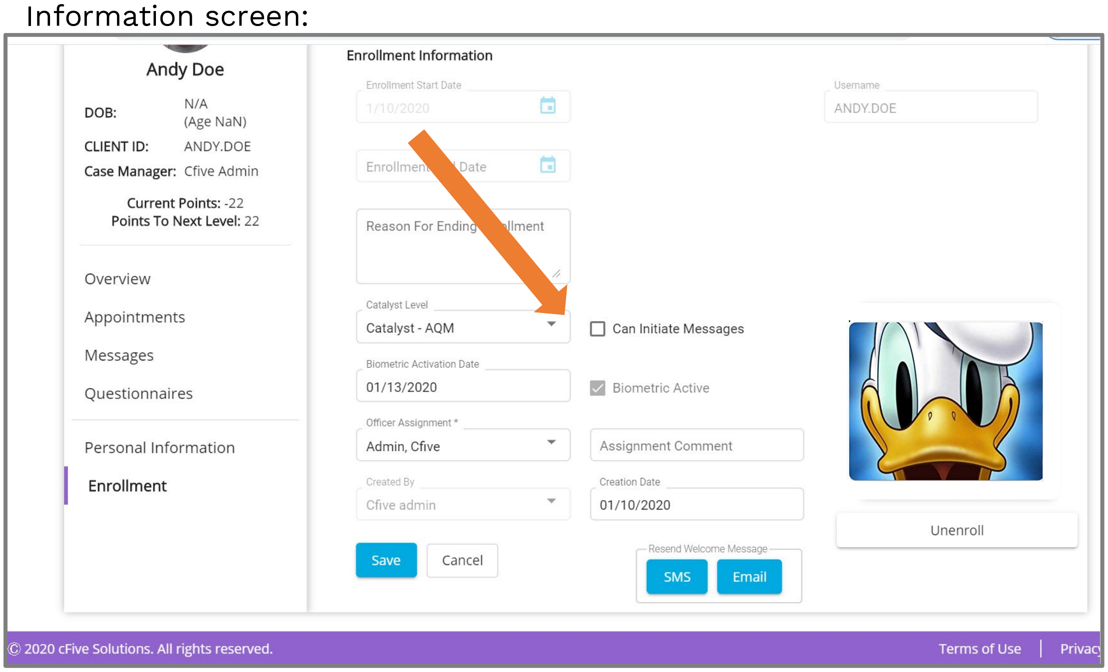
NOTE: Once the case manager has completed the Enrollment (Step 5), Catalyst will send the Client a SMS message to their smartphone device informing them that they are now enrolled in Catalyst:



TIP: Once a client has been enrolled, you can check the details of their enrollment information by selecting the enrollment option on the bar on the left-hand column.



When you choose "**Enrollment**" you will be taken to the Enrollment Information screen:



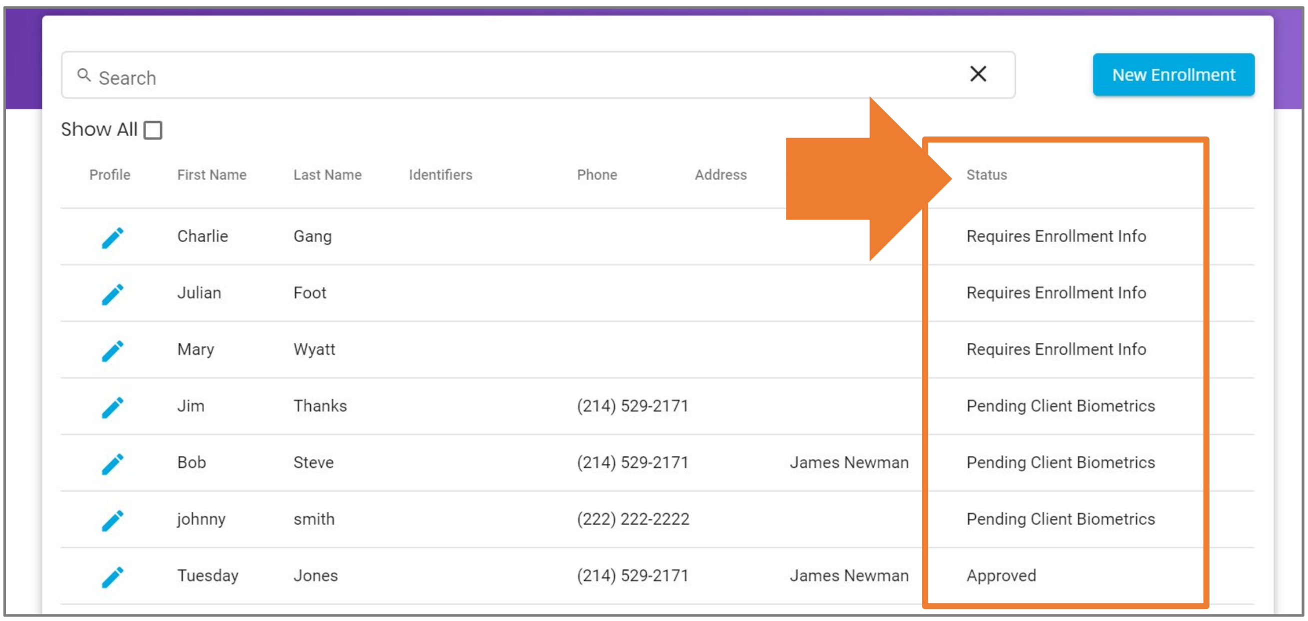
1. Here you can easily change the "**Can Initiate Messages**" setting. (Top arrow.)

2. You can also **Unenroll a client** from this screen. Go to "Unenrolling a Client" within this Guide for step-by-step directions.

Using the Enrollment Status Indicator

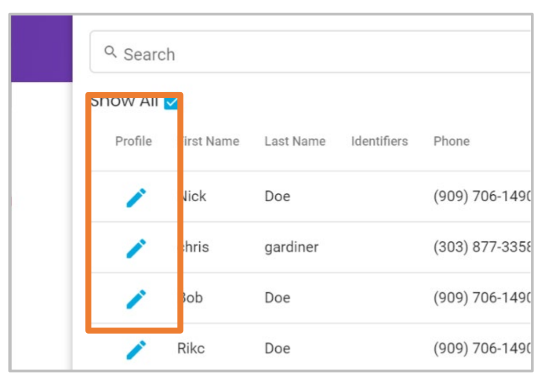
The "**Status**" column on Enrollment Screen provides you an at-a-glance reference to the specific phase the Client is in within the Enrollment process. NOTE: The "**Enrollment**" screen provides you the list of clients that have not been fully enrolled in Catalyst. (When a client is "Enrolled" in Catalyst their name will not be displayed in list on the Enrollment screen.)

The column that displays the "Status" gives you a quick reference as to what needs to be done to advance the client through the Enrollment process.



QUICK TIP:

Clicking on the Blue Pencil icon to the right of the Client's name, will take you directly to the phase in their Enrollment that needs to be addressed.



Status Definitions

Status	Description
Requires Enrollment Information	The Officer has started the Enrollment process through the Officer Portal, but they have not provided enough information for Catalyst to send the “trigger notification” to the Client’s mobile phone (via SMS, text). **NEXT STEP:** Officer should go to Enrollment screen, and complete Steps 1 through 3.
Pending Client Biometrics	The Officer has begun the Client Enrollment process by putting in key pieces of information to trigger the Catalyst invitation notification to the Client. This status indicates the Client has not logged into Catalyst on their smartphone and completed the steps to enroll from their phone. **NEXT STEP:** Contact Client to remind them to login to Catalyst and complete their enrollment.
Requires Verification	The Client has completed the steps to Enroll from their smartphone (facial and voice biometrics), but Officer has not approved the image. **NEXT STEP:** Officer needs to go the Client’s Enrollment screen and review the photo image. The Officer can either “Approve” or “Reject” the image by clicking on the blue button underneath the image, and selecting “Save.” (*See “Step: Requires Verification” below for a screen shot*.)
Approved	The Client has completed the steps to Enroll from their smartphone (facial and voice biometrics). The Officer has approved the biometrics, but has not completed the final step (Step 5) of the Enrollment. **NEXT STEP:** From the Enrollment screen, Officer should click on the **blue pencil icon** next to the Client’s name. Catalyst will take the Officer to “Step 5” of the Enrollment Process. Officer must click on the purple “Complete Enrollment” button. The Client’s name will no longer show on the Enrollment screen.

UNENROLLING A CLIENT

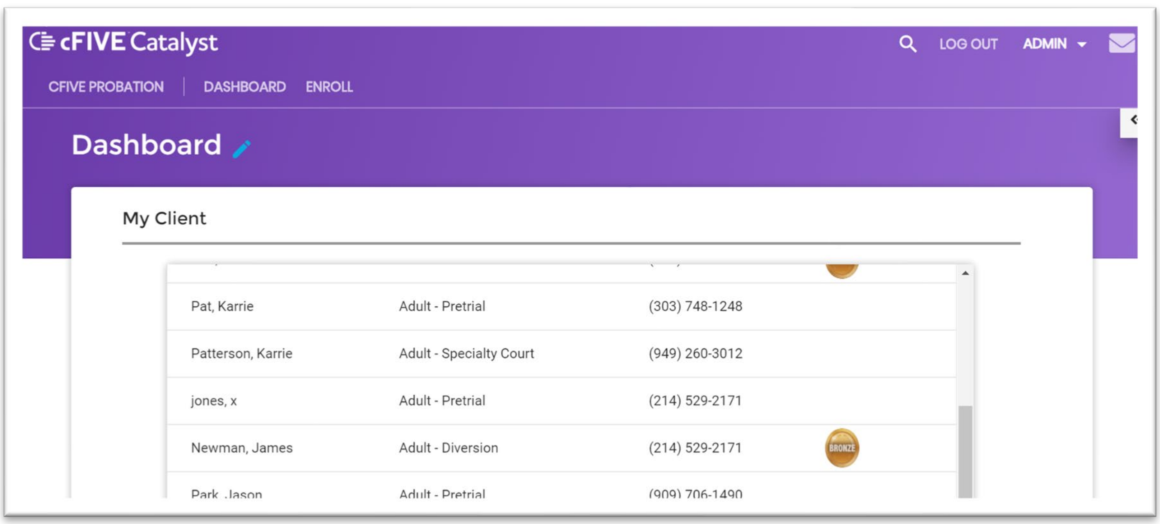
When a client has completed their supervision period and/or their permissions to use Catalyst needs to be revoked, you can unenroll them.

It is important to note that once they are "unenrolled" you will no longer see them or their information in your Catalyst system.

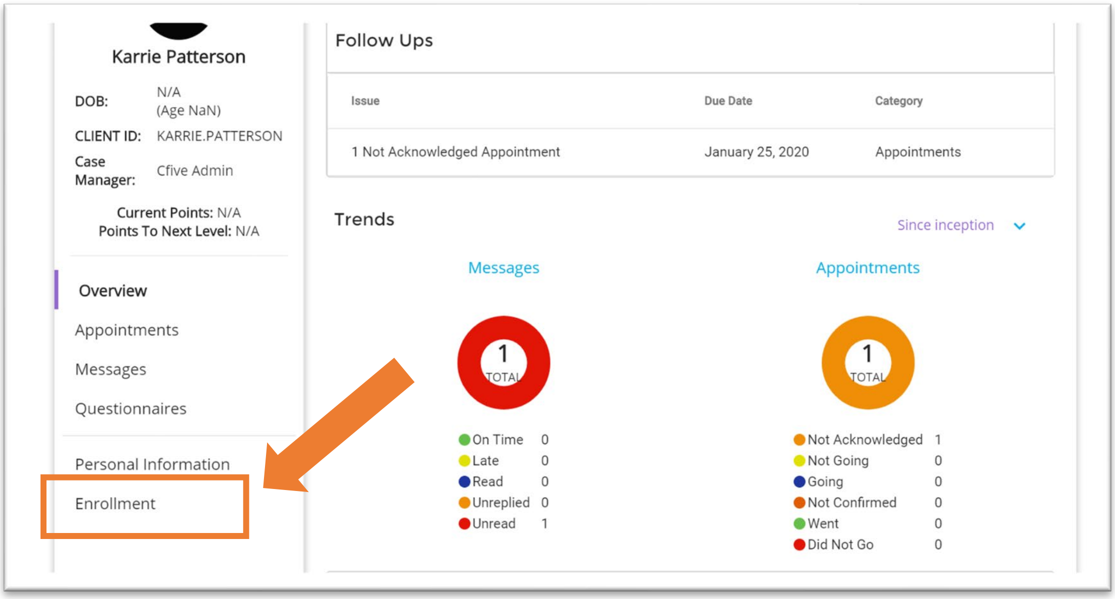
History is Retained. After a client has been Unenrolled Catalyst continues to retain the client record in the Catalyst system. You can access it at anytime using Client Search (magnifying glass icon).

Steps to Unenroll a Client

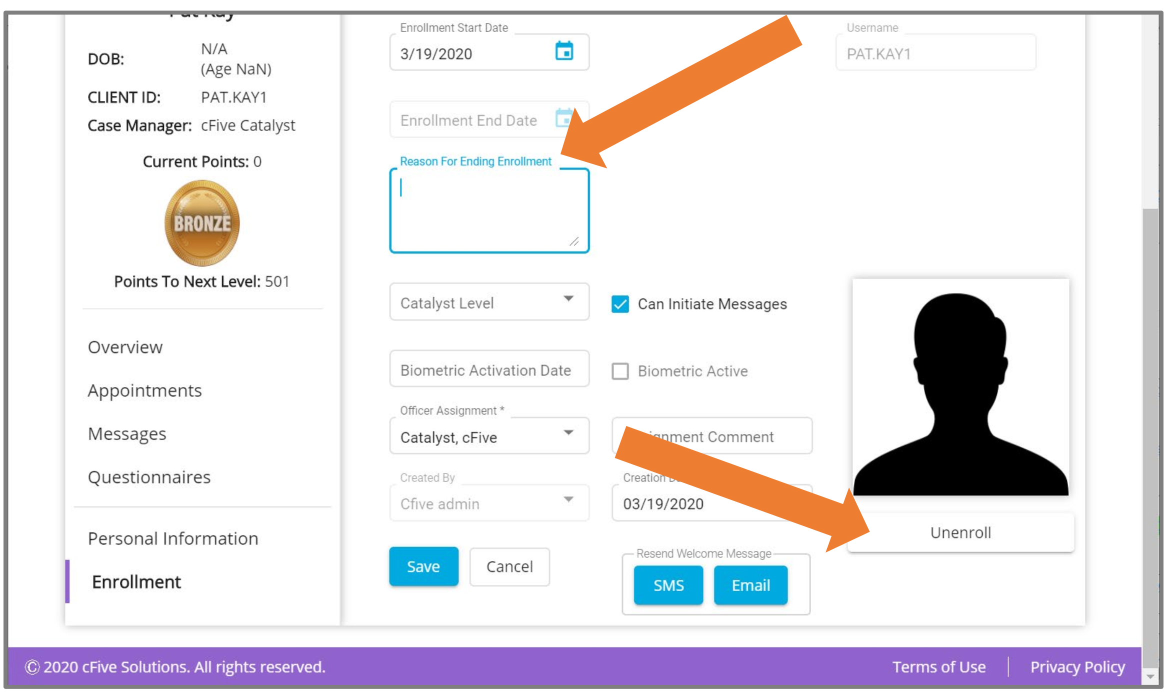
1: **Select Client**. From your "Client" list on your home screen, select the Client you want to Unenroll by clicking on their name.



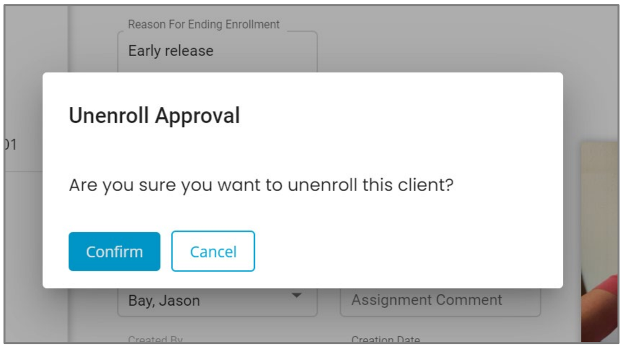
2: From the left-hand column, **navigate to the "Enrollment" section** of their Client Profile.



3: In the "Enrollment" screen, go to the "**Reason for Ending Enrollment**" text box and type in the reason. (The box will turn blue when you click into the text box.) After you have entered the reason, click on the "Unenroll" button beneath the client's image.



4. The “**Unenroll Approval**” dialog box will appear asking you to confirm the Unenrollment:



5: When you click “**Confirm**”, Catalyst will auto-fill the “Enrollment End Date” and “Enrollment Ended By” fields.

- The client will be removed from the case manager’s Client List on their Dashboard.
- The client’s record will be retained in Catalyst, and can be found using the Client Search function.

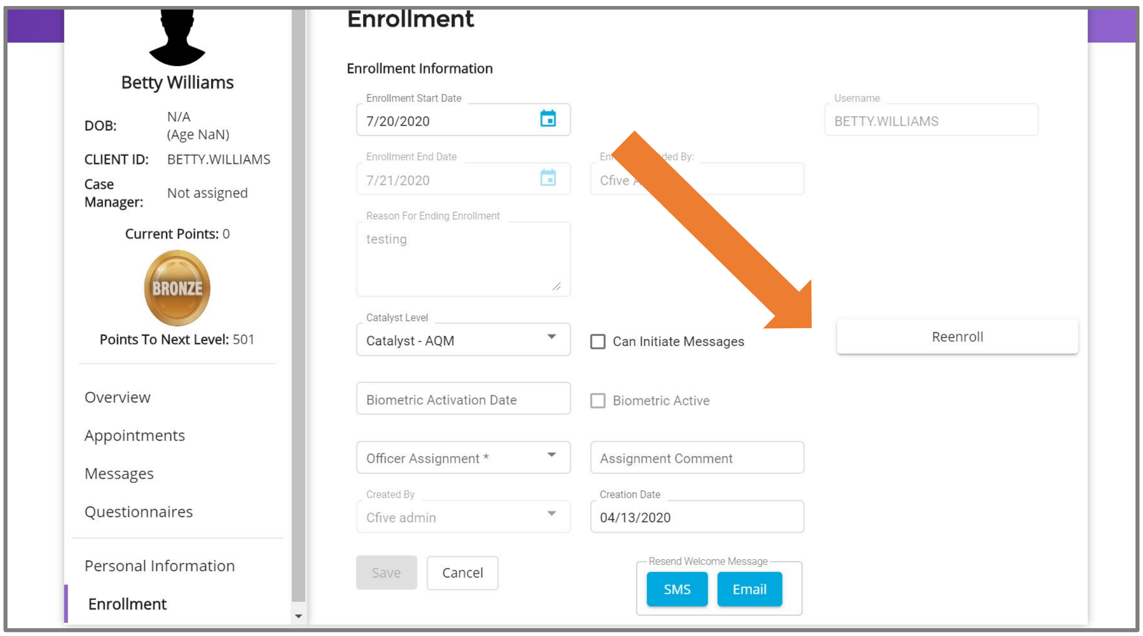
REENROLLING A CLIENT

There are times when an Unenrolled Client may need to be re-enrolled in Catalyst. This can be done quickly by following these steps:

1. Locate the Client's name using Catalyst's **Client Search** (using the magnifying glass icon located on the top right-hand side of the purple navigation bar). You will be redirected to the Client's "**Client Profile**" screen.

2. From the Client Profile Page, click on "**Enrollment**" (in the left-hand column below the Client's name) to navigate to client's Enrollment screen.

3. Click on the "**Reenroll**" button (on the right-hand side of the screen).



4. Catalyst will display a pop-up dialog box asking you to confirm the Reenroll, click "**Confirm**".

5. At this point, Catalyst will redirect you to **Step 1** of the Enrollment process (Personal Information). Here you can update the client's information as needed. Next, click "**Save and Continue**" and advance through Steps 2 and 3 of Enrollment.

When you select "Save and Continue" on Step 3 of the Enrollment process, the Client will be sent an Enrollment SMS/text message on their smartphone (asking them to reenroll).