



## cFive Catalyst Quick Start Guide

### Client Enrollment, Unenrollment and Reenrollment



**Data-driven  
Outcomes**

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August 2020 (Version 2.7)



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## INTRODUCTION

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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



## ENROLL A NEW CLIENT

### Step 1: Login to cFive Catalyst

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

### Step 2: Navigate to the “Enroll” screen

1. **Navigate to the “Enroll” screen.**

The screenshot shows the 'Enrollments' screen in the cFIVE Catalyst application. The browser address bar shows 'cat2dev.cfive.com:8080/#/enrollments'. The application header is purple and contains the cFIVE Catalyst logo, a search icon, 'LOG OUT', 'ADMIN', and a notification icon. Below the header, there are tabs for 'CFIVE TENANT 1', 'DASHBOARD', and 'ENROLL'. An orange arrow points to the 'ENROLL' tab. The main content area is titled 'Enrollments' and contains a search bar, a 'New Enrollment' button, and a table of enrollments.

Profile	First Name	Last Name	Identifiers	Phone	Address	Case Manager	Status
	Steve	Kres		(949) 260-3000		James Newman	Requires Verification
	Vee	Bann		(949) 260-3001		James Newman	Requires Verification
	Rud	Ohin		(214) 529-2171		James Newman	Requires Verification



### Step 3: Enroll a New Client (New Enrollment)

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

The screenshot shows the 'Enrollments' page in the cFIVE Catalyst application. The page has a purple header with the cFIVE Catalyst logo, a search icon, 'LOG OUT', 'ADMIN', and a mail icon. Below the header is a navigation bar with 'CFIVE TENANT 1', 'DASHBOARD', and 'ENROLL'. The main section is titled 'Enrollments' and contains a search bar with 'Joe Jones' and a 'New Enrollment' button. An orange arrow points from the search bar to the button.

Enter Basic Client Information

The screenshot shows the 'New Enrollment' page in the cFIVE Catalyst application. The page has a purple header with the cFIVE Catalyst logo, a search icon, 'LOG OUT', 'ADMIN', and a mail icon. Below the header is a navigation bar with 'CFIVE TENANT 1', 'DASHBOARD', and 'ENROLL'. The main section is titled 'New Enrollment' and contains a '1: Personal Information' tab. The form is titled 'Personal Information' and has two sections: 'Basic Information' and 'Demographic Information'. The 'Basic Information' section includes fields for 'First Name \*', 'Middle Name', 'Last Name \*', 'Email', 'Client Type \*', and 'Phone Number'. The 'Demographic Information' section includes fields for 'DOB', 'Gender', and 'Marital Status'. There is a 'Check duplicates' button.

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:

A screenshot of a form for entering client information. It includes input fields for 'City', 'State' (a dropdown menu), and 'Zip Code'. Below these is a 'Country' dropdown menu currently set to 'United States'. At the bottom of the form are three buttons: a blue 'Save' button, a blue 'Save and Continue' button with a right-pointing arrow, and a grey 'Cancel' button.

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

A screenshot of the cFIVE Catalyst web application. The top navigation bar is purple and contains the cFIVE Catalyst logo, a search icon, 'LOG OUT', 'ADMIN' with a dropdown arrow, and a mail icon. Below the navigation bar, there's a breadcrumb trail: 'CFIVE TENANT 1 | DASHBOARD | ENROLL'. The main heading is 'Enrollment'. Below this is a horizontal process flow with five steps: '1: Personal Information', '2: Employment', '3: Enrollment', '4: Enrollment Verification', and '5: Questionnaire Schedule', connected by right-pointing arrows. Step 2, 'Employment', is the active step. A modal window titled 'Employment' is open in the center. It shows a toggle switch for 'No employments reported' which is currently turned off. At the bottom of the modal are three buttons: 'Save', 'Save and Continue' with a right-pointing arrow, and 'Cancel'. To the right of the modal, there is a blue button with a plus sign and the text '+ Add'.



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

The screenshot shows a web application interface for managing employment. At the top, there is a toggle switch labeled "Employments reported" which is currently turned off. Below this, the heading "Employment" is displayed. Under the heading, there is a tab labeled "Employment 1" with a red trash icon to its right. To the right of the tabs is a button labeled "+ Add". The form contains several input fields: "Employer Name \*" (required), "Title \*" (required), "Employee Phone", "Extension", "Street Address \*" (required), "City \*" (required), "State \*" (required, with a dropdown arrow), "Zip Code", "Apt/Unit", and "Country \*" (required, with a dropdown arrow showing "United States"). There is also a checkbox labeled "Current Work". At the bottom of the form are three buttons: "Save", "Save and Continue >", and "Cancel". The footer of the page contains the copyright notice "© 2020 cFive Solutions. All rights reserved." and links to "Terms of Use" and "Privacy Policy".

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**

**Enrollment**

Enrollment Information

Enrollment Start Date: 2/3/2020

Enrollment End Date

Catalyst Level: [dropdown]

Biometric Activation Date

Officer Assignment: [dropdown]

Created By: [dropdown]

Username \*: JOHNNY.SMITH

☐ Can Initiate Messages

☐ Biometric Active

Assignment Comment

Creation Date

Save Save and Continue > Cancel

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





The screenshot shows the 'Enrollment' form with the following fields and controls:

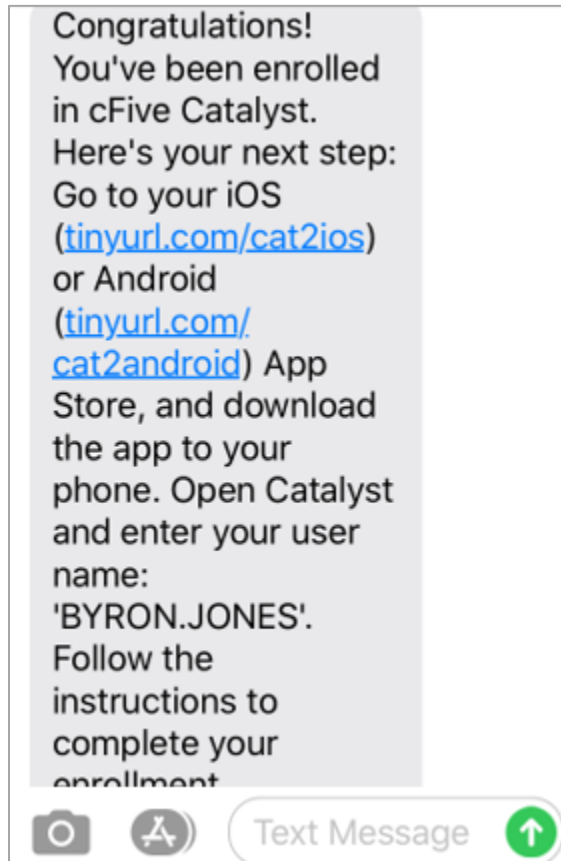
- Enrollment Information**
  - Enrollment Start Date: 2/3/2020
  - Enrollment End Date: (empty)
  - Catalyst Level: (dropdown menu)
  - Biometric Activation Date: (empty)
  - Officer Assignment: (dropdown menu, highlighted by an orange arrow)
  - Created By: (dropdown menu)
- Permissions**
  - ☐ Can Initiate Messages (highlighted by an orange arrow)
  - ☐ Biometric Active
- Assignment**
  - Assignment Comment: (text input)
  - Creation Date: (text input)
- Buttons**
  - Save
  - Save and Continue >
  - Cancel
- Footer**
  - © 2020 cFive Solutions. All rights reserved.
  - Terms of Use | Privacy Policy

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.



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

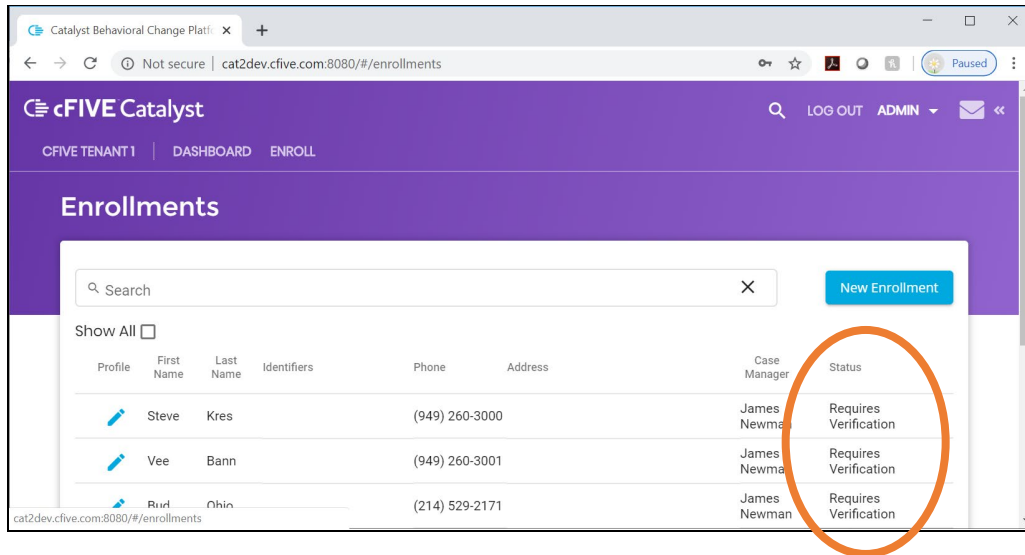
**NOTE:** It is a good idea to remind the client that they must enter their user name as it is provided in the text/SMS message (including the period between first and last name).





## 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:

**Enrollment**

1: Personal Information → 2: Employment → 3: Enrollment → 4: Enrollment Verification → **5: Questionnaire Schedule**

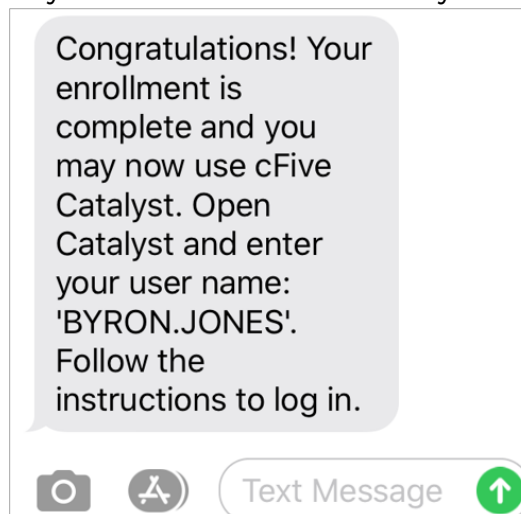
**Questionnaire Schedule**

☐ Add Schedule

**Complete Enrollment** **Cancel**

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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.

**Julian Foot**  
DOB: 01/08/1969 (Age 51)  
CLIENT ID: JULIAN.FOOT  
Case Manager: James Newman  
Current Points: 36  
BRONZE  
Points To Next Level:

**Overview**

**Follow Ups**

Issue	Due Date	Category
2 Past Due Appointments	December 12, 2019	Appointments
1 Unread Message	December 19, 2019	Messages

**Trends**

**Appointments**

2 TOTAL

- Attended 0
- Didn't attend 0
- Going 0
- Not Going 0
- Not Responded 2

**Questionnaires**

0 TOTAL

- On Time 0
- Late 0
- Missed 0

**Messages**

3 TOTAL

- On Time 0
- Late 0
- Missed 3

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

**Andy Doe**  
DOB: N/A (Age NaN)  
CLIENT ID: ANDY.DOE  
Case Manager: Cfive Admin  
Current Points: -22  
Points To Next Level: 22

**Enrollment Information**

Enrollment Start Date: 1/10/2020  
Enrollment End Date:   
Reason For Ending Enrollment:   
Catalyst Level: Catalyst - AQM  
Biometric Activation Date: 01/13/2020  
Officer Assignment \*: Admin, Cfive  
Created By: Cfive admin  
Creation Date: 01/10/2020

☐ Can Initiate Messages  
☒ Biometric Active

Assignment Comment:   
Unenroll

Resend Welcome Message: SMS Email

Save Cancel

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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.

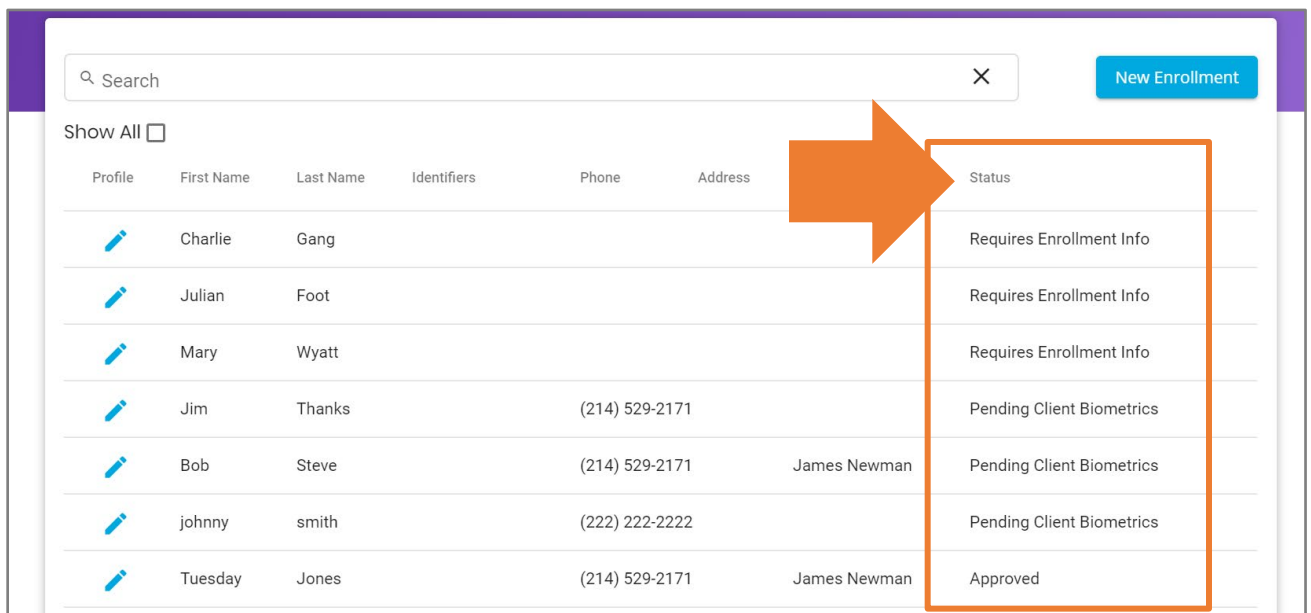


## MANAGING ENROLLMENT PROCESS BY STATUS

### 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.

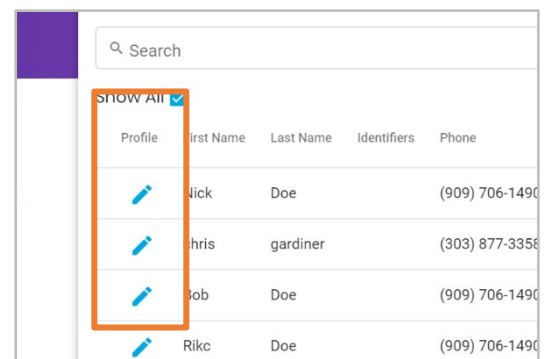


The screenshot shows the Enrollment Screen interface. At the top, there is a search bar with a magnifying glass icon and a close button (X). To the right of the search bar is a blue button labeled "New Enrollment". Below the search bar is a "Show All" checkbox. The main table has columns: Profile, First Name, Last Name, Identifiers, Phone, Address, and Status. The Status column is highlighted with an orange box, and a large orange arrow points to it from the left. The table contains the following data:

Profile	First Name	Last Name	Identifiers	Phone	Address	Status
	Charlie	Gang				Requires Enrollment Info
	Julian	Foot				Requires Enrollment Info
	Mary	Wyatt				Requires Enrollment Info
	Jim	Thanks		(214) 529-2171		Pending Client Biometrics
	Bob	Steve		(214) 529-2171	James Newman	Pending Client Biometrics
	johnny	smith		(222) 222-2222		Pending Client Biometrics
	Tuesday	Jones		(214) 529-2171	James Newman	Approved

### 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.



The screenshot shows a portion of the Enrollment Screen. The "SHOW ALL" checkbox is checked. The table has columns: Profile, First Name, Last Name, Identifiers, and Phone. The Profile column is highlighted with an orange box. The table contains the following data:

Profile	First Name	Last Name	Identifiers	Phone
	Wick	Doe		(909) 706-1490
	Chris	gardiner		(303) 877-3358
	Bob	Doe		(909) 706-1490
	Rikc	Doe		(909) 706-1490



## Status Definitions

Status	Description
Requires Enrollment Information	<p>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).</p> <p><b>NEXT STEP:</b> Officer should go to Enrollment screen, and complete Steps 1 through 3.</p>
Pending Client Biometrics	<p>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.</p> <p><b>NEXT STEP:</b> Contact Client to remind them to login to Catalyst and complete their enrollment.</p>
Requires Verification	<p>The Client has completed the steps to Enroll from their smartphone (facial and voice biometrics), but Officer has not approved the image.</p> <p><b>NEXT STEP:</b> 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.)</p>
Approved	<p>The Client has completed the steps to Enroll from their smartphone (facial and voice biometrics).</p> <p>The Officer has approved the biometrics, but has not completed the final step (Step 5) of the Enrollment.</p> <p><b>NEXT STEP:</b> From the Enrollment screen, Officer should click on the <b>blue pencil icon</b> 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.</p> <p>The Client’s name will no longer show on the Enrollment screen.</p>





## UNENROLLING A CLIENT

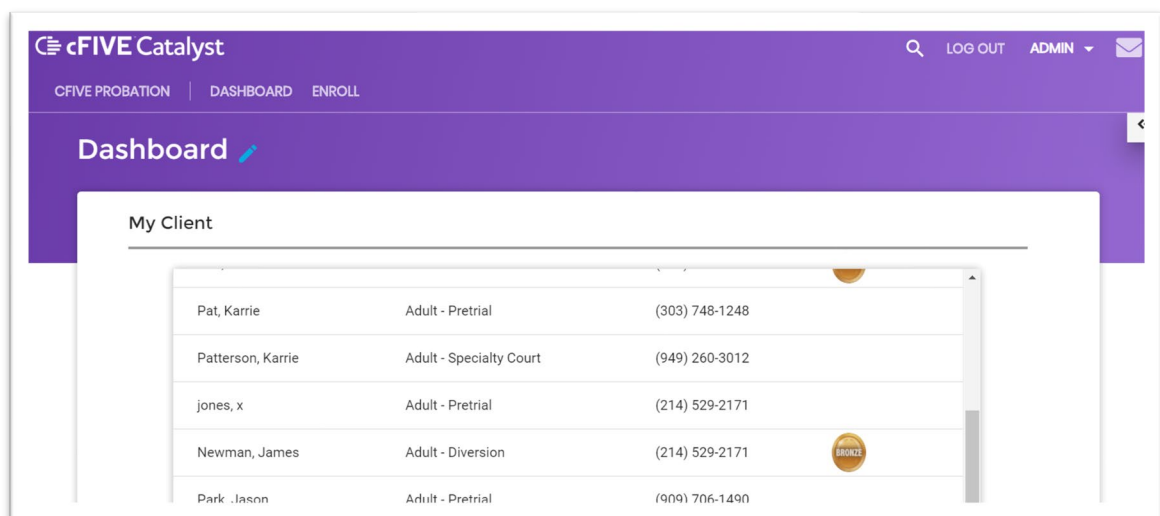
When a client has completed their supervision period and/or their permissions to use Catalyst needs to be revoked, you can unenroll them.

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.

**Karrie Patterson**

DOB: N/A (Age NaN)  
CLIENT ID: KARRIE.PATTERSON  
Case Manager: Cfive Admin  
Current Points: N/A  
Points To Next Level: N/A

**Follow Ups**

Issue	Due Date	Category
1 Not Acknowledged Appointment	January 25, 2020	Appointments

**Trends**

Since inception ▾

**Messages**

1 TOTAL

- On Time 0
- Late 0
- Read 0
- Unreplied 0
- Unread 1

**Appointments**

1 TOTAL

- Not Acknowledged 1
- Not Going 0
- Going 0
- Not Confirmed 0
- Went 0
- Did Not Go 0

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.

**Karrie Patterson**

DOB: N/A (Age NaN)  
CLIENT ID: PAT.KAY1  
Case Manager: cFive Catalyst  
Current Points: 0  
Points To Next Level: 501

**Enrollment**

Enrollment Start Date: 3/19/2020  
Enrollment End Date:   
Reason for Ending Enrollment:   
Catalyst Level:   
Biometric Activation Date:   
Officer Assignment \*: Catalyst, cFive  
Created By: Cfive admin  
Creation Date: 03/19/2020  
Can Initiate Messages: ☒  
Biometric Active: ☐  
Assignment Comment:   
Unenroll

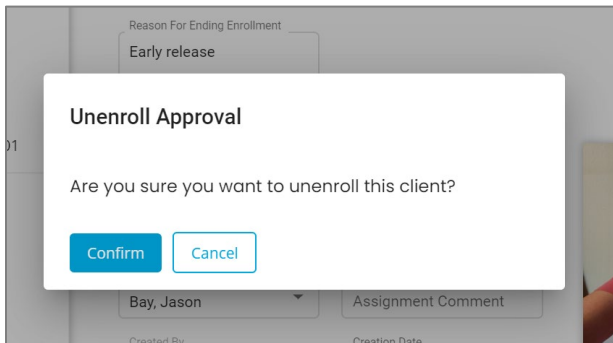
Save Cancel

Resend Welcome Message:   
SMS Email

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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).

The screenshot shows the Catalyst Enrollment screen for a client named Betty Williams. The left sidebar displays the client's profile, including their name, DOB (N/A), CLIENT ID (BETTY.WILLIAMS), Case Manager (Not assigned), Current Points (0), and a BRONZE badge. The main area is titled 'Enrollment' and contains various fields for enrollment information. A large orange arrow points to the 'Reenroll' button on the right 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).