



cFive Catalyst Quick Start Guide

Appointments



**Data-driven
Outcomes**

cFive Solutions, Inc.

949.260.3000 | www.cfive.com

2021 (Version 2.2)



Table of Contents

INTRODUCTION	2
Additional Learning Resources.....	2
Minimum Phone Operating Systems Supported	2
GETTING STARTED	3
APPOINTMENTS.....	5
Create an Appointment	5
CLIENT PERSPECTIVE.....	11
What to expect on the Catalyst Mobile App.....	11

V 2.2.2.1.21



INTRODUCTION

This Quick Start Guide provides instructions for using Catalyst's to set and manage Appointments.

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



GETTING STARTED

Let's face it, there are a lot of moving parts when you schedule appointments with Clients. Whether you are setting appointments for a phone call check-in; court appearance; drug test; client program, meeting or counseling session; one-on-one meeting; or other appointment type, keeping clients apprised of their appointment date, time and location as well as sending reminders and following up to make sure they are planning to attend, bring required paperwork, etc. is time consuming.

Catalyst's innovative Appointment Service is much more than just an appointment tracking tool. It takes Appointments to a new level, featuring a series of smart supervision features and functionality including comprehensive appointment notification and reminder system, automated client appointment acknowledgment notices, personalized reminders, directions to each appointment, the ability to add notes to each appointment,-- and Catalyst uses behavior change, gamification and conversational language concepts to increase engagement and client self-management.

Catalyst Appointments Service promotes behavior change by:

- Give Client ALL they need:
 - Dates, times and addresses
 - Directions
 - Ability to interact with case manager
 - 24 X 7 real-time access to their schedule
- Personalized Reminders:
 - Multiple Notifications: Configurable frequency
 - Not just for Appointments, but all required actions
 - Client Acknowledgement: Receipt of reminders and verify attendance

Appointment Service Overview

Each time an appointment is added (assessment, drug test, court hearing, required contact) to a client's schedule they will receive a push notification alerting them of the addition.

When the client receives the notification, they can confirm receipt and acknowledge a willingness to appear by accepting the appointment. Acceptance of an appointment is automatically recorded in the client's file, eliminating any doubt as to the client's knowledge and understanding of his need to appear.

When the appointment is scheduled by the case manager, Catalyst will notify the client so they can confirm their attendance of the appointment. At the



same time, Catalyst will generate a series of automated notifications reminding the client of any upcoming appointments.

To help clients appear at their appointments, Catalyst provides driving, walking and public transportation directions assistance for each appointment with an address, so there is no question of where to go or how to get there.

Shortly after a scheduled appointment has been scheduled to take place a client will receive a notification asking them if they have attended. If they reply yes, attendance of the appointment is automatically recorded in the client's file allowing for verification of the client's attendance. If they reply no, the case manager will receive a Follow Up notification.

This combination of the client calendar of appointments, push notifications of new appointments, reminders of upcoming appointments, turn by turn directions, and the ability to acknowledge and appointment's receipt, acceptance and attendance can increase client appearance rates.



APPOINTMENTS

The creation of a client's **Appointment** will automatically send notifications to the client's smartphone via the Catalyst App.

Create an Appointment

Step 1 – From the Client Profile page, click on the “New” button, and select “Appointment” from the drop-down menu:

The screenshot shows the 'Client Profile' page for Kelly Smith. On the right side, there is a 'New' button with a dropdown arrow. The dropdown menu is open, showing three options: 'Appointment', 'Message', and 'Questionnaire Frequency'. The 'Appointment' option is highlighted with an orange rectangular box.

Step 2 – From the **New Appointment** screen, fill in the fields for:

- Type
- Date – Starting
- Date – Ending
- Address
- Notes

The screenshot shows the 'New Appointment' form. On the left, there is a sidebar with the client's profile (Kelly Smith) and a list of tabs: 'Overview', 'Appointments', and 'Messages'. The 'Appointments' tab is selected. The main form area contains the following fields:

- Program/Service:** A dropdown menu.
- Date:** A date picker set to 5/7/2020.
- Starting:** A time picker set to 1:00 PM.
- Ending:** A time picker set to 2:00 PM.
- Address:** A dropdown menu set to 'Other'.
- Other Address:** A text field containing '2700 E Pine Street, Chicago IL 60603'.
- Notes:** A large text area containing the text: 'This is where you will be reporting for Community Service. Bring your photo ID and hours log.'

At the bottom of the form are 'Save' and 'Cancel' buttons. The footer of the page includes '© 2020 cFive Solutions. All rights reserved.', 'Terms of Use', and 'Privacy Policy'.



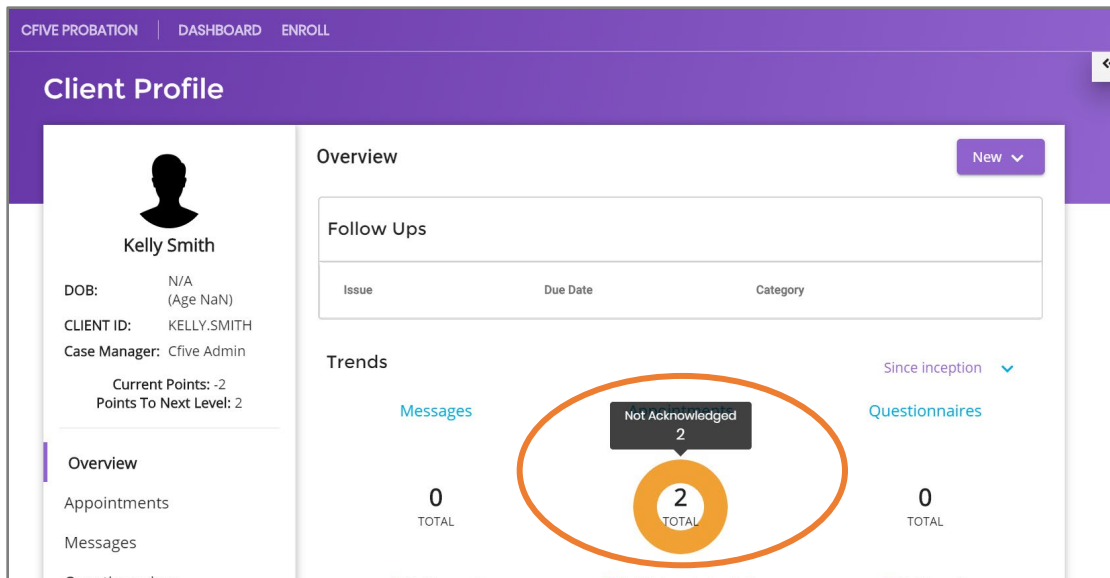
There are several Appointment Types you can choose from the drop-down including:

- In-Sight Call
- Court Hearing
- Drug Test
- Program/Service
- Meeting
- Office Visit
- Home Visit
- Phone Meeting

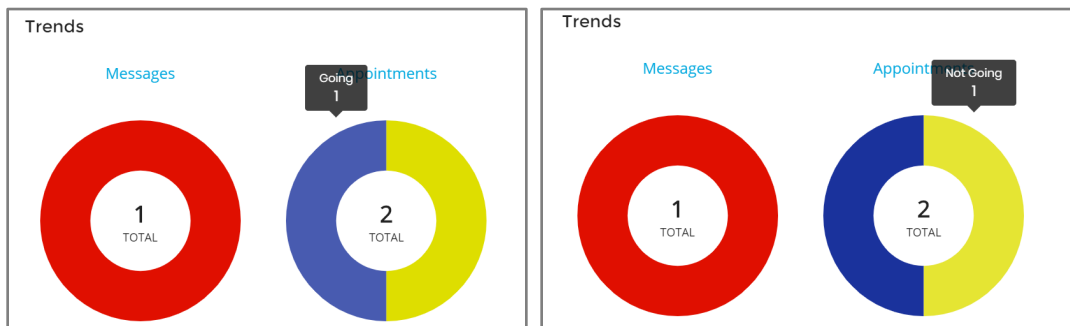
Step 3 -- When you have entered all relevant information, click on the **blue “Save” button**. You will be redirected to the Client’s Client Profile home page. This area provides you at-a-glance detail to the Client’s Appointment activity.

Checking Appointment Status Using Trends

In the **Trends section** of the Client Profile page, when you mouse over the “Appointments” circle graphic Catalyst provides a status of this client’s Appointments. In this example, the Client has 2 Appointments that they have Not Acknowledged:



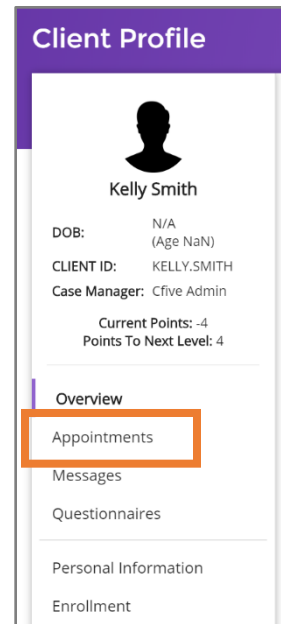
If the Trends image shows more than one color, you can toggle back and forth between the colors to see the status. In the example below, the Client has replied that they are “Going” to 1 Appointment, and “Not Going” to 1 Appointment.





To review the details about the Client's Appointments, you can click on the "**Appointments**" **hyperlink** on the left-hand navigation column in their Client Profile.

Note: This column is visible in any area that you are working in within the Client Record – Overview, Appointments, Messages, Questionnaires, Personal Information and Enrollment screens.



From the Client's **Appointments** screen, you will see three informational sections:

- **Follow Up:** Response from the Client is past due, and the case manager should follow up with the client to confirm attendance, etc.
- **Pending Client Action:** Appointment information has been sent to the Client, but the Client has not responded. The client's response is still within the acceptable response period.
- **Upcoming Appointments:** Appointments that have been scheduled in the future.



Each section provides details related to the Client's Appointments including:

- Date
- Time
- Type
- Status (what action the Client has taken regarding the Appointment)

Kelly Smith

DOB: N/A (Age NaN)
CLIENT ID: KELLY.SMITH
Case Manager: Cfive Admin
Current Points: -4
Points To Next Level: 4

Overview

Appointments

Messages

Questionnaires

Personal Information

Enrollment

Follow Up

Date	Time	Type ↑	Status
June 10, 2020	10:00 AM - 11:00 AM	Program/Service	NOT_ACKNOWLEDGED
May 7, 2020	01:00 PM - 02:00 PM	Program/Service	NOT_ACKNOWLEDGED

Pending Client Action

Date	Time	Type	Status
June 10, 2020	10:00 AM - 11:00 AM	Program/Service	NOT_ACKNOWLEDGED
May 7, 2020	01:00 PM - 02:00 PM	Program/Service	NOT_ACKNOWLEDGED

Upcoming Appointments

- No results -

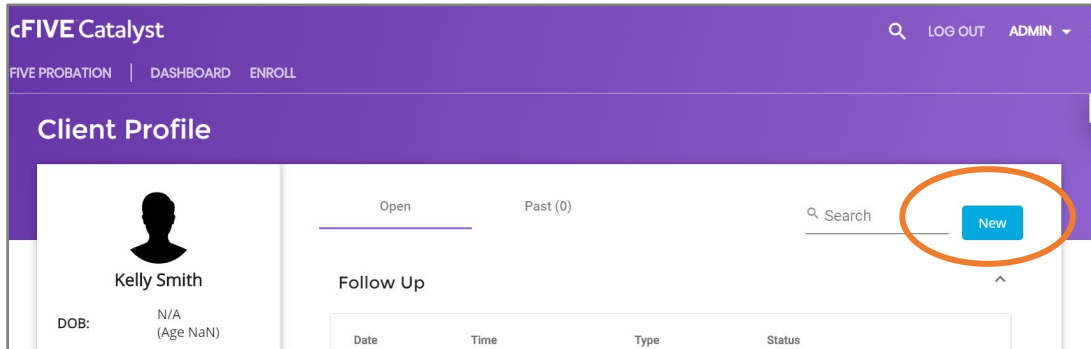
©2020 cFive Solutions. All rights reserved. Terms of Use | Privacy Policy

NOTE: When the client acknowledges the appointment, confirms attendance, etc., the fields related to the “Status” will be populated and updated in real-time.



Scheduling from the Appointments Screen

You can also schedule an Appointment from the Appointments screen, using the blue **“New”** button:



You will be redirected to a **“New Appointment”** screen where you can enter the details related to the Appointment (as described previously).

The screenshot shows the 'New Appointment' form. The page has a purple header with 'cFIVE Catalyst' and navigation links. The main content area is white. On the left, there's a profile card for Kelly Smith with a silhouette icon and 'DOB: N/A (Age NaN)'. To the right, there's a form titled 'New Appointment'. The form has a 'Type' dropdown menu, a 'Date' field with a calendar icon, 'Starting' and 'Ending' time fields with clock icons, an 'Address' dropdown menu with the value '17852 17th St, Tustin, AL 92780', and a 'Notes' text area. At the bottom, there are 'Save' and 'Cancel' buttons.

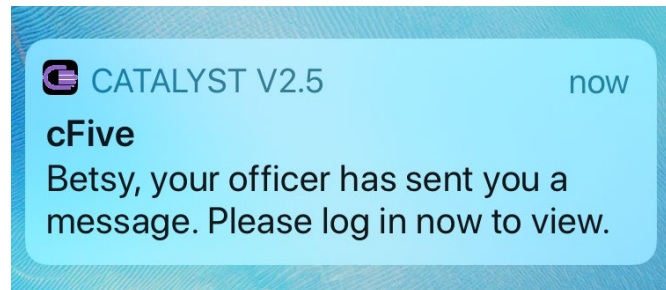
When you have completed the form, click **“Save”** to complete the Appointment.



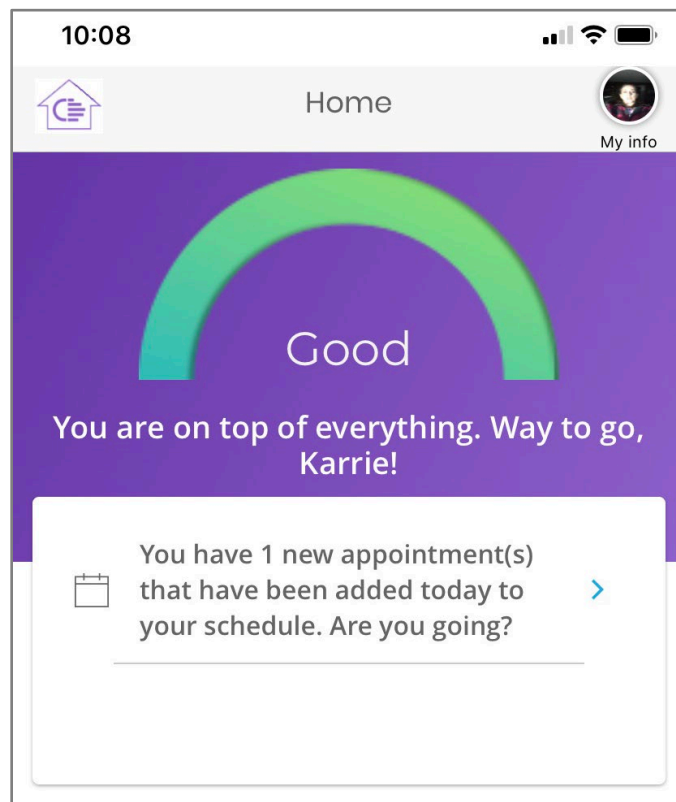
CLIENT PERSPECTIVE

What to expect on the Catalyst Mobile App

When a case manager has scheduled an appointment for the client, the client will first receive a “pop up” notification on their phone screen:



When the client logs into the Catalyst App, they will see a status screen that provides reminders of scheduled appointment(s) and requests for verification of attendance of appointments. Each time an appointment is added (assessment, drug test, court hearing, required contact) to a client’s schedule they will receive a push notification alerting them of the addition. When the client receives the notification, they can confirm receipt and acknowledge a willingness to appear by accepting the appointment.





Note: Acceptance of an appointment is automatically recorded in the client's file, eliminating any doubt as to the client's knowledge and understanding of his need to appear.

When the client clicks on the new appointment notification, they will be redirected to a screen where they can confirm that they will attend the appointment by answering the question **"Are you going?"**:

10:13

< Back Program/Service

Thursday, May 07

07:00 PM - 08:00 PM

📍 17852 17th St, Tustin, AL 92780

IMPORTANT NOTES

T4C Group Meeting, via Zoom. Please login 10 minutes early, make sure your camera and microphone are on.

Are you going? ✓ GOING Change

Save

Cancel

Each time the client logs into Catalyst, they will see a list of their scheduled Appointments for the next 7 days. From this screen they can:

- Review the Date, Time and Notes for the Appointment
- Change their Going/Not Going confirmation
- Access Directions to the Appointment (driving, walking and public transportation as available via the locale and the user's smartphone)

1:31

🏠 Appointments My info

Here are your appointment(s) for the next 7 days

Date	Program/Service	Status	Action
Thu May 07	07:00 PM - 08:00 PM	✓ GOING	Change

📍 Map



Depending on how the client responds to the Appointment (if the client says they are “Going” or “Not Going”) they will receive a positively worded behavior modification message:

