



cFive Catalyst Quick Start Guide

In-Sight Live Calling



**Data-driven
Outcomes**

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INTRODUCTION

This Quick Start Guide provides step-by-step instructions to get started with cFive Catalyst In-Sight live calling. In-Sight let's case managers and clients enjoy the benefits of office meetings and personal conversations while they communicate virtually face-to-face within cFive Catalyst's secure environment.

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.



ABOUT CATALYST IN-SIGHT CALLS

What's better than face-to-face meetings? Catalyst's In-Sight live calling feature within Catalyst. Research tells us we connect and communicate most effectively in person. In-Sight is the easiest way for case managers to connect with their clients live, virtually. It delivers the "in-person" supervision experience without the health, safety or security concerns related to live in-person interactions from the Catalyst app loaded on their phone or tablet.

Why Case Managers Like In-Sight Calls

In-Sight enables one-on-one communication paired with visual cues that help case managers effectively communicate their message and meaning clearly.

- They use from their Catalyst Officer Portal
- No need to send clients links to software, login codes, etc
- Catalyst dashboard widget shows all scheduled calls at-a-glance
- One-Click call initiation
- Can schedule calls or do on-demand calls with clients
- They can add notes to the appointment invite to help clients be prepared for the call
- Allows the case manager to see the client along with their gestures, facial expressions and other visual cues
- The client can show their case manager documents (such as completion certificates, course work, forms, grades, updated driver's license, etc.)
- The client can show the case manager where they are calling from (such as a specific room inside their home/work/school, or, geographic markers such as the address on the front of the building, etc.)
- They can enter case notes during the live call, and view them on future calls (the client does not see these)
- Call history is stored in Client Profile (no additional data entry required)
 - Did client accept the call (and date/time of acceptance)
 - Date/Time of call
 - Length of call
 - Case Notes

Why Clients Like In-Sight Calls

- Once they are enrolled in Catalyst, they don't have to download additional software to participate in the calls
- They can use from wherever they are comfortable and can login to Catalyst
- They just have to "answer" the call (no special codes or links needed)
- It helps them reduce or eliminate traveling to case manager's office
- Reduces time away from work, school or other activities
- Reduces lost wages, or costs for transportation, parking, etc.
- Provides the ability to show their case manager documentation of program attendance and completion, program course work, and other items such as an updated driver's license, etc.

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SCHEDULING AN IN-SIGHT CALL

Catalyst provides case managers the ability to have both scheduled and on-demand In-Sight Calls with clients. The most common type of call is one that has been scheduled with the client.

The following provides instructions about how to schedule In-Sight Calls.

Step 1: Where to Schedule the In-Sight Call

An In-Sight Call with your client is an “Appointment,” and is scheduled in the same manner as you would schedule any Appointment in Catalyst. You can schedule an appointment for an In-Sight Call from two places within Catalyst: From the **Client Profile**, choose the purple “**New**” button, then choose “**Appointment**” from the drop-down menu.

From the **Client Profile**, go to the “**Appointments**” screen from the left-hand navigation column below the Client’s name.

Step 2: Scheduling a New Appointment

1. From the **New Appointment** screen, scroll through the **Appointment Types** from the drop-down menu and click on the **In-Sight Call** option.
2. Once you have made that selection enter the additional call details (Date, Starting, Ending, etc.).
3. When you come to the **Address** field, select **Other** from the drop-down menu. When you select that option, an additional field will appear below called “**Other Address**.” In that field, type in the word “**Phone**”. Here is how that looks on your screen:

The screenshot shows the 'New Appointment' interface. On the left, a sidebar displays client information for Sam Mercury: DOB: N/A (Age NaN), CLIENT ID: SAM.MERCURY, Case Manager: Cfive Admin, Current Points: -2, and Points To Next Level: 2. The main content area is titled 'New Appointment' and features a dropdown menu for 'Appointment Type' set to 'In-Sight Call'. Below this are fields for 'Date' (12/17/2020), 'Starting' (1:00 PM), and 'Ending' (1:00 PM). The 'Address' dropdown is set to 'Other', and the 'Other Address' field contains the text 'phone'.



- Catalyst also provides you the option to enter **Notes** that you want your client to see when they accept the appointment. This allows you to remind the client about specific call discussion topics or give them other notes that would help them prepare for your call.

Jane Cosmo
DOB: N/A (Age NaN)
CLIENT ID: JANE.COSMO
Case Manager: cFive Catalyst
Current Points: 44
BRONZE
Points to Next Level: 45 /

New Appointment

In-Sight Call

Date: 3/8/2021 Starting: 1:00 PM Ending: 1:30 PM

Address: Other

Other Address: Phone

Notes: We will be discussing what you have learned during your Anger Management classes, so please have your notes available.

Save Cancel

- When you have completed entering all the information you want in the Appointment fields, click on the blue **“Save”** button at the bottom of your screen. Your In-Sight Call has been scheduled.
- Catalyst will send your client a notification that the appointment has been set, and a series of reminders (in accordance with the schedule you have set up in your system).



INITIATING AN IN-SIGHT CALL

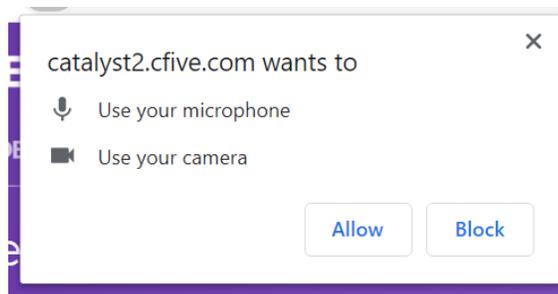
There are three places within Catalyst where you can start an In-Sight Live Call with your client:

- Dashboard Widget
- Client Profile
- In-Sight Icon

Getting Started: Allow Camera and Microphone Access

When a case manager first initiates a call with a client, Catalyst will require you to allow access to the Microphone and Camera of your desktop computer. This depends on the settings of your computer and any security protocols that your agency uses internally.

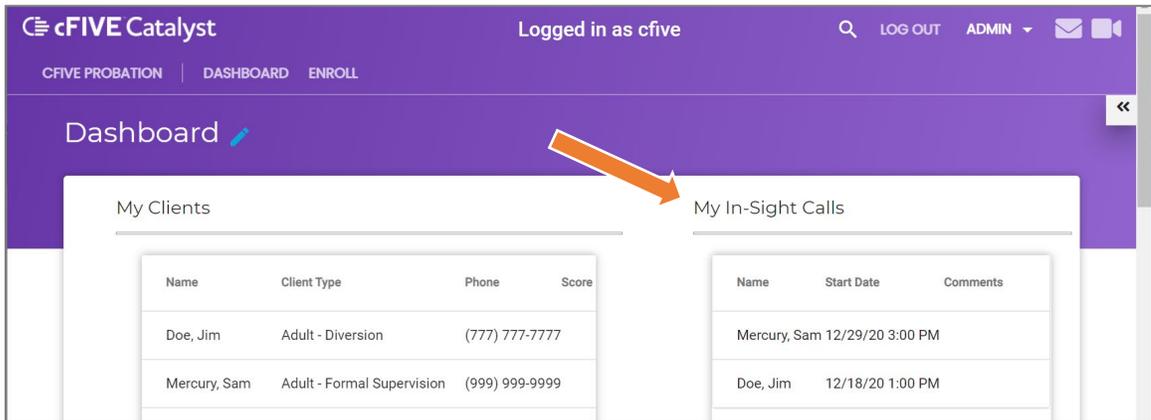
When prompted, you (the case manager) must select “**Allow**” to provide access to the microphone and camera when you receive the pop-up message.





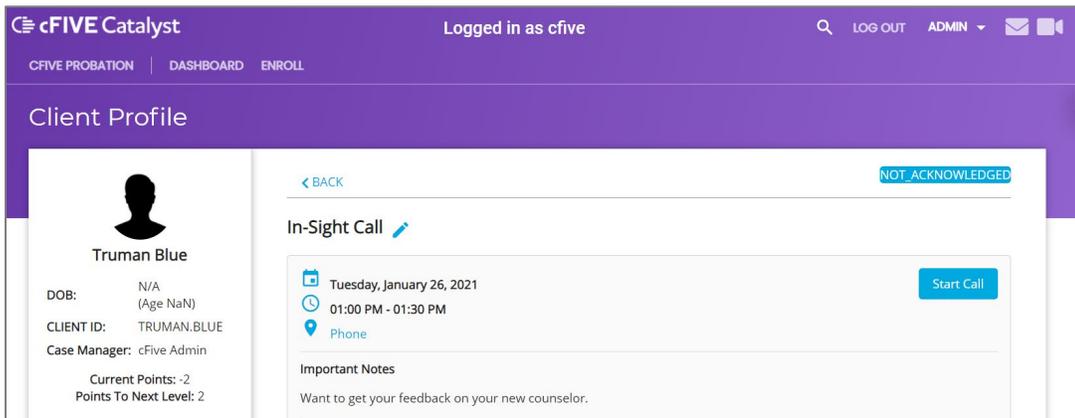
Option 1: Initiating an In-Sight Call from Case Manager's Dashboard

The “My In-Sight Calls” widget provides case managers a quick at-a-glance overview of all of their scheduled In-Sight Calls. The widget shows the client name, date and time of the scheduled calls.



To Initiate the Call: Case managers simply click on the client's name to see additional details related to the call. From there they can start the call using the blue “**Start Call**” button.

The screen below shows the case manager the notes they sent to the client prior to the call, and tells them that the client has “**Not Acknowledged**” the call notification (Blue Text Box upper-right hand corner of call screen. If the client has Acknowledged the call, this will say “Acknowledged.”



TIP: It is suggested that each case manager add the In-Sight Call Widget to their dashboard. This can be done using the Dashboard edit tool (blue pencil), selecting the widget and using the “drag and drop” process to add it.

(More detailed instructions are available in the the Quick Start Guide for “Getting Started with Catalyst”.)

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Option 2: Initialing an In-Sight Call from the Client Profile

Case Manager's can initiate a call from within the Client Profile of Catalyst. Step 1: From the Client Profile, select **Appointments** from the left-hand navigation column. You will be redirected to the client's Appointments screen.

Step 2: You will see the scheduled In-Sight Call in the **Upcoming Appointments** section on that screen.

Date	Time	Type	Status
December 21, 2020	01:00 PM - 01:30 PM	In-Sight Call	GOING

Step 3: You may click on any section of the Upcoming Appointment listing to be redirected to the In-Sight Call screen:

Date	Time	Type	Status
December 21, 2020	01:00 PM - 01:30 PM	In-Sight Call	GOING

Step 4: From the In-Sight Call screen, you will click on the blue **“Start Call”** button to initiate the call with the client.

Monday, December 21, 2020
01:00 PM - 02:00 PM
Phone

Important Notes
Please have your notes from this week's class with you so we can review them.

Video Call Comments

UPDATES AND REVISIONS
Jane Cosmo - GOING

When you click the **“Start Call”** button, you will be directed to the In-Sight Call Screen.

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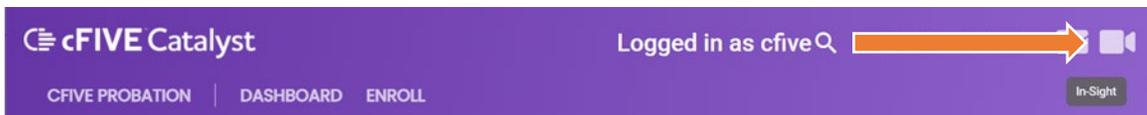


Option 3: Initiating an In-Sight Call from the In-Sight Icon

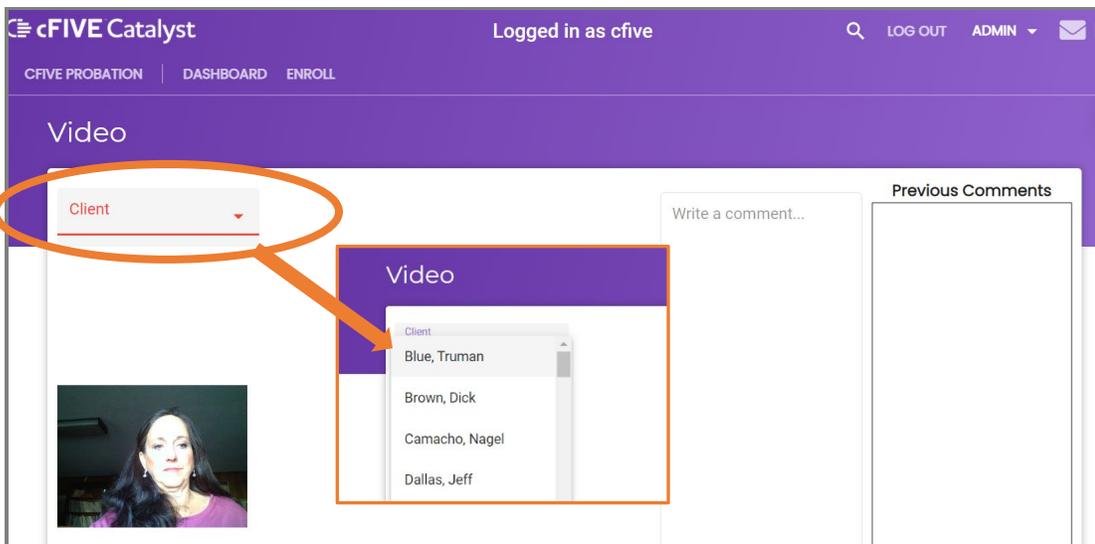
There are times when a case manager may want to have an In-Sight Call with a client, but they have not scheduled the call in advance. Catalyst allows the case manager to make “on-demand” calls using the In-Sight icon.

In-Sight Call Icon

In the purple header of your Dashboard, you will see an icon that resembles a “video camera” in the upper right-hand section of the header. This is what we refer to as the In-Sight icon. As you move your mouse over the top of the icon the word “In-Sight” appears.



1. After you click on the icon, the In-Sight Live Call screen will appear. It will show your image from your desktop camera on the lower right-hand corner of the screen. Above that you will see the word “Client” – there your client list will be displayed from the drop-down menu.



2. When you click on the down arrow your client list will appear, and you can select the specific client that you want to initiate the call with by clicking on their name.

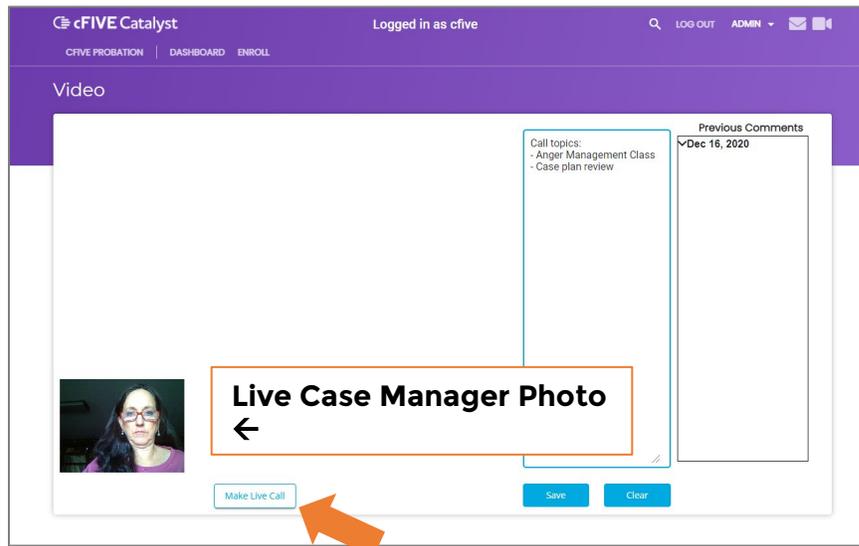


HOW THE IN-SIGHT LIVE CALL WORKS

Active In-Sight Call Screen

When you have allowed Catalyst access to your desktop computer's camera and microphone, and clicked on the “**Start Call**” button you will see your picture appear in the bottom left-hand corner of the In-Sight Call screen.

This picture is the image of you (the case manager) that your client will see on their smartphone device.



Make Live Call

Once your image has appeared, you start the call by clicking on the button that says **Make Live Call** beneath your picture. At this time your client will receive a notification on their smartphone device requesting them to Answer the call. Depending on how long it takes the client to acknowledge your call notification and login, It may take them a short amount of time to come online. *Please see the section “From the Client Perspective” in this document to see the screens a client sees during the In-Sight Call process.

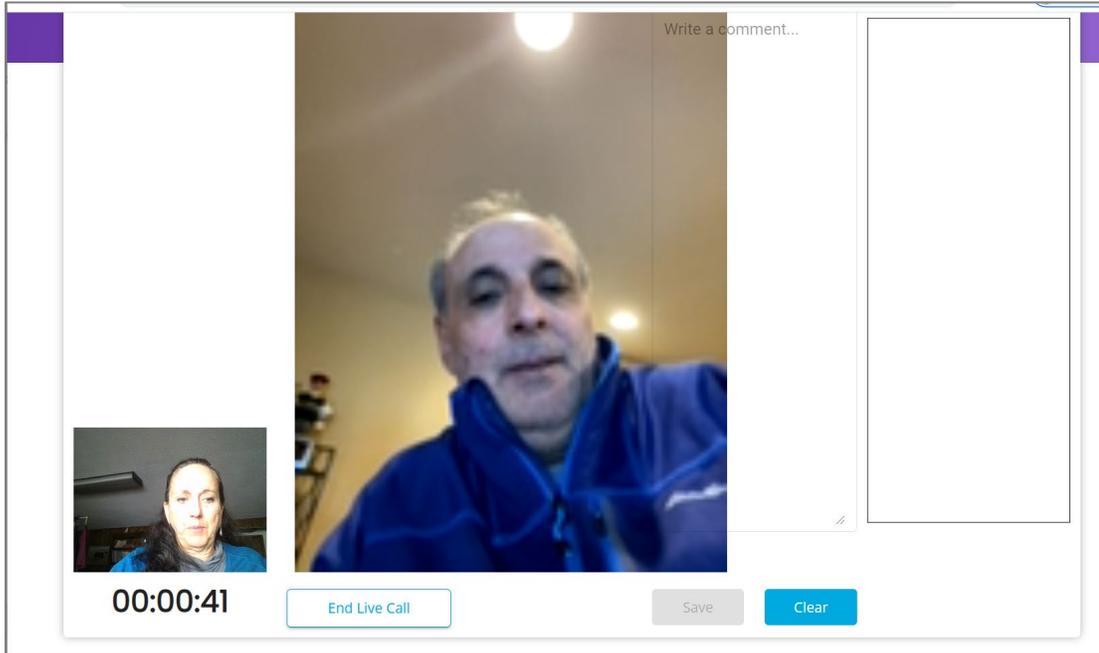
NOTE: Prior to answering the call, your client will be sent a notification about the call, and will be required to acknowledge that they give Catalyst permission to access their camera and microphone. This eliminates any issues with the client not understanding that their camera and microphone are being used during the call.

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When Client Answers the Call

When the client answers the In-Sight Call from their smartphone their image will appear in the middle section of the case manager's In-Sight Call screen:



Taking Notes

During the call the case manager can type in notes in the “Notes” section of the screen. Once the case manager clicks into the notes section, the outline of the section will turn blue. That is the indicator that the notes section is active.

These notes will only be visible to the case manager. They can be referenced at a later time, and will be displayed in future calls.



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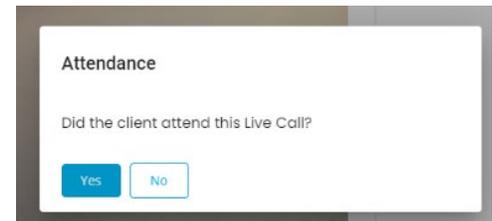


Ending the Call

1. To end the call the case manager clicks on the “**End Live Call Button**” at the bottom of the screen (near the case manager image):



2. When that has been clicked, Catalyst will display an “Attendance” dialog box where the case manager must confirm if the client attended the call.

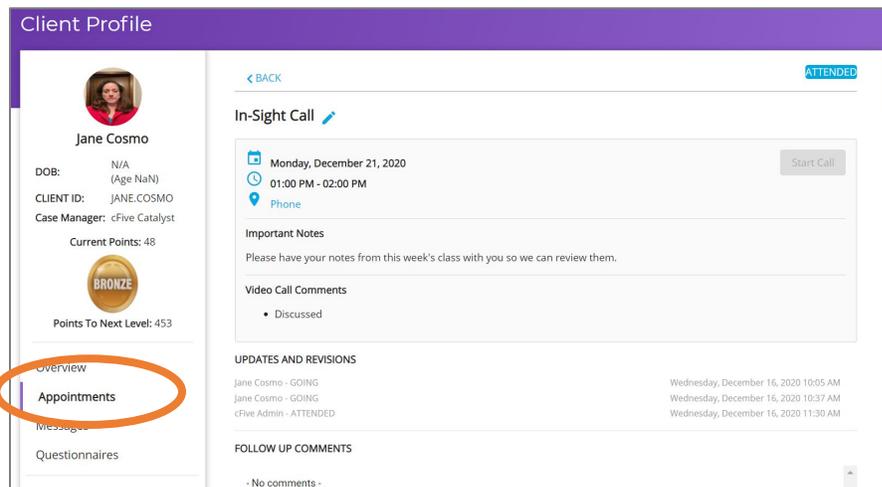


This information will be stored in the client profile for history and future reference.

Call Information and History

At anytime before or after the In-Sight Call, the case manager can click into the call detail from the Appointments screen and see details related to the call including:

- Data and time of scheduled call
- If the client acknowledged the appointment (Going/Not Going), and the date of acknowledgement.
- The date and time the call was held
- If the client attended the call
- Notes provided to the client before the call
- Comments the case manager wrote during the call
- Updates and revisions to the initial call appointment



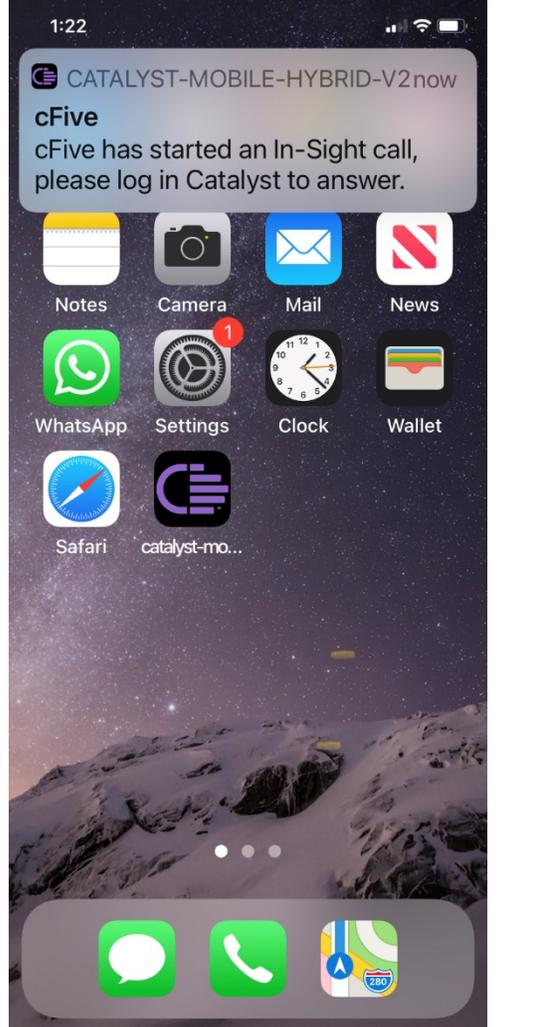
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FROM THE CLIENT PERSPECTIVE

The In-Sight Call from the Client Perspective

The screen shots in the following table shows the screens and messages that the client will experience during their In-Sight Call.

<p>Call Starting Notification</p> <p>When a case manager has started the call, the client will receive a notification on the phone telling them to login to Catalyst:</p>	
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Starting the Call

When the client has logged in they receive a notification that they have an In-Sight Call:

At the bottom of the screen the client taps the blue “Answer” button to answer the call.

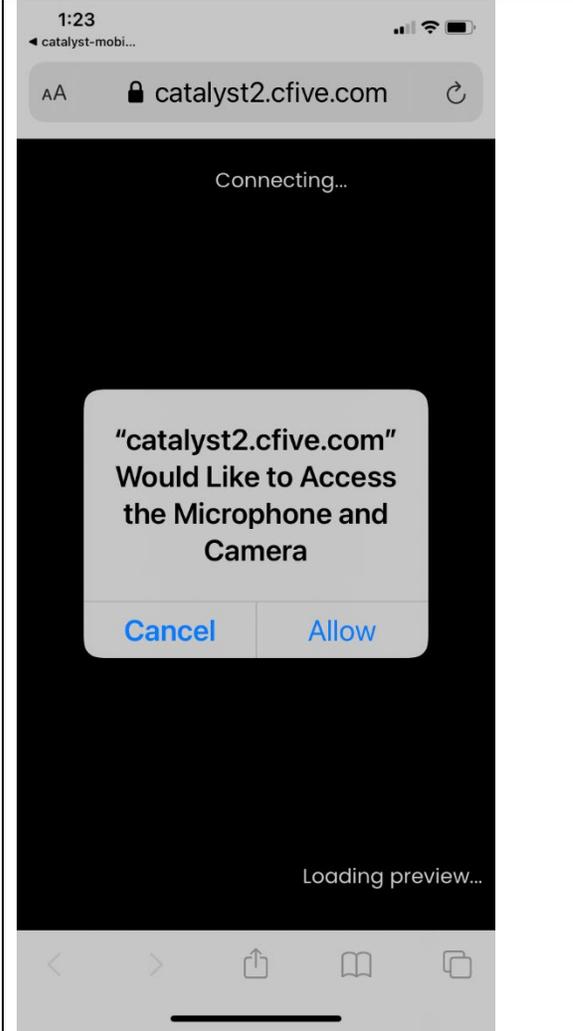




Allowing Access

Catalyst requires the client to give permission to allow access to their phone and camera.

NOTE: The client will NOT be able to login and/or use Catalyst unless both of these are allowed.

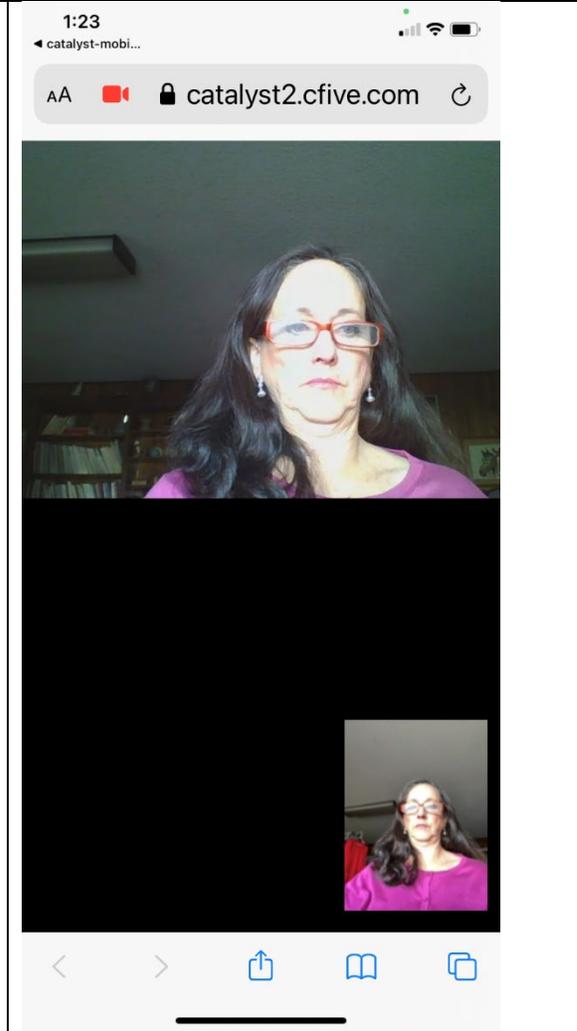




Call View

The client will know that the call has been connected when they see their case manager's image in the top of their screen.

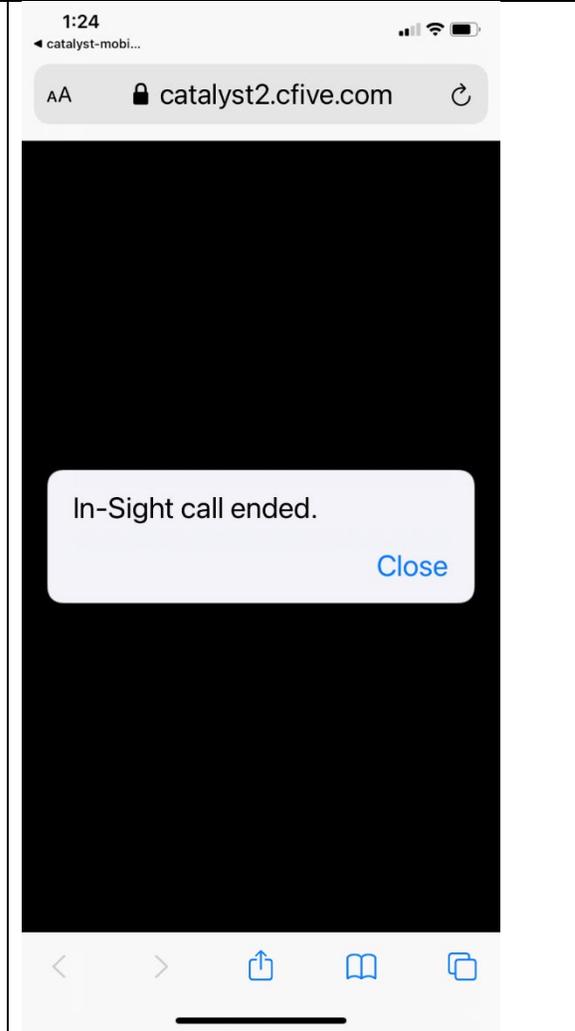
They will see a thumbnail image of themselves in the lower portion of the screen.





Ending the Call

The client will receive a pop-up notification when the call has been ended by their case manager:





Return to Catalyst Mobile App

When the client has tapped “Close” they can click on the purple “**Return to Catalyst**” button that appears on their screen to return to check activity in their Catalyst app.

