

## Working with Catalyst Messages: Case Manager Guide

### Getting Started.

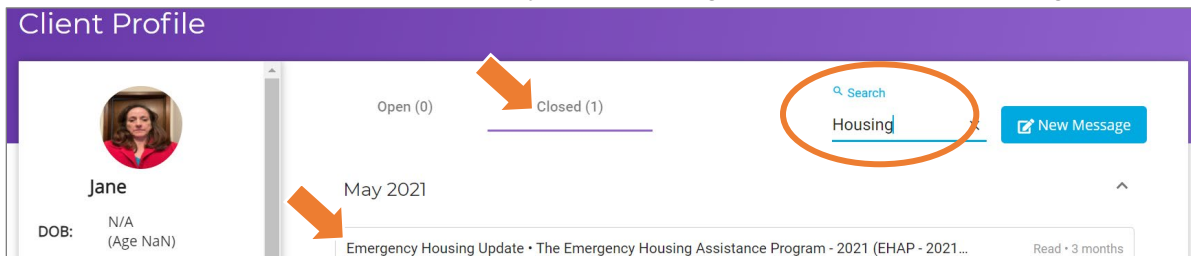
#### Places to Work with Messages in Catalyst:

1. You can access message activity for each client in their Client Record by selecting “Messages” from their left-hand navigation bar:
2. To see activity for all clients in your Catalyst caseload, click on the Messages icon on the upper right-hand portion of your dashboard.
3. You can send New Messages within the Messages icon, or, in the Client Profile area using either the (blue) “New Message” button on the Messages screen or the (blue) “New” button on the Overview screen.



#### Did you know...

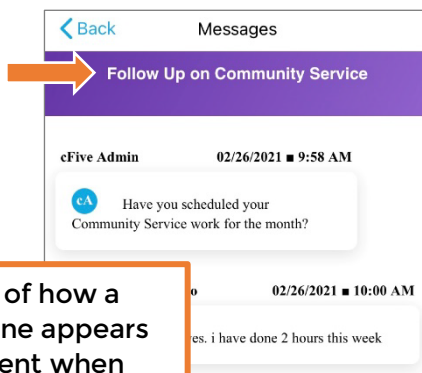
- ✓ Messages are searchable. In a Client Record you can quickly search a message for keywords or phrases. Catalyst will show you how many messages use that word/phrase in both the “Open” and “Closed” tab, and display the message on the corresponding screen:



### Best Practices for Message Management

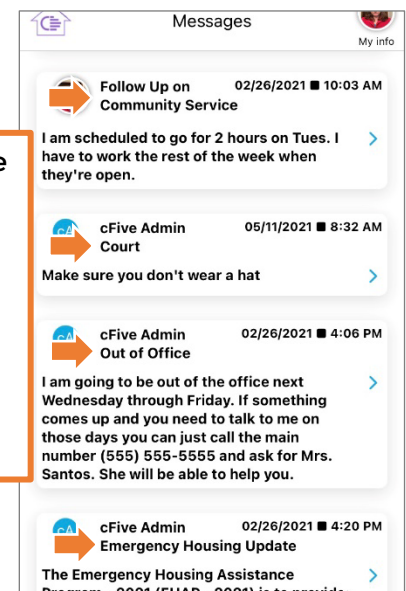
#### The Message Subject Line

1. The subject line helps you and your clients quickly know the basic topic of a message.
  - o Choose subject message titles that fit your typical communication topics. (Such as: Reporting, Programs, Court, Drug Test, Employment, Office Hours, Grades, etc.)
  - o Using similar subject lines with all your clients on your caseload helps you stay organized, and saves you and your clients time when searching and/or reviewing messages.
  - o Did you know... the subject line shows up as a header of the message on the Client App, as well as within their message inbox?



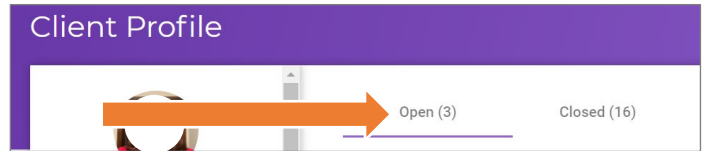
Example of how a subject line appears to the client when they are looking at a message on Catalyst.

Example of how multiple subject lines are displayed in Catalyst. They help the client quickly identify the message topic when they are looking at all of their open messages or past messages.

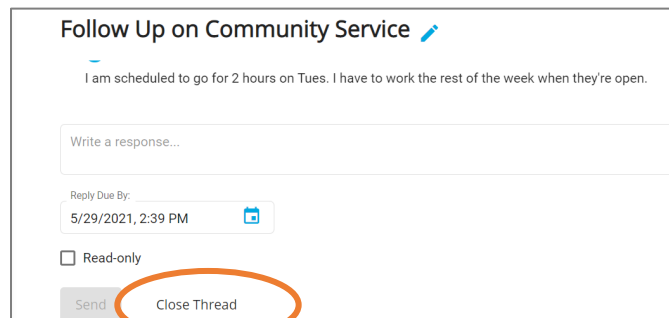


## Message Threads

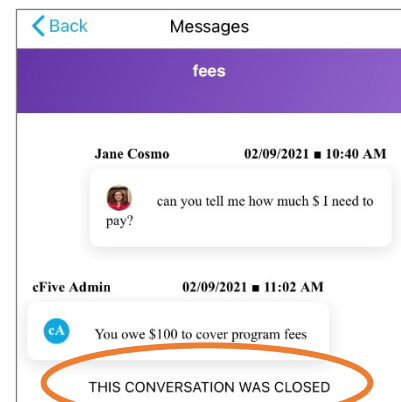
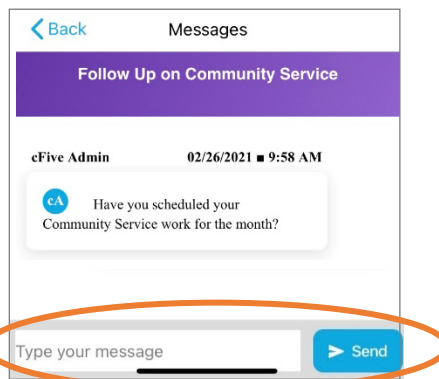
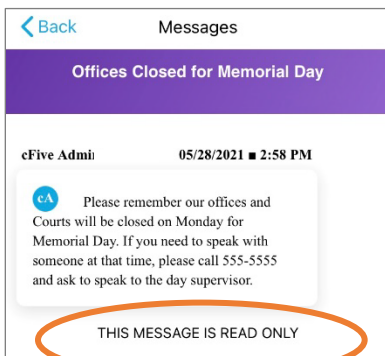
1. On each Client's Message section, Catalyst has two tabs: Open and Closed.



- Open messages are those that are currently active. If they have the appropriate permission, Clients can respond to these messages and case managers can continue to add messages/text in that thread. (Clients cannot respond to messages marked "Read Only".)
  - Case managers and clients cannot respond to, or add additional text to, Closed messages.
2. A case manager should "Close Thread" of messages that do not require a response from the client or further communication. This keeps the client's "Open" message tab on the Officer Portal easy for the case manager to quickly review and navigate. It also helps eliminate outdated messages from appearing in the client's message screen on their smartphone device.



3. When a case manager selects "Close Thread" on any active message, Catalyst moves the message from the Open tab to the Closed tab.
4. When a client opens a message in Catalyst, they will see details about the message. (Examples below show a Read Only message, the box showing the client where to type their response and send to case manager, and Closed message as they appear in the Catalyst app.)



5. Clients see all messages in their Catalyst app (including Closed messages). In their Messages screen they see those for the current month, and can also scroll through all "Past Messages".



Catalyst Messaging helps you keep clients engaged and informed. These best practices will help you optimize your use of Catalyst Messages, as well as help you and your client stay organized and save time.