Getting Started with Catalyst: Quick reference “Step-by-Step” processes

Overview of Client Enrollment Steps

1. Make sure phone is compatible.
2. Make sure you have an accurate/ current phone number.
3. Explain that the app is free to download.
4. The introductory text is sent from the PO from the system for enrollment.
5. The text will contain the login id “username” (clients first name.last name)
6. The text will also contain a link directly to the app in the play store for whatever operating system the clients phone has.
7. The client will hit the specific link and download the app to the phone.
8. Once at login screen, put in the login id, and hit the remember me button.
9. The app will then go to the biometrics screen.
10. The client will “take a selfie” within the oval, the picture will take when the oval turns green.
11. After the “selfie”, the client will go to the voice recognition part of the enrollment.
12. Once at this point, the client will say the phrase “hello catalyst this is my voice”
13. The client will be prompted when to say this phrase. They will need to wait EACH TIME until it registers (look for the check mark). They will repeat the phrase three (3) times.
14. After saying the phrase three (3) times, the app will then authenticate the user and send the Client back to the login screen.
15. When the client goes to login at this point, the screen will say “needs approval”.
16. The PO/Officer/Case Manager will then approve the client in the system and set up the questionnaire dates, appointment dates, or whatever is needed for that specific client.
17. PO/Officer/Case Manager should always send the Client a message after they have verified their image and completed their Enrollment – this launches the Messaging system

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Catalyst: Steps for Enrolling a New Client

1. Click on the word “Enrollment” in purple Catalyst header.
2. Go to the “New Enrollment” button, click. (May have to minimize “Follow Ups List.”)
3. Enter the personal info (* indicates a required field).
4. Enter the demographic info (whatever info is known or desired to track).
5. Enter address, if desired.
6. Hit the “Save and Continue” button.
7. On the next screen, enter the enrollment start date IF it is different than today’s date (do not enter an enrollment end date!).
8. Select the catalyst level “AQM”.
9. Check the “Can Initiate Messages” box.
10. Select the assigned officer.
11. Hit the ““Save and Continue”” button (other fields will populate on their own).
12. At this point, the app will send a SMS/ text message to the client’s phone for enrollment. *If you have entered an email address it will be sent to the email address too.
13. ***See steps for client enrollment process***
14. The next screen is the Enrollment Verification screen. This is where the PO/Officer/Case Manager will verify the client’s photo. and approve their enrollment.
15. Once there is a picture is there, Officer will hit “approve” and then hit the “Save and Continue” button.
16. The next screen is the questionnaire schedule – even if you do not schedule a questionnaire click on the complete enrollment button. (This is what completes the Client’s enrollment.)
17. The app will then redirect you to the client’s individual profile page within the app. (Check to make sure you are the case manager listed in the left-hand column.)

Catalyst: Steps to Create Appointments

1. Go to the Client’s “Client Profile”.
2. PO/Officer/Case Manager can schedule new Appointments from two (2) places: either the Appointment screen (click on the word “Appointment” in the column underneath the client’s name – or – click on the blue button in the top right-hand side of the Client Profile that says “New”).
3. Select the type of appointment.
4. Select the date and time (start and end).

5. Add the address (or select one from the drop-down menu). This ensures the client will be able to access directions to the Appointment.
6. Click the “Save” button.

Catalyst: Steps to Create New Messages

1. Go to the client’s profile.
2. PO/Officer/Case Manager can get to messages from two (2) spots, either click on the word “Messages” in the left-hand column underneath the client’s name – or – click on the blue button in the right-hand side of the screen that says “New”.
3. Enter a Message subject (must have, use keywords to make it easy to search later).
4. Type in the message.
5. Select a “reply by” date/ time. Note: Catalyst automatically inputs a 24-hour “reply by” date/time (from the current time).
6. Select “read only” if you do not want the client to reply to your message.
7. Click “Send”.

Catalyst: Steps to Schedule A Questionnaire

1. Go to Client’s Profile.
2. PO/Officer/Case Manager can get to Questionnaires from two (2) spots, either the Questionnaire screen (select the word “Questionnaire” in the left-hand column underneath the client’s name) – or – click on the blue button in the right-hand side of the screen that says “New”.
3. Click on “New Schedule”.
4. Enter the start/end date.
5. Enter the Frequency of the questionnaire.
6. Enter the day of the month the questionnaire is due by.
7. Enter a complete by time.
8. Select the questionnaire you want to schedule.
9. Click the “Save” button.