PENELOPE PREP - TO DO #1

Your Schedule On Steroids!

Finally our scheduling capacity will get a long awaited boost. Nothing is clearer than having only one calendar to look at for all your different work related activities.

Penelope's "Availability" module is impressive and quite flexible. Availability Types are defined at the company level. Those are then made available to all workers (therapist) to include in their "Calendar". See the legend to the right of this column showing the colour coding for each activity. Please note this was created only for testing purposes and the final activities may very well be different from what you are currently seeing.

There are two types of Activities: calendar blocking (such as a client session or a free consultation) that will prevent any other activity to be booked on that specific time duration, and there are calendar non-blocking ones (such as report writing, reservation of an assessment kit beyond the time of the assessment testing administration session) which allow booking activities during the same duration.

Assessment Bookings ONLY	Service Event
Available	First Service Event
ClientConnect ONLY (tele therapy)	Group Event
Free Consultation 30mins ONLY	First Group Event
GBT Testing 2h ONLY	Informal Event
In-Person ONLY	Indirect Event
Prefer New Clients	Not Available
Supervision	

Start thinking about what your schedule will look like

By nature, some of those activities can be billed to clients or not. Additionally, some of them can be booked by clients through ClientConnect while other ones may only be booked by therapists and Admin: "Supervision" should only be available to book by therapists, their supervisors or Admin.

Back to the concept of "calendar". A calendar is actually a set of availabilities that either is "Default" (which is valid indefinitely) or you can set multiple calendars that would then have set start and end dates (i.e.: summer availability).

Worker Profile

Profile Clinical Availability

Daniel Dubreuil

Calendar

Name: Default User Calendar Effective Mar-10-2021

Weekly Availability

Day	From	To	Description
Monday	8:00 AM	12:00 PM	In-Person ONLY
Monday	1:00 PM	5:00 PM	ClientConnect ONLY (tele therapy)
Tuesday	12:00 PM	5:00 PM	In-Person ONLY
Wednesday	12:00 PM	2:00 PM	Free Consultation 30mins ONLY
Wednesday	2:00 PM	9:00 PM	Assessment Bookings ONLY
Thursday	9:00 AM	11:00 AM	Free Consultation 30mins ONLY
Thursday	1:00 PM	3:00 PM	Supervision
Thursday	3:00 PM	5:00 PM	Assessment Bookings ONLY
Thursday	5:00 PM	9:00 PM	ClientConnect ONLY (tele therapy)
Friday	9:00 AM	5:00 PM	ClientConnect ONLY (tele therapy)
Saturday	9:00 AM	12:00 PM	GBT Testing 2h ONLY

As you can see in the example of Worker Profile above, the Calendar of Availabilities is quite detailed with different types of activities. This illustrates how granular one can be with their calendar(s).

Start Planning

It is definitely not too early to start thinking about what your availabilities will look like. Actually, we'd like to be able to enter those in Penelope by the end of July. Of course we can change them should there be changes before the Go-Live date. Ask yourself:

1. What days and hours would I like to work? Should I just keep the same schedule?
2. Do I need a room at the office on certain days or will I be only doing teletherapy?
3. What are all the activities (client facing or not) do I want included in my schedule? Be creative!
4. How each day (hour per hour) would look like?

Talk to your Centre Director

It would be a very good idea to ensure you talk to your immediate supervisor about your plan. They may have specific requirements.

Once you're all set, you should communicate your plan to either Lila Hakim or Aleks Milosevic to ensure rooms and/tools are available when you require them. Centre Directors may also have helpful insights.

When your plan is finalized, then the Centre Directors will communicate them to the CFIR Transition Team.

Trial & Finalize

The CFIR Transition Team will enter your plan in Penelope. It will be tested for functionality and ensure clients can book through the ClientConnect portal according to your indications.

It is possible that all your wishes might require some tweaking in Penelope and this last phase will identify all items that will need revision.

Once all is tested and pass all checkpoints, your calendar will be set.

Have different availabilities for the Holidays? Or starting January 2022? No problem, you'll let us know as soon as possible so your clients can book future appointments accordingly.