



PENELOPE - TIME SENSITIVE INFO & PREP - TO DO #4

Getting all the pieces together

IMPORTANT NEW INFORMATION

NEW GO-LIVE DATE: NOVEMBER 6, 2021

We entered the portion of the project where we are planning the first upload of some information to the Penelope Database.

While comparing the data from CFIR's Quickbooks and Penelope, the Penelope team identified missing information necessary for the database to function properly. Having a go-live of early October would not allow us to retrieve the missing information and update the client accounts in Quickbooks.

SUPPLEMENTARY CLIENT INFO TO COMPILE

Penelope is incredibly flexible but that flexibility does require

that we feed it details our financial system did not need. The new accounts created as of April 2021 and for which we received the Initial Intake Form most probably already have the information required. Those received via Psychology Today or other means will most probably be missing some.

What is being asked?

Using the same file that was put in your private folder to determine which client to migrate (To Do #2), please add for each line:

- A. Date of birth
- B. Service Item (as shown in the following page)

- C. Gender (if it differs from "Female" or "Male as shown in the following page).

What if we really don't have the information?

Then we will have to populate with default values at the moment of migration. Some of those default values like the date of birth (let's say a default of 1900-01-01) could be corrected by clients, but other information like the Service Items cannot be changed by clients and must be corrected or updated from the backend prior to the go-live.

INFORMATION TO COMPILE

1 INDIVIDUAL INFO REQUIRED

In Penelope, each Individual of a Case MUST have a separate entry, even if they are coming for couples therapy, therefore each individual must have:

1. **DATE OF BIRTH** Mandatory for use of the client portal ClientConnect. If not provided, **1900-01-01** will be automatically assigned. Once clients have access to ClientConnect, they will be able to modify the date for the correct date of birth. Date of birth may be found in the last page of each of the Consent For Treatment.
2. **EMAIL ADDRESS** Mandatory for use of the client portal ClientConnect. Each individual MUST have a different email address to be able to access ClientConnect. We currently have a “Main” email address which, for individuals would be migrated as is. For couples, sometimes we cannot confirm to which one of the partners they belong to.
3. **SERVICE ITEM** If you started the video training courses you will recognize this vocabulary. Service items are items that behave more or less in the same fashion as the CFIR website filters (attached to each therapists, found in the Initial Intake form to find available therapists, etc.) Those are consistent throughout the lifecycle of a CASE in Penelope: intake process, therapist assignment, case service assignment, clinical notes access rights, billing, etc... Those are:

- THERAPY SERVICE ITEMS -

- Adolescent Psychology
- Adoption Therapy
- Anger & Emotion Regulation
- Anxiety & Stress
- Attention Deficit & Learning Challenges
- Career & Workplace
- Child Psychology

- Couples Therapy
- Depression, Mood & Grief
- Eating, Weight & Body Image
- Family Psychology
- Fertility Counselling
- Forensic
- Health Psychology
- Interpersonal Relationships
- Multicultural
- Neuropsychology

- Obsessive Compulsive
- Personality
- Rehabilitation Psychology
- Self-Growth & Self-Esteem
- Sex Therapy
- Sexual Addiction
- Sexuality, Gender & Relationship Diversity
- Substance Use
- Trauma Psychology

- ASSESSMENT SERVICE ITEMS -

- Adoption Assessment
- Alcohol & Drug Evaluation
- Attention Deficit & ADHD
- Autism Spectrum & Developmental Disorder
- Career & Vocational Assessment

- Couples & Pre-marital Assessment
- Disability, Injury & Accident
- Fertility & Third-party Reproduction
- Forensic Assessment
- Immigration & Refugee
- Neuropsychological Assessment

- Personality & Interpersonal Functioning
- Psychodiagnosis & Mental Health
- Psychoeducation
- Risk Assessment
- Sexological Assessment
- Trauma & Dissociation Assessment

4. **GENDER** Mandatory information. service assignment, clinical notes access rights, billing, etc... By default, “FEMALE” or “MALE” will be assigned to each individual. If your client specified a gender please select the known gender from

- Agender
- Androgyne
- Cis-Female
- Cis-Male
- Female
- Feminine-presenting
- Gender questioning
- Genderfluid
- Genderqueer
- Intergender

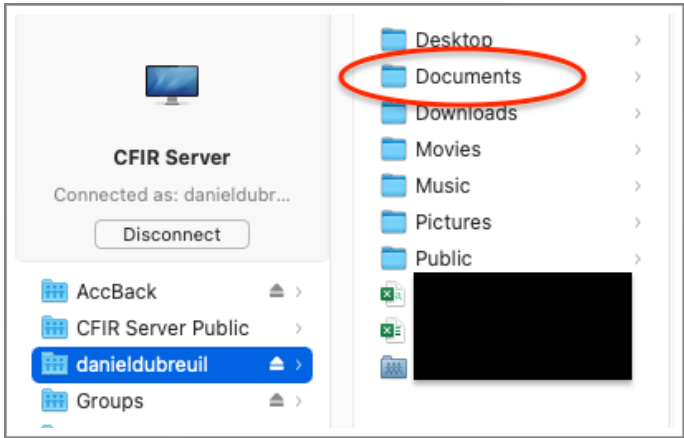
- Intersex
- Male
- Masculine-presenting
- Multi-gender
- Nonbinary
- Novigender
- Pangender
- Polygender
- Third gender
- Transexual: Female-to-male (FTM)

- Transexual: Male-to-female (MTF)
- Transitioning
- Trigender
- Two-spirit
- Transgender
- Trans Man
- Trans Woman

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Put it in the Migration file already provided

1. First map your folders on the CFIR server, then under your own private folder (where you would put your session notes), you will see the DOCUMENTS folder where the file was saved.



2. Open the file "...TO DO #2 _Migration List To Revise By AUGUST 10 2021..."
3. At the end of each line corresponding to a client account you said YES to migrate to Penelope, put the missing information you could find in the documents available to you. See the exemple below:

	A	B	C	D	E	F	G	H	I
1	Client Account	Migrate to Penelope for Oct 01. 2021? YES / NO ?			Special Comments				
2	Fritz Dubreuil	Yes				1965-08-04 fritz.dubreuil@me.com	Depression, Mood & Grief	Nonbinary	
3									
4									

4. Let Daniel know the file is updated and ready to be processed. Email : pa@cfir.ca

THANK YOU!

For your amazing participation and
for helping us making this a smoother transition!

From the CFIR Penelope Transition Team