Hi !

It's time to start exploring Penelope!

Although the official training videos from the Penelope team are not out yet (dates to be provided soon), we thought you might enjoy logging in and checking the interface, your availability, your profile information, etc…

Should you have not yet done the Penelope/SocialSolutions Learning Academy courses, please start them in conjunction with this. (https://socialsolutions.litmos.com)

First, let's get you in the system.

We will give you access to the Production database; this means it is the one that you will be working with as of January 31st. It contains all the latest updates.

Production Penelope Login: https://cfir.athena-ca.com

You will then have to reset your password. Click on Reset Account Password under the Login button.

Then, enter your username: ****

An email with a password reset PIN will be sent to your CFIR email address. Please enter in in the corresponding field.

You will be prompted to create a new password. Follow the indications for a strong password: passwords MUST be "strong" otherwise Penelope will not accept it.

After successfully created the strong password, you will be asked to created and answer 3 security questions/passwords. Keep all that info as you will be required to answer them from time to time. You should be in the system.

Check your profile details.

Now you should be in and seeing your "My Home" page. Once we have all the client accounts uploaded, you will see the corresponding cases listed there.

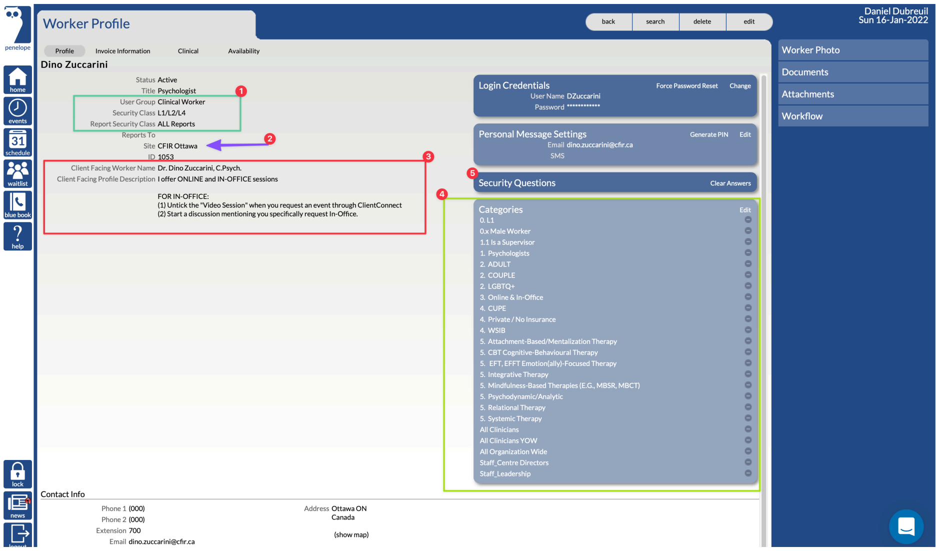
The exercise at this point is to verify that the information in your worker profile is accurate, and flag any changes to us at penelope@cfir.ca (Note: changes in the Clinical Tab, Assigned Services must be authorized by your supervisor and/or your Centre Director first).

MY PROFILE

On the right hand side, you have toggles and the first one is "My Profile". Click on it. The menu opens up and you can find links. Click on "View My Profile".

For exemple let's use Dino's profile. See the corresponding points in the picture.

PROFILE TAB



❶ This box establishes the type of user, security accesses and reports access.

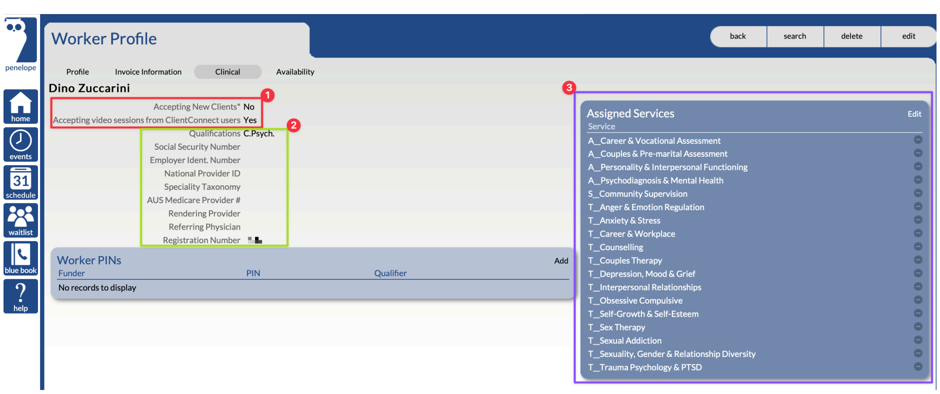
❷ This is your home site. This will not change even if you see clients remotely from the other location.

❸ Client Facing Info. This will appear in ClientConnect

❹ Categories. Those work like the filters found on the CFIR website under Ottawa Team and Toronto Team pages. They are necessary for Admin to filter workers efficiently. The entire list is rather exhaustive. Some of these categories also function as internal distribution lists for Discussions and Messages: they must be used sparingly and carefully.

❺ Security Questions. Once filled out the questions will appear but not the answers. They can be deleted by the System Administrator should you not remember the answers. You would then have to select bran new ones at your next login.

CLINICAL TAB

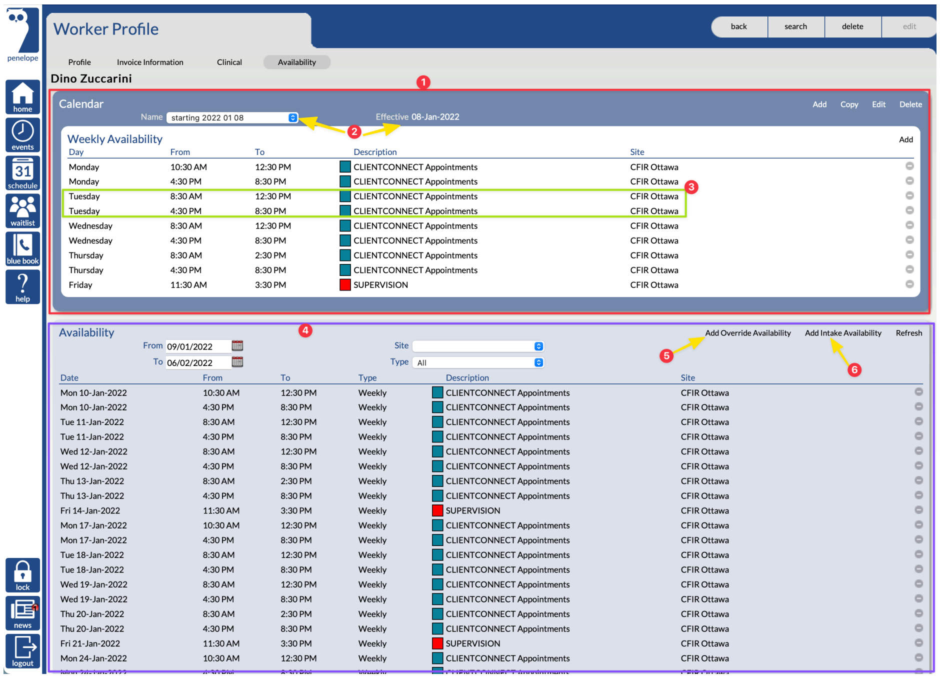


❶ This is where we can establish if you are taking new clients or not, if you are taking teletherapy sessions or not.

❷ This section is primordial for the Invoice Document creation and it should not be changed.

❸ Assigned Services. Those correspond to the services found on the CFIR website. If you do not have a service listed there, you will not be assigned clients requesting that type of service. “A__” introduces an Assessment service, “T__” introduces a Therapy service, “S__” introduces other types of services such as "S__Free Consultation".

AVAILABILITY TAB



❶ This is the master weekly availability.

❷ There can be as many calendars as you wish; it makes changes in availability very easy, flexible and seamless.

❸ Oh! And if you have 5 different availabilities in one day (supervision, free consults, assessments, therapy, meetings), yeah, it is possible and it works like a charm! Below are all the availability types but ONLY "CLIENTCONNECT Appointments" are bookable by clients through ClientConnect.

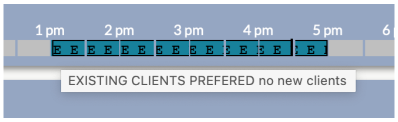
Worker Availability Types

Colour	Existing Type
Green	GBT Administration 2h
Orange	IN-PERSON only
White	FREE CONSULTATION 30mins ONLY
Pink	ASSESSMENTS only
Red	SUPERVISION
Blue	CLIENTCONNECT Appointments
Pink	OFF
White	AVAILABLE
Orange	GBT (2h) or Assessment
Red	Intake Coordinator
Pink	END

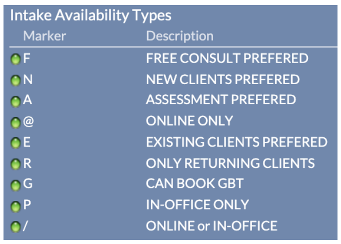
❹ Availability. This is the daily rendition of the point ❶ above.

❺ Add Override Availability. This would be used to add one or several days off, book off due to a workshop, etc… whilst maintaining the current calendar valid.

❻ Add Intake Availability. While the name may suggest something its function is a bit different. Intake availability is used to add more information to an otherwise not complete availability. Here is an exemple: the intake availability "E Existing Clients Preferred no new clients" has been added to a therapist's schedule on a certain day from 1:30pm to 5:30pm. When Admin tries to book a client with that therapist, they will see the marker "E" superposed to the regular ClientConnect Appointments availability. By hovering they will see the message revealing what type of availability that is. Please note this is NOT visible to clients booking through ClientConnect.



Here is the entire list of Intake availability



Intake Availability Types

Marker	Description
F	FREE CONSULT PREFERED
N	NEW CLIENTS PREFERED
A	ASSESSMENT PREFERED
@	ONLINE ONLY
E	EXISTING CLIENTS PREFERED
R	ONLY RETURNING CLIENTS
G	CAN BOOK GBT
P	IN-OFFICE ONLY
/	ONLINE or IN-OFFICE

CALENDAR

One thing you will want to explore right away is how your calendar is showing. On the right hand side of the screen from any page you will see the vertical tray :

MESSAGES

For all notifications, discussions, etc…

WORKFLOW

For all tasks

CALENDAR

All your events (client-facing events, client related events, meetings, supervisions, etc..

Currently empty if or with some meetings or supervision. Client appointments will be entered manually a few days prior to January 31st.

Again, keep exploring until we have the training videos. At any moment you can get the extensive Penelope help documents by clicking the Help button found on the left hand side of any window.

Please keep a list of your questions; the training videos will answer most of them and we will be more than happy to answer those not covered.

Happy exploring!

The CFIR Transition Team.