
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

Worker Profile

Dino Zuccarini

Status: Active
Title: Psychologist
User Group: Clinical Worker
Security Class: LLL/2/4
Report Security Class: ALL Reports
Reports to: [blank]
Site: CFIR Ottawa
ID: 2053

Client Facing Worker Name: Dr. Dino Zuccarini, C.Psych.
Client Facing Profile Description: I offer ONLINE and IN-OFFICE sessions

FOR IN-OFFICE:
(1) Unlick the "Video Session" when you request an event through ClientConnect
(2) Start a discussion mentioning you specifically request In-Office.

Login Credentials
User Name: DZuccarini
Password: [masked]
Forgot Password? Reset Change

Personal Message Settings
Email: dino.zuccarini@cfir.ca
Generate PIN: [blank] Edit

Security Questions
Clear Answers

Categories

Category	Edit
0. L1	
0.4 Male Worker	
1.1 Is a Supervisor	
1. Psychologists	
2. ADULT	
2. COUPLE	
2. LGBTQ+	
3. Online & In-Office	
4. CURE	
4. Private/No Insurance	
4. WSIB	
5. Attachment-Based/Mentalization Therapy	
5. CBT Cognitive-Behavioural Therapy	
5. EFT/EMFT Emotionally-Focused Therapy	
5. Integrative Therapy	
5. Mindfulness-Based Therapies (E.G. MBCT, MBSR)	
5. Psychodynamic/Analytic	
5. Relational Therapy	
5. Systemic Therapy	
All Clinicians	
All Clinicians YOW	
All Organization Wide	
Staff, Centre Directors	
Staff Leadership	

Contact Info

Phone 1: (800) [blank]
Phone 2: (800) [blank]
Extension: 700
Email: dino.zuccarini@cfir.ca

Address: Ottawa ON
Canada
(show map)

- 1 This box establishes the type of user, security accesses and reports access.
- 2 This is your home site. This will not change even if you see clients remotely from the other location.
- 3 Client Facing Info. This will appear in ClientConnect
- 4 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.
- 5 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 brand new ones at your next login.

CLINICAL TAB

Worker Profile

Dino Zuccarini

Accepting New Clients? No
Accepting video sessions from ClientConnect users? Yes

Qualifications: C.Psych.

Social Security Number
Employer Ident. Number
National Provider ID
Specialty Taxonomy
AUS Medicare Provider #
Referring Physician
Registration Number

Worker Pins

Funder	PIN	Qualifier	Add
No records to display			

Assigned Services

Service	Edit
A_Career & Vocational Assessment	
A_Couples & Pre-marital Assessment	
A_Personality & Interpersonal Functioning	
A_Psychodiagnosis & Mental Health	
S_Community Supervision	
T_Anger & Emotion Regulation	
T_Anxiety & Stress	
T_Career & Workplace	
T_Counseling	
T_Couples Therapy	
T_Depression, Mood & Grief	
T_Interpersonal Relationships	
T_Obsessive Compulsive	
T_Self-Growth & Self-Esteem	
T_Sex Therapy	
T_Sexual Addiction	
T_Sexuality, Gender & Relationship Diversity	
T_Trauma Psychology & PTSD	

- 1 This is where we can establish if you are taking new clients or not, if you are taking teletherapy sessions or not.
- 2 This section is primordial for the Invoice Document creation and it should not be changed.

③ 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

Worker Profile | back | search | delete | edit

Dino Zuccarini

Calendar | Name: starting 2022 01 08 | Effective: 08-Jan-2022 | Add | Copy | Edit | Delete

Weekly Availability

Day	From	To	Description	Site
Monday	10:30 AM	12:30 PM	CLIENTCONNECT Appointments	CFIR Ottawa
Monday	4:30 PM	8:30 PM	CLIENTCONNECT Appointments	CFIR Ottawa
Tuesday	8:30 AM	12:30 PM	CLIENTCONNECT Appointments	CFIR Ottawa
Tuesday	4:30 PM	8:30 PM	CLIENTCONNECT Appointments	CFIR Ottawa
Wednesday	8:30 AM	12:30 PM	CLIENTCONNECT Appointments	CFIR Ottawa
Wednesday	4:30 PM	8:30 PM	CLIENTCONNECT Appointments	CFIR Ottawa
Thursday	8:30 AM	2:30 PM	CLIENTCONNECT Appointments	CFIR Ottawa
Thursday	4:30 PM	8:30 PM	CLIENTCONNECT Appointments	CFIR Ottawa
Friday	11:30 AM	3:30 PM	SUPERVISION	CFIR Ottawa

Availability | From: 09/01/2022 | To: 06/02/2022 | Site: | Type: All | Add Override Availability | Add Intake Availability | Refresh

Date	From	To	Type	Description	Site
Mon 10-Jan-2022	10:30 AM	12:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Mon 10-Jan-2022	4:30 PM	8:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Tue 11-Jan-2022	8:30 AM	12:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Tue 11-Jan-2022	4:30 PM	8:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Tue 12-Jan-2022	8:30 AM	12:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Wed 12-Jan-2022	4:30 PM	8:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Thu 13-Jan-2022	8:30 AM	2:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Thu 13-Jan-2022	4:30 PM	8:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Fri 14-Jan-2022	11:30 AM	3:30 PM	Weekly	SUPERVISION	CFIR Ottawa
Mon 17-Jan-2022	10:30 AM	12:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Mon 17-Jan-2022	4:30 PM	8:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Tue 18-Jan-2022	8:30 AM	12:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Tue 18-Jan-2022	4:30 PM	8:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Wed 19-Jan-2022	8:30 AM	12:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Wed 19-Jan-2022	4:30 PM	8:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Thu 20-Jan-2022	8:30 AM	2:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Thu 20-Jan-2022	4:30 PM	8:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa
Fri 21-Jan-2022	11:30 AM	3:30 PM	Weekly	SUPERVISION	CFIR Ottawa
Mon 24-Jan-2022	10:30 AM	12:30 PM	Weekly	CLIENTCONNECT Appointments	CFIR Ottawa

① This is the master weekly availability.

② There can be as many calendars as you wish; it makes changes in availability very easy, flexible and seamless.

③ 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.

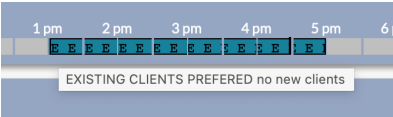
Worker Availability Types	
Colour	Existing Type
Green	GBT Administration 2h
Orange	IN-PERSON only
White	FREE CONSULTATION 30mins ONLY
Pink	ASSESSMENTS only
Red	SUPERVISION
Blue	CLIENTCONNECT Appointments
Pink	OFF
White	AVAILABLE
Orange	GBT (2h) or Assessment
Red	Intake Coordinator
Pink	END

④ Availability. This is the daily rendition of the point ① above.

⑤ 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.

⑥ 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 PREFERRED
N	NEW CLIENTS PREFERRED
A	ASSESSMENT PREFERRED
@	ONLINE ONLY
E	EXISTING CLIENTS PREFERRED
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.

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