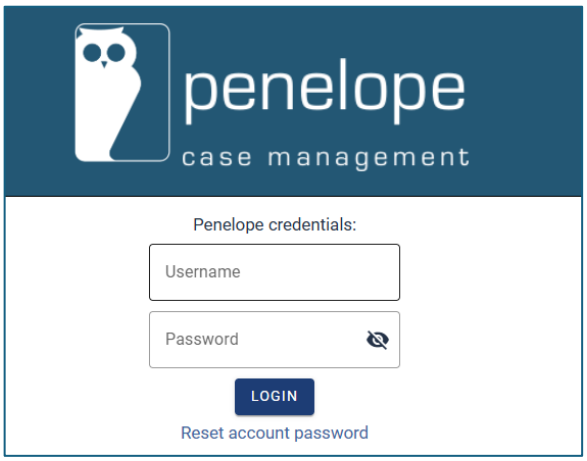
Mental health,

understood.

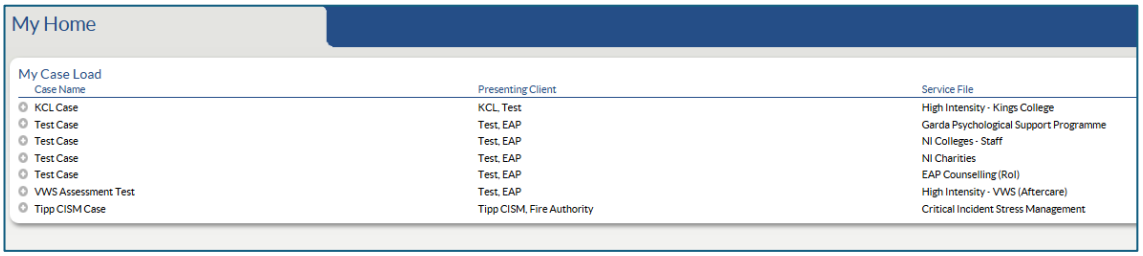
Penelope: How to add service unit to existing session

This document provides step-by-step instructions on how to add service unit to existing session.

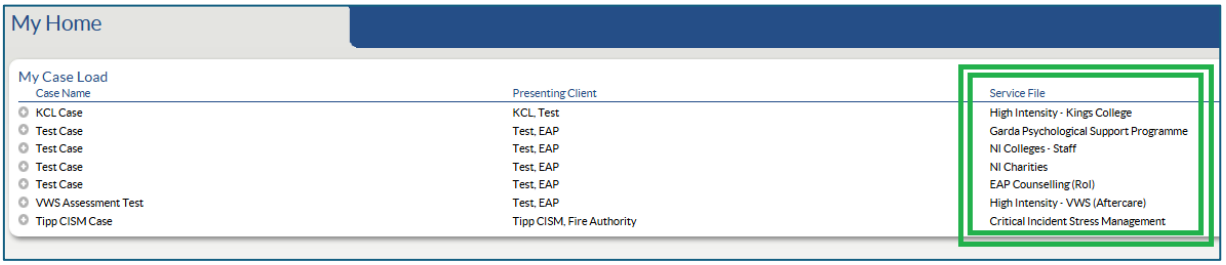
Login to Penelope using your credentials (Username and Password):



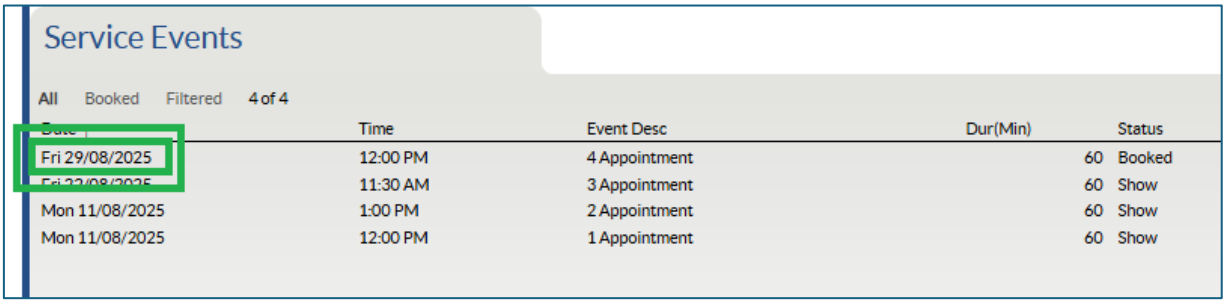
My Home screen displays your current caseload:



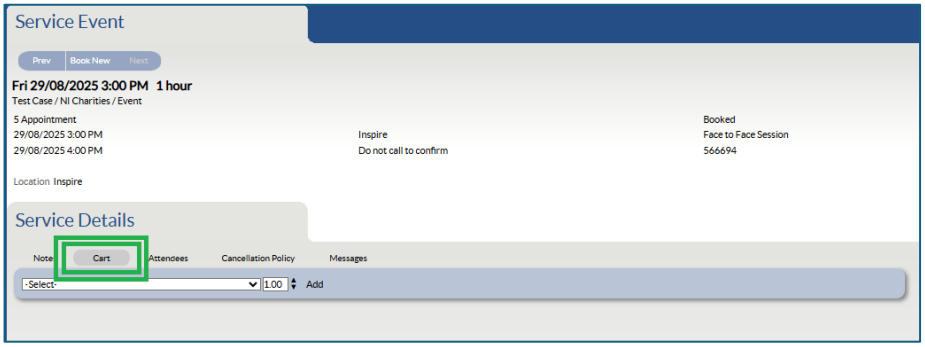
Click on the **Service File** (Penelope term for referral) to view the referral details:



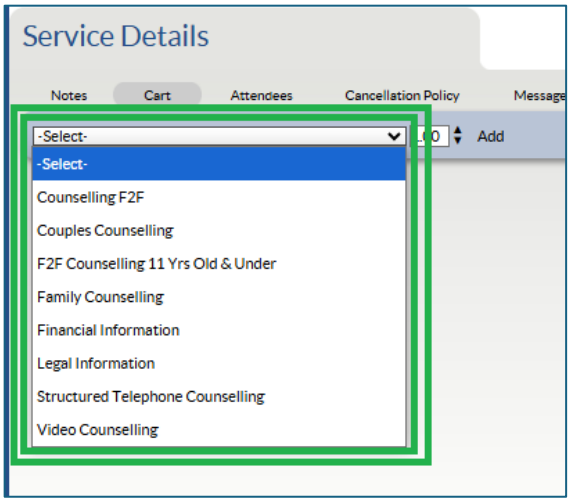
Click the **Service Event** you would like to add service unit to:



Click **Cart**:



Select the appropriate **Service Unit** (Penelope term for mode of counselling) using the drop-down list:



It is important to click **Add** to save and add the Service Unit into the session cart. The Service Unit will be displayed as shown below. One service unit is required for each session.

To remove an incorrect or extra service unit, click on Remove beside the service unit to be deleted.

Service Details
Notes
Cart
Attendees
Cancellation Policy
Messages
-Select-
1.00
Add
Cart Items will be billed to the Client
1.00 hour Counselling F2F (011203)
Remove
Billing
Payor
Type
Invoice
Auth
Test, EAP
FFS