

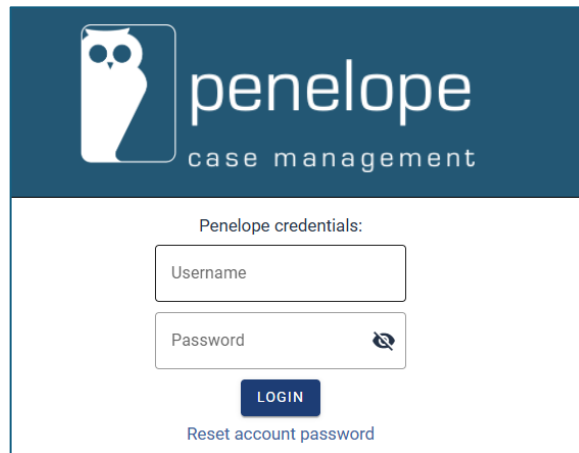
Mental health,
understood.



Penelope: How to close referral

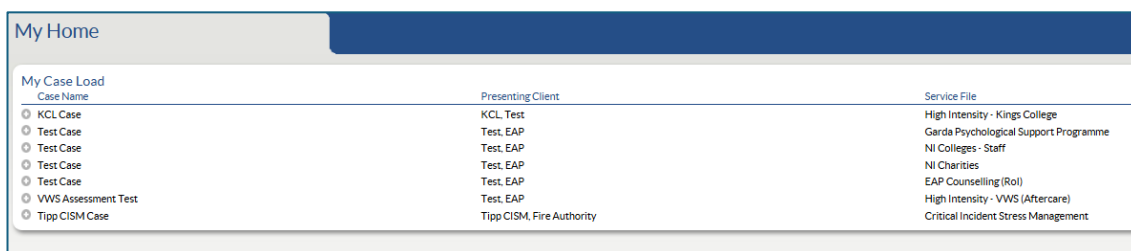
This document provides step-by-step instructions on how to close referral at end of counselling. Please note, the attendance must be recorded for all sessions before referral can be closed.

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



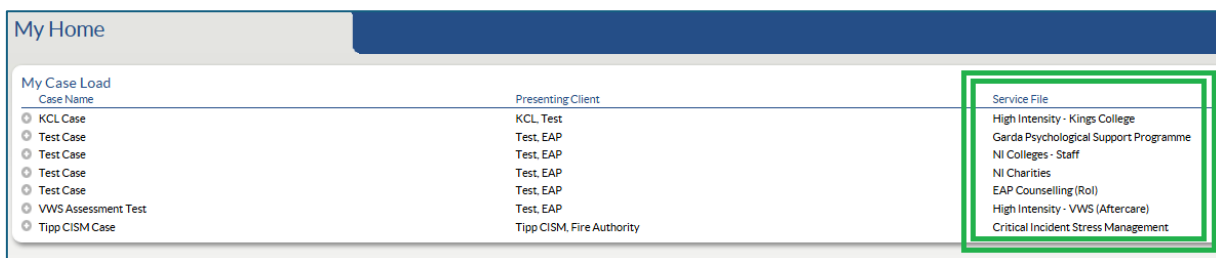
The login screen features the Penelope owl logo and the text 'penelope case management'. Below this, it asks for 'Penelope credentials:' and provides two input fields: 'Username' and 'Password' (with a visibility toggle icon). A blue 'LOGIN' button is positioned below the password field, and a link for 'Reset account password' is located at the bottom.

My Home screen displays your current caseload:



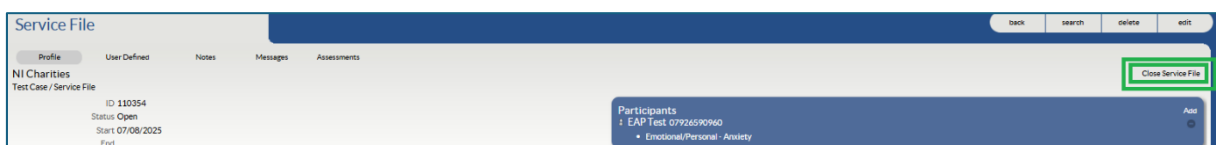
Case Name	Presenting Client	Service File
<input type="radio"/> KCL Case	KCL Test	High Intensity - Kings College
<input type="radio"/> Test Case	Test, EAP	Garda Psychological Support Programme
<input type="radio"/> Test Case	Test, EAP	NI Colleges - Staff
<input type="radio"/> Test Case	Test, EAP	NI Charities
<input type="radio"/> Test Case	Test, EAP	EAP Counselling (Rol)
<input type="radio"/> VWS Assessment Test	Test, EAP	High Intensity - VWS (Aftercare)
<input type="radio"/> Tipp CISM Case	Tipp CISM, Fire Authority	Critical Incident Stress Management

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



The 'My Home' screen is shown with a green box highlighting the 'Service File' column of the caseload table.

Click **Close Service File**:



The 'Service File' screen shows details for a case. It includes tabs for Profile, User Defined, Notes, Messages, and Assessments. The main content area displays 'NI Charities' and 'Test Case / Service File' with ID 110354, Status Open, and Start date 07/08/2025. A 'Close Service File' button is highlighted with a green box. A 'Participants' section shows 'EAP Test, 07926590960' with a sub-category of 'Emotional/Personal - Anxiety'.

Enter **Close Date**, you can type a date or click on calendar icon and select a date:

Edit

Close Service File

Close Date: dd/mm/yyyy

Close Reason: Planned - Agreed during Therapy

Close Notes

NOTE: Please select a close date that is later than all non-cancelled service events.

cancel save

Select the appropriate **Close Reason** using the drop-down list:

Edit

Close Service File

Close Date: dd/mm/yyyy

Close Reason: Planned - Agreed during Therapy

Close Notes

NOTE: Please select a close date that is later than all non-cancelled service events.

- Select
- K&L - Cancelled by Customer
- Planned - Agreed at end of Therapy
- Planned - Agreed during Therapy
- Planned - Assessment Completed
- Planned - Other
- Planned - Planned from Outset
- SMC ONLY - Planned Aftercare Provided
- SMC ONLY - Unable to contact Aftercare provided
- SMC ONLY - Unplanned non att Aftercare provided
- Unplanned - Client did not wish to continue
- Unplanned - Did not attend Triage
- Unplanned - Due to Crisis
- Unplanned - Non Attendance
- Unplanned - Other
- Unplanned - Unable to Contact

Enter **Close Notes** if applicable, click **Save**

Edit

Close Service File

Close Date: dd/mm/yyyy

Close Reason: Planned - Agreed during Therapy

Close Notes

NOTE: Please select a close date that is later than all non-cancelled service events.

cancel save