

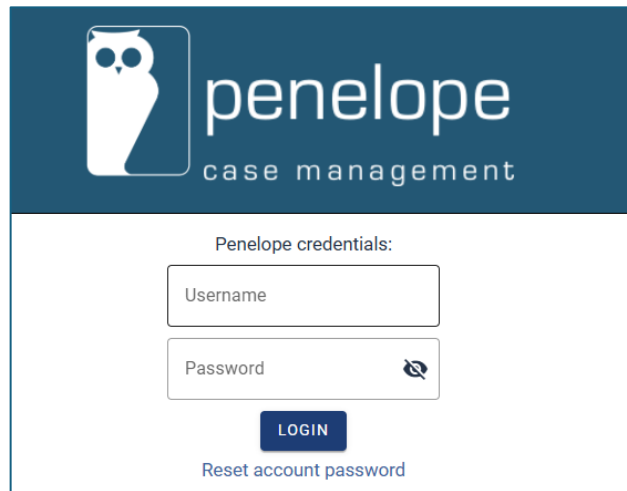
Mental health,  
understood.



Penelope: How to send Coming to Counselling Contract

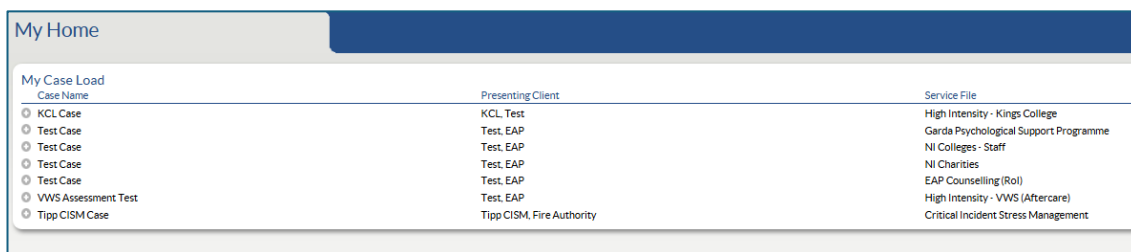
This document provides step-by-step instructions on how to send the Coming to Counselling Contract to client before your first session.

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



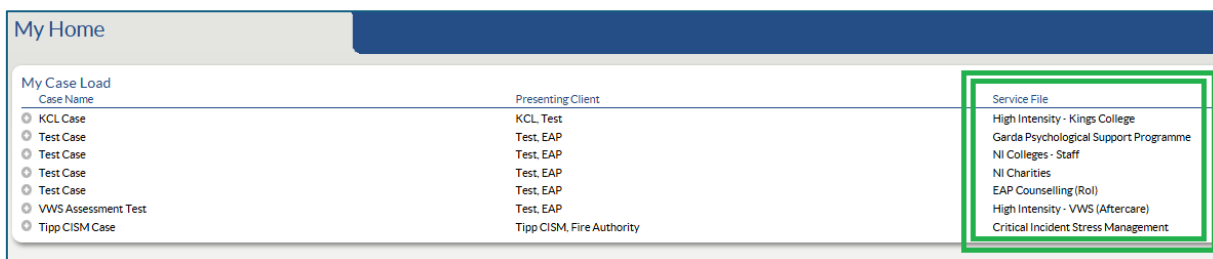
The login screen features the Penelope logo (an owl) and the text 'penelope case management'. Below this, it says 'Penelope credentials:' followed by two input fields: 'Username' and 'Password'. A 'LOGIN' button is positioned below the password field, and a 'Reset account password' link is located at the bottom.

**My Home** screen displays your current caseload:



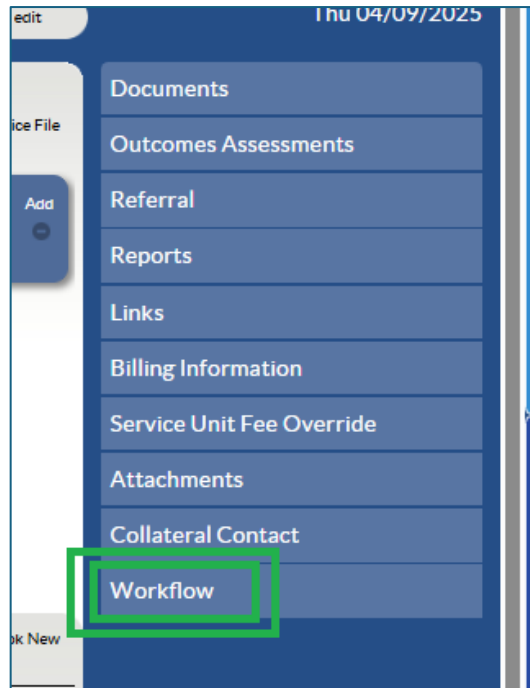
Case Name	Presenting Client	Service File
<input type="radio"/> KCL Case	KCL Test	High Intensity - Kings College
<input type="radio"/> Test Case	Test, EAP	Garda Psychological Support Programme
<input type="radio"/> Test Case	Test, EAP	NI Colleges - Staff
<input type="radio"/> Test Case	Test, EAP	NI Charities
<input type="radio"/> Test Case	Test, EAP	EAP Counselling (RoI)
<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:

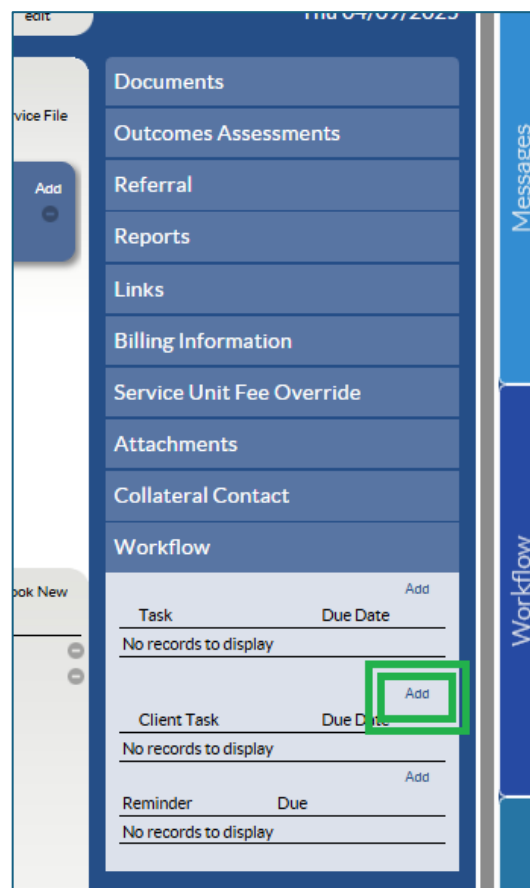


Case Name	Presenting Client	Service File
<input type="radio"/> KCL Case	KCL Test	High Intensity - Kings College
<input type="radio"/> Test Case	Test, EAP	Garda Psychological Support Programme
<input type="radio"/> Test Case	Test, EAP	NI Colleges - Staff
<input type="radio"/> Test Case	Test, EAP	NI Charities
<input type="radio"/> Test Case	Test, EAP	EAP Counselling (RoI)
<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 **Workflow** on right-hand side of screen:



The Workflow menu is displayed. Click on **Add** beside **Client Task**:



Complete the following actions in pop-up window:  
**Assigned To:** Select the **client's name** using the drop-down list  
**Subject:** Type in **Coming to Counselling Contract**

**Messages:** Type in message you would like the client to receive

**Forms:** Check the box beside **General Coming to Counselling Contract** to select this form

**Save:** Click save to send the contract to the client

The screenshot shows a 'New Client Task' form with the following elements:

- Assigned To:** A dropdown menu with 'Select' as the current selection.
- Subject:** A text field containing 'Coming to Counselling Contract'.
- Messages:** A text area containing the message: 'Please review the Coming to Counselling Contract prior to our first session. Thanks,|'
- Followers:** A section with a search bar, a dropdown menu set to '-Select-', and the name 'Rooney, Aileen'.
- Forms:** A section with a list of forms, where 'General Coming to Counselling Contract' is checked. Other forms include 'Core10 - 1 Initial', 'Core10 - 2 Progress', 'Core10 - 3 Close', 'GAD - 7 Initial', 'GAD - 7 Final', 'PCL-5 - Close', 'PCL-5 - Initial', 'PCL-5 - Progress', 'PHQ - 9 Close', and 'PHQ - 9 Initial'.
- Buttons:** 'cancel' and 'save' buttons at the bottom.