

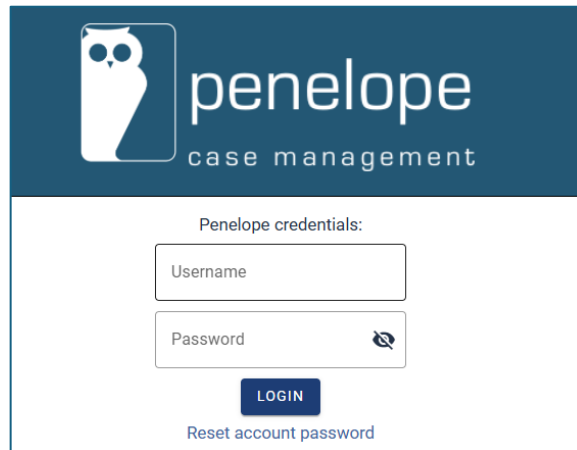
# Mental health, understood.



Penelope: How to add service unit to existing session

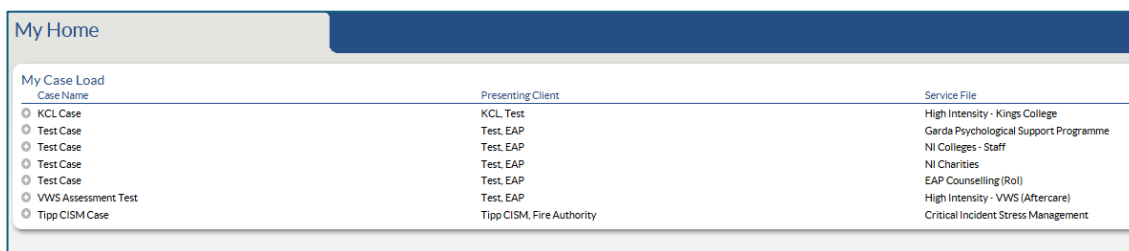
This document provides step-by-step instructions on how to add service unit to existing session.

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



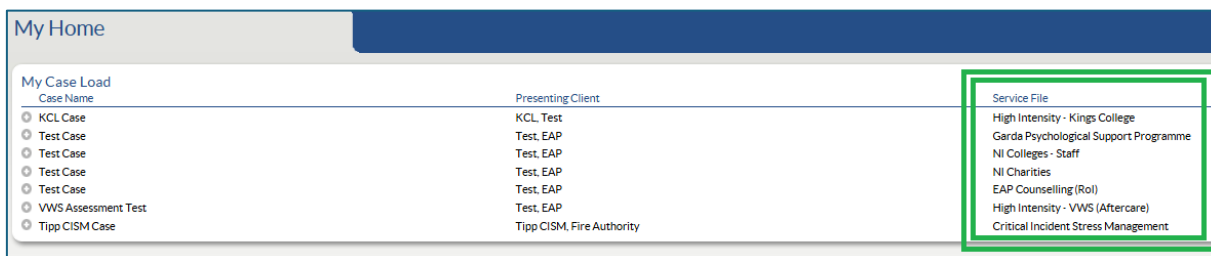
The login screen features the Penelope logo (an owl) and the text 'penelope case management'. Below this, it says 'Penelope credentials:' followed by two input fields: 'Username' and 'Password'. A 'LOGIN' button is positioned below the password field, and a link for 'Reset account password' is at the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

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



My Case Load	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:



My Case Load	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)
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<input type="radio"/> Tipp CISM Case	Tipp CISM, Fire Authority	Critical Incident Stress Management

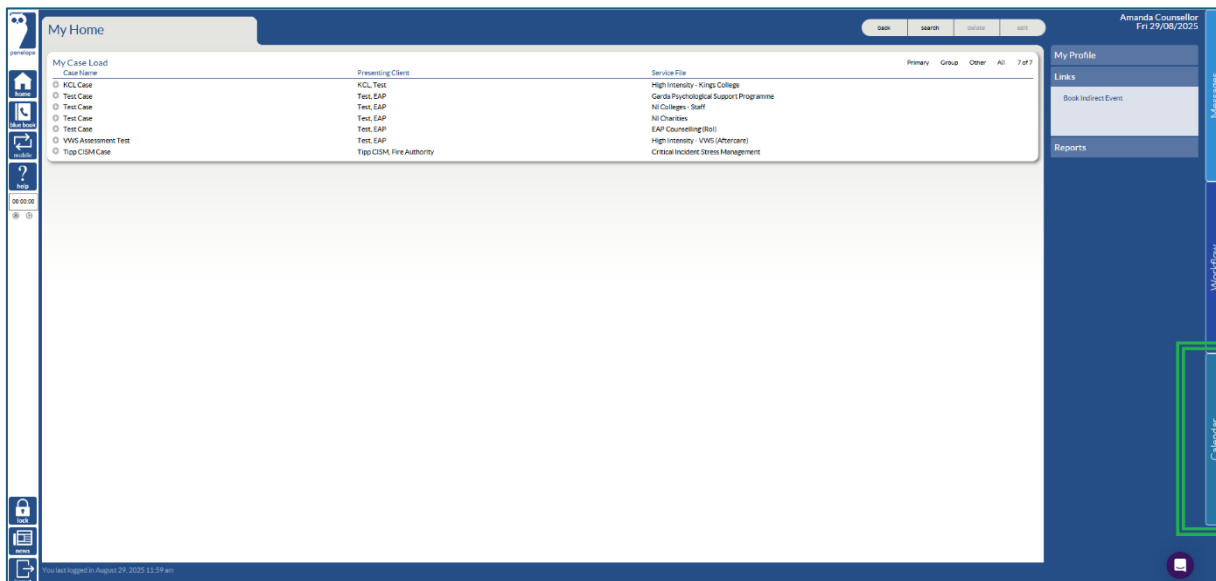
Click the **Service Event** you would like to add service unit to:



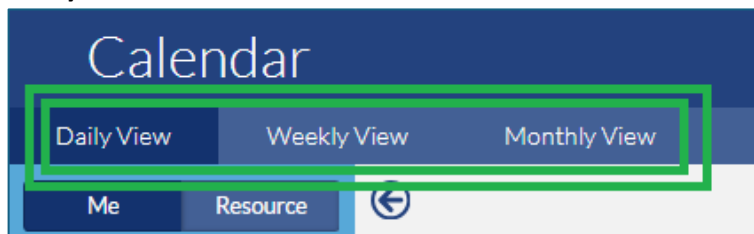
Date	Time	Event Desc	Dur(Min)	Status
Fri 29/08/2025	12:00 PM	4 Appointment	60	Booked
Fri 22/08/2025	11:30 AM	3 Appointment	60	Show
Mon 11/08/2025	1:00 PM	2 Appointment	60	Show
Mon 11/08/2025	12:00 PM	1 Appointment	60	Show

You can also navigate to the **Service Event** from **Calendar** in Collaboration Suite.

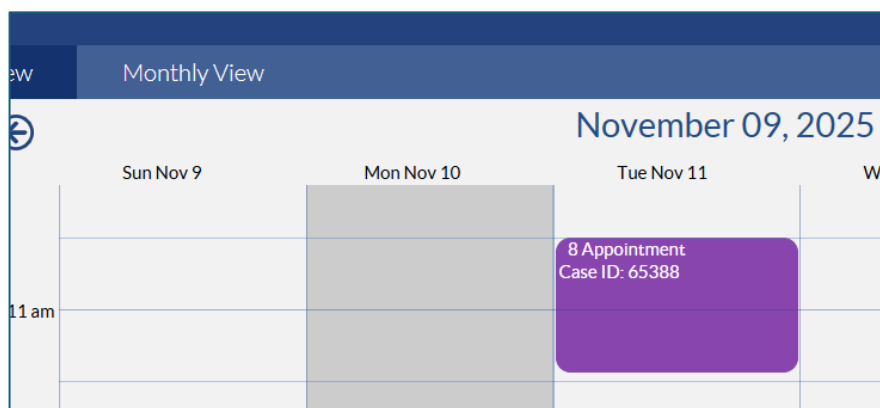
Click on the Calendar tab on right-hand side of your screen:



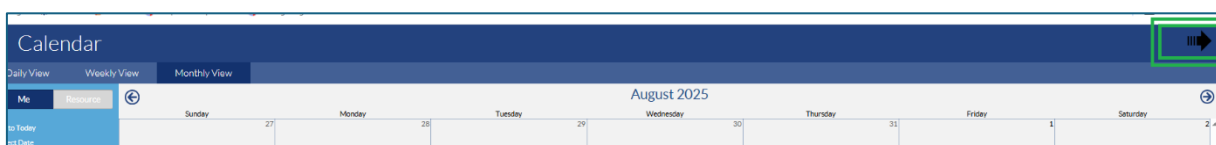
Your calendar will open over the top of your current screen. To change view, click on **Daily View**, **Weekly View** or **Monthly View**.



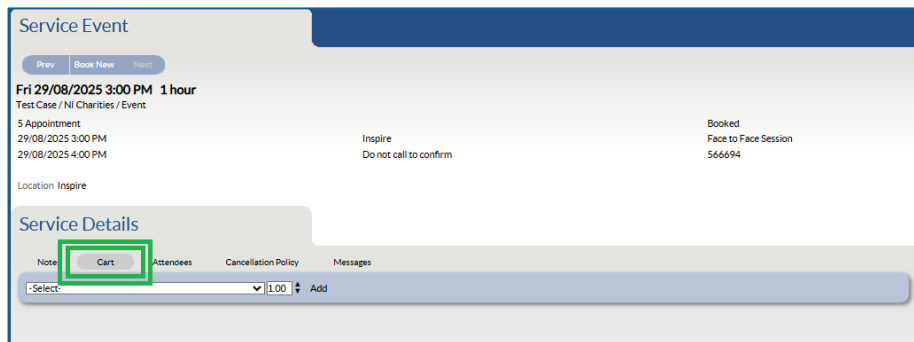
You can access a Service Event directly from your Calendar by clicking on the event name:



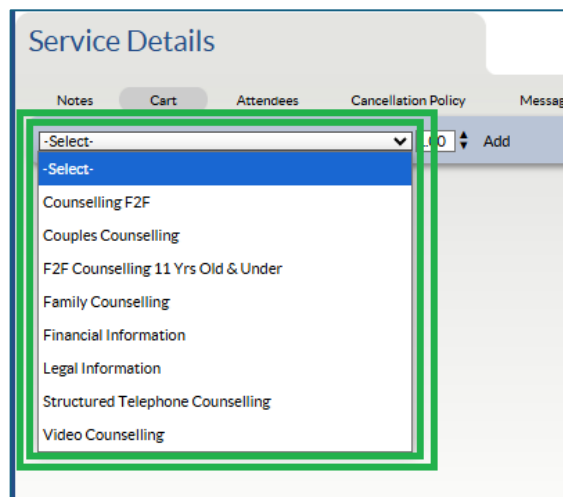
Note: To close/hide Collaboration Suite, click on the black arrow in top right-hand corner of screen.



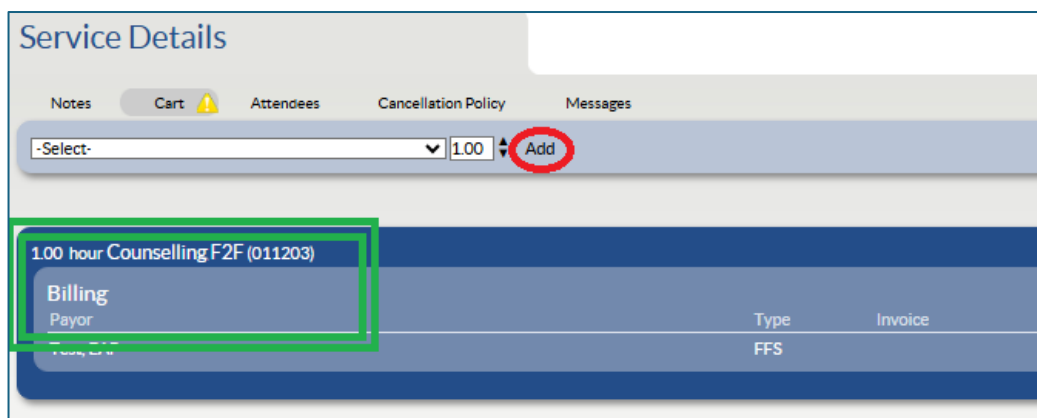
Click **Cart**:



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) 

Payor	Type	Invoice	Auth
Test, EAP	FFS		