

Mental health,
understood.



Penelope: How to book a session

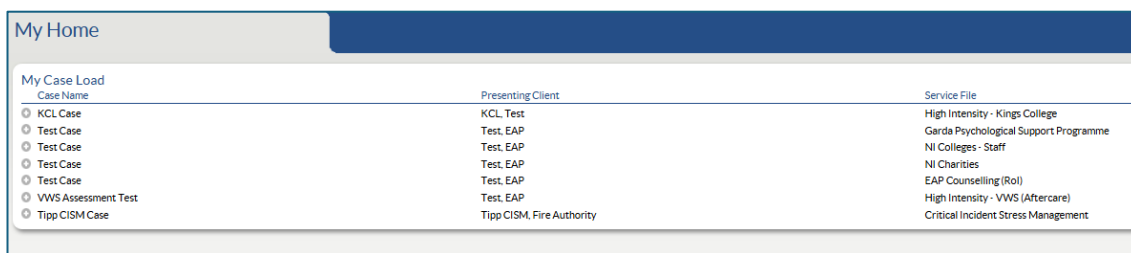
This document provides step-by-step instructions on how to book a session with your client.

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



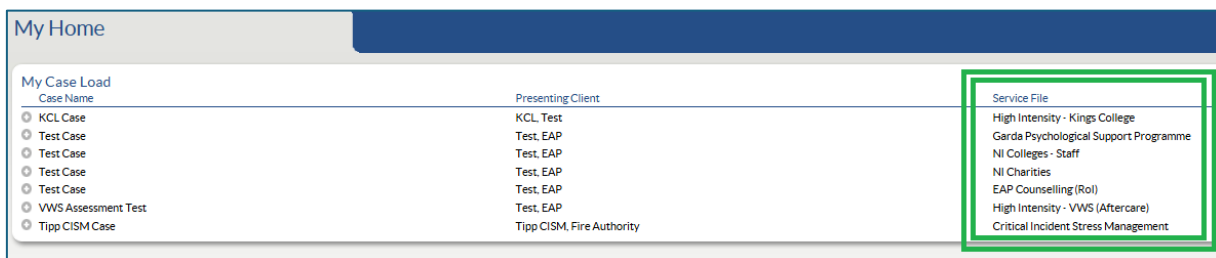
The login screen features the Penelope logo (an owl) and the text 'penelope case management'. Below this, it says 'Penelope credentials:' followed by two input fields: 'Username' and 'Password'. A 'LOGIN' button is positioned below the password field, and a 'Reset account password' link is at the bottom.

My Home screen displays your current caseload:



My Case Load	Presenting Client	Service File
Case Name		
<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
Case Name		
<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
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<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

Service File screen displays several important details:

Estimated Sessions:
Number of sessions in contract

Estimated Sessions **6 (Recommended 6)**

Client's name and phone number:

Participants
: EAP Test 07926590960
• Emotional/Personal - Anxiety

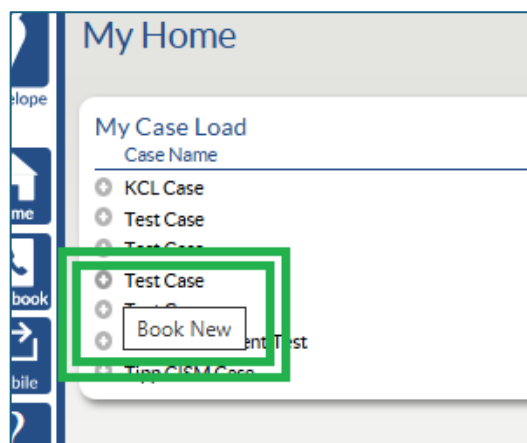
Service Events (Penelope term for sessions):
List of all past and future sessions for client

Service Events		
All	Booked	Filtered 3 of 3
Date ↑	Time	Event Desc
Fri 22/08/2025	11:30 AM	3 Appointment
Mon 11/08/2025	1:00 PM	2 Appointment
Mon 11/08/2025	12:00 PM	1 Appointment

In Service Events section, click on **Book New**:

Service Events											
All	Booked	Filtered	3 of 3							Remove Booked Events	Book New
Date ↑	Time	Event Desc	Dur(Min)	Status	Booked By	Event Type					
Fri 22/08/2025	11:30 AM	3 Appointment	60	Show	(W) Amanda Counsellor	Video Counselling					
Mon 11/08/2025	1:00 PM	2 Appointment	60	Show	(W) Amanda Counsellor	Face to Face Session					
Mon 11/08/2025	12:00 PM	1 Appointment	60	Show	(W) Amanda Counsellor	Face to Face Session					

Shortcut: To go directly to Book Event screen from My Home, click on the plus (+) icon beside the Case Name:



The Book Event screen displays your calendar. The calendar defaults to today's date. To view a different date range, enter a date in the **Start Date** field. You can type a date or click **select date** to select from the calendar. Click **View**. The schedule will start from the selected date.

View select date

Start Date

Specific Day of Week

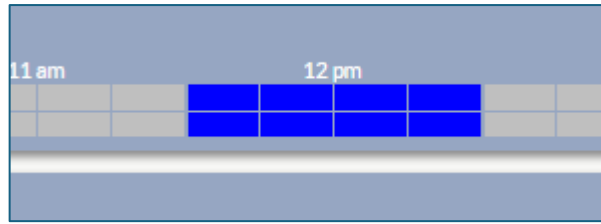
Days to View Hours: to

Suggested 6 events at 60 minutes

View

Place your cursor over the arranged session date and start time and click mouse. This will highlight the rectangles in blue.

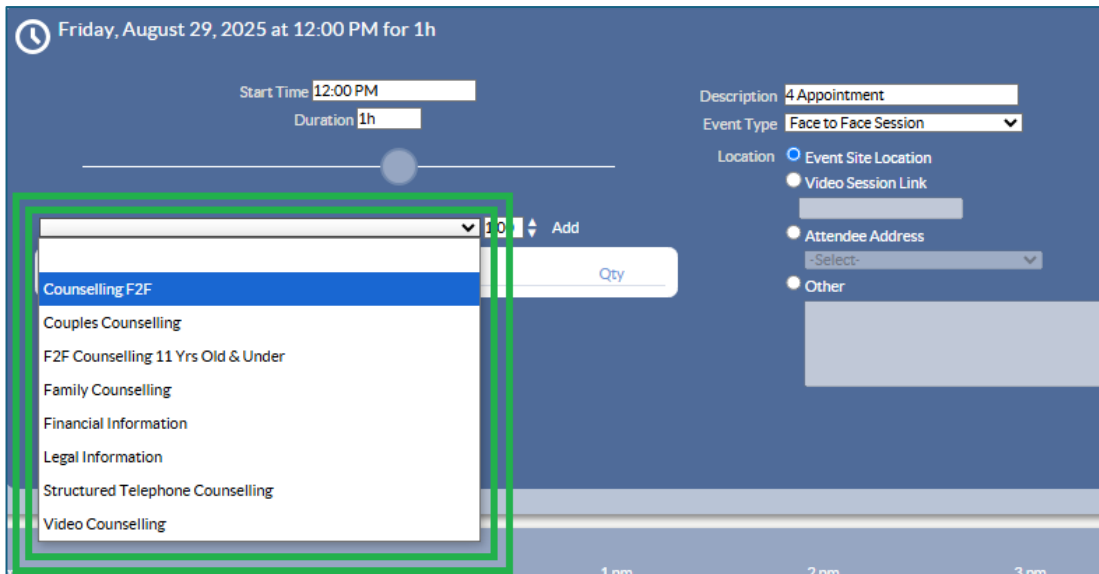
Note: Each rectangle represents 15 mins, the hour is centred in middle of the four rectangles which represent the hour.



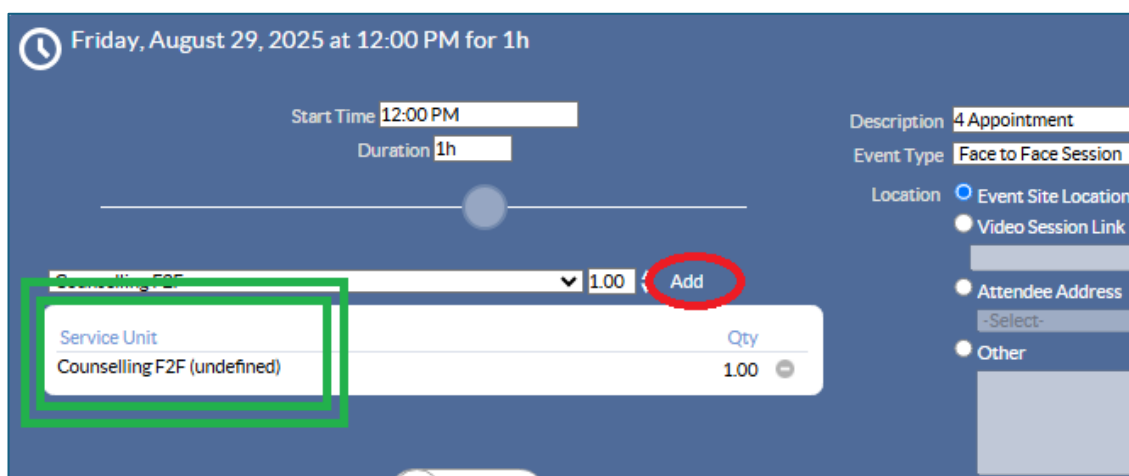
The selected session date and start time is displayed at top of screen:

Select the appropriate **Event Type** using the drop-down list:

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

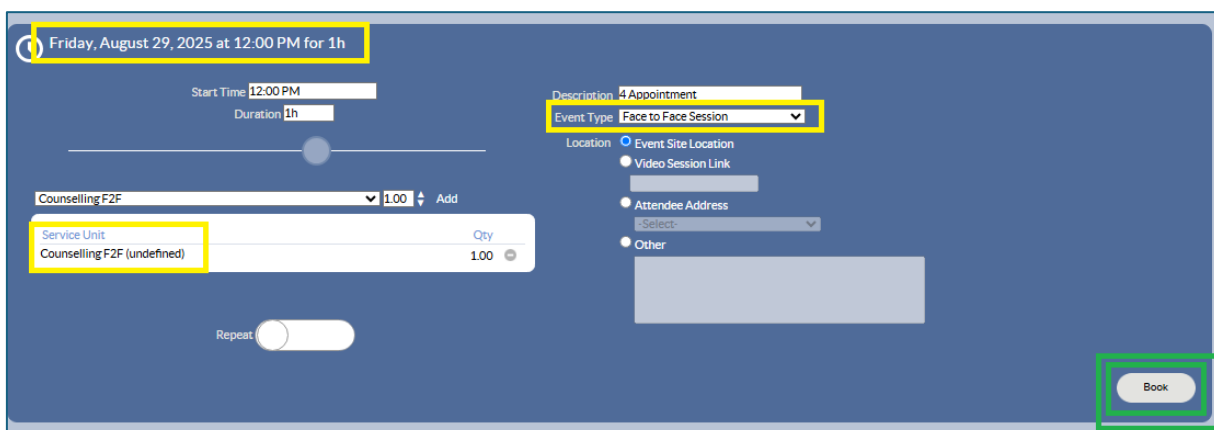


It is important to click **Add** to save and add the Service Unit into the session cart. The Service Unit will be displayed as shown below. One service unit is required for each session.

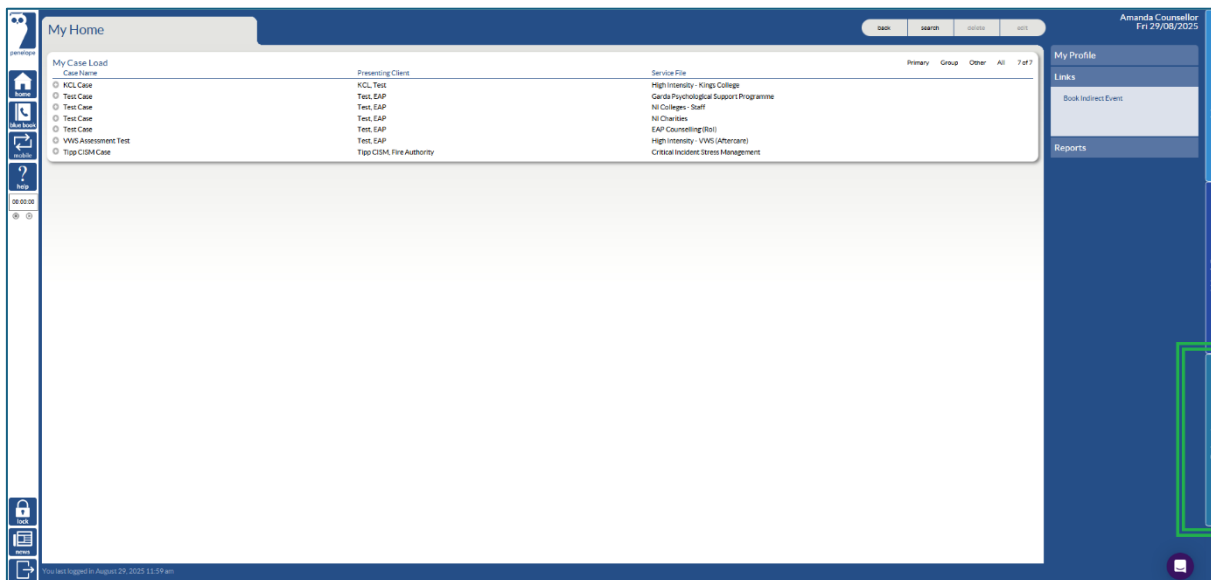


To remove an incorrect or extra service unit, click on  beside the service unit to be deleted.

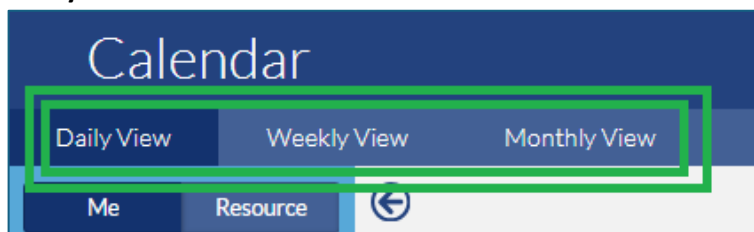
Once all information has been added and verified, click **Book** to add session into your calendar:



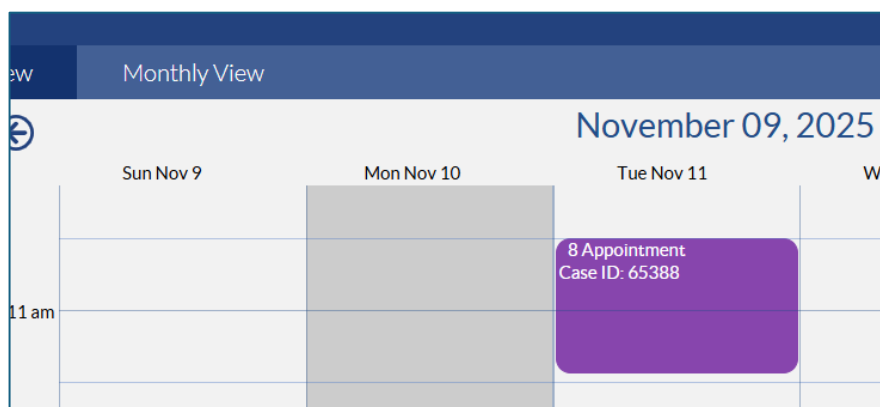
You can navigate to a booked **Service Event** from **Calendar** in Collaboration Suite. Click on the Calendar tab on right-hand side of your screen:



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.

Calendar

Daily View Weekly View Monthly View

Me Resource

August 2025

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	31	1	2

to Today
at Date

