

Mental health,  
understood.

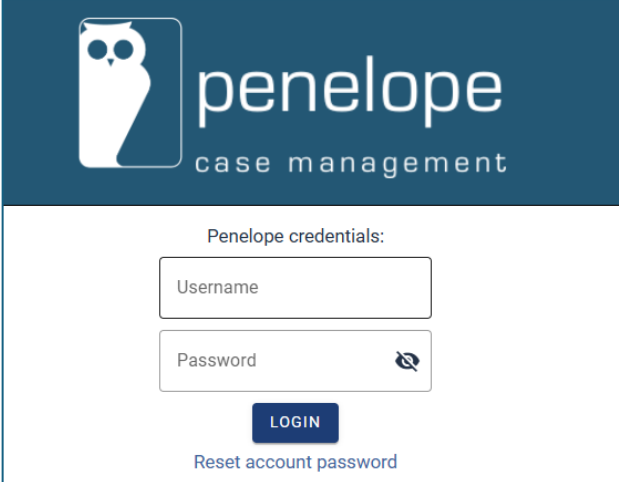


Penelope: How to send Coming to Counselling Contract

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

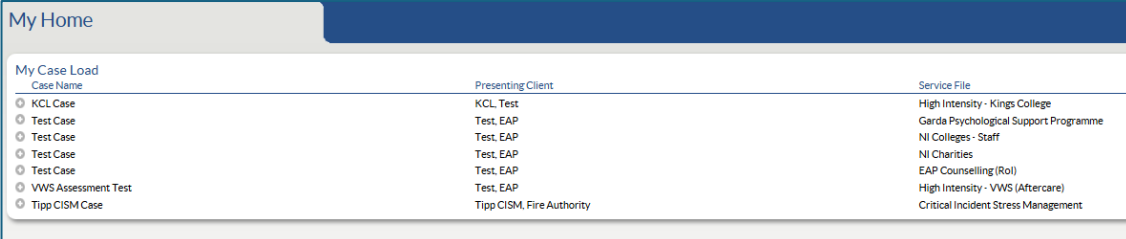
Please note that this option is only available where the client has provided consent to receive emails.

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' (with an eye icon for visibility). A blue 'LOGIN' button is centered below the fields, and a link for 'Reset account password' is at the bottom.

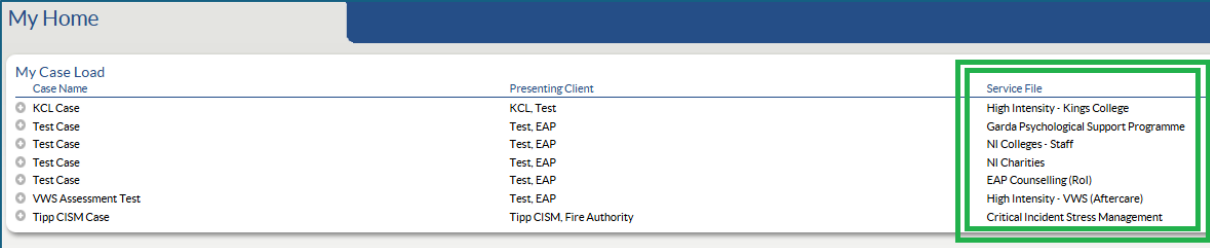
**My Home** screen displays your current caseload:



The 'My Home' screen displays a table with three columns: Case Name, Presenting Client, and Service File. The table lists several cases, including 'KCL Case', 'Test Case', 'VWS Assessment Test', and 'Tipp CISM Case', each with corresponding client and service file information.

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

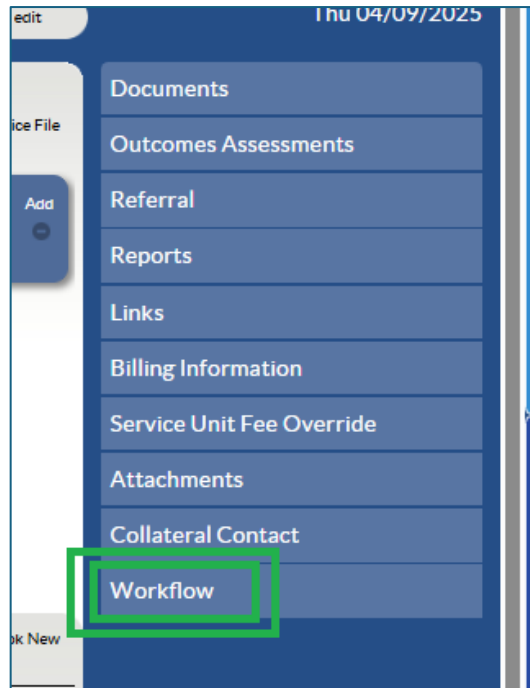
Click on the **Service File** (Penelope term for referral) to view the referral details:



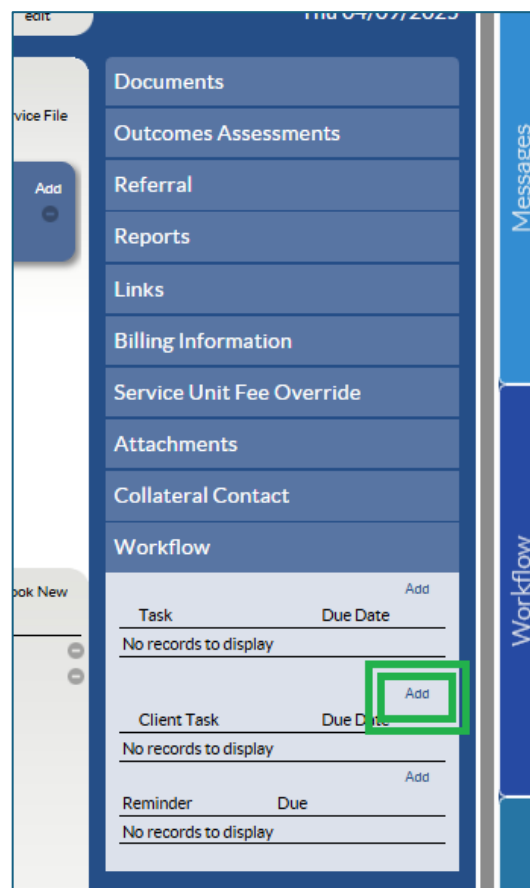
The 'My Home' screen is shown again, but with a green rectangular box highlighting the 'Service File' column. This highlights the list of service files for each case, such as 'High Intensity - Kings College' and 'Critical Incident Stress Management'.

Case Name	Presenting Client	Service File
KCL Case	KCL Test	High Intensity - Kings College
Test Case	Test, EAP	Garda Psychological Support Programme
Test Case	Test, EAP	NI Colleges - Staff
Test Case	Test, EAP	NI Charities
Test Case	Test, EAP	EAP Counselling (Rol)
VWS Assessment Test	Test, EAP	High Intensity - VWS (Aftercare)
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.

If the client's name is **not** available in drop-down list, this indicates that they have not provided consent to receive emails; therefore, the contract cannot be sent.

**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 input 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 showing ':Select-', and the name 'Rooney, Aileen'.
- Forms:** A list of forms with checkboxes. The 'General Coming to Counselling Contract' form is checked. Other forms include Core10-1 Initial, Core10-2 Progress, Core10-3 Close, GAD-7 Final, GAD-7 Initial, PCL-5 Close, PCL-5 Initial, PCL-5 Progress, PHQ-9 Close, and PHQ-9 Initial.
- Buttons:** 'cancel' and 'save' buttons at the bottom.