Penelope Overview

Introduction
Penelope is a client-centric information management system that is mobile-friendly, web-based and trusted by non-profits and social service providers worldwide. Based in Waterloo, Ontario, Canada, developer Athena Software has been providing innovative, easy-to-use social services case management software to clients in North America, Australia, New Zealand, the U.K. and elsewhere around the world since 2001.

How it Works
The primary client in Penelope will be the individual with a military affiliation, but our clients also include all family members and individuals connected to the primary client. The individual with the military affiliation does not have to present themselves for their family to access services. All family information is stored in one case file. This is necessary to capture unique families served which is a Veteran Family Program (VFP) reporting requirement.

Case Services are connected to a Case Service Class, either Military Family Services Program (MFSP) or VFP. This structure makes it easier to pull data for reporting and to restrict user access for security. The list of Case Services is fixed and can only be altered by the System Administrator at HQ.

Case Services under MFSP:
- Absences (FSR)
- Childcare
- Children 0-5
- Children 6-12
- Education
- Employment Services
- Family Information Line
- Family Liaison Officer
- Information & Referral
- Language Services
- Mental Health/Psychosocial
- Outreach Services
- Parenting
- Personal Development
- RCAF Family Sponsor Program
- Relocation and Posting
- Special Events
- Special Needs
- Teen/Youth
- Volunteer Services

Case Services under VFP:
- Veteran Family Program

Each MFRC will have a unique listing of Case Services Events/Groups because the users create these in the system under their location. Case Service Events must relate back to one of the Case Services and are either a group/workshop or a one-on-one service.

**Benefits**
Penelope is extremely powerful and intuitive. Military Family Resource Centres (MFRCs) will be able to use it to effectively capture client data, monitor communications, track program delivery and records that support VFP clientele.
The information contained within Penelope will be particularly valuable in evaluating the success of the VFP, both at the local and national level. Penelope client management software will help support the VFP by:

- Capturing client records and case files
- Standardizing data sets at all locations
- Tracking and monitoring appointments with individual clients
- Providing scheduling options on upcoming VFP sessions such as Living Life to the Full or Mental Health First Aid for the Veteran Community
- Providing clinical progress and session notes/service planning tools
- Direct client engagement tools and workflow reminders such as e-mail / SMS reminders
- Automating evaluation and performance management processes
- Delivering quality control and accountability tools to support the evaluation and reporting of the Veteran Family Programs and services
- Providing a place to store and access detailed community resource information called a ‘Blue Book’

Penelope’s ease of use and highly configurable platform make it the perfect choice to support the client management needs of the Veteran Family Program (VFP). Penelope provides highly secure data storage, extremely flexible reporting options that will allow VFP service providers working with families the ability to focus on outcomes by reducing the amount of paperwork and providing efficient data management.

As service providers work with a member or family they will be constantly assessing, monitoring, planning, advocating and linking the client with all the available VFP support services. With all of the family data in one place, there will be greater efficiency in taking the next steps with the client, or repeating steps along the way when the client needs more help.

**Security**

Security of data stored within and accessible through Penelope is of paramount importance. Authenticated and configurable user accounts will ensure that staff requiring any level of access to Penelope have a named user account that is configured on “need to know” access. Role-based user groups in Penelope and detailed security classes allow the Penelope System Administrator to create and enforce strict access controls both within and across client records. Through Penelope security settings, staff will be assigned access to only the service data that they are assigned/entitled to see.

There are various security settings which work together to protect the data in the Penelope system. These security settings are what drive the capability of each worker profile.
The two major user groups are:

- **System-Admin**: Typically assigned as a role/function, not as a day-to-day login level. There is no access to client information or case files at any level. These users have access to configuration and setup and maintain worker profiles. Users at this level can unlock user accounts, create users and reset passwords.

- **Intake-Management**: Well suited for any MFRC employee that offers MFRC programs or services and/or spends time with clients. This group is responsible for setting up case files for clients, service events and individual appointments. Users have their own caseload, can book events, services, and have access to relevant case information depending on security and report class. The groups and services that the individual user manages will affect their system access.

Security classes are highly customizable. Basic security classes have been designed by Military Family Services (MFS) as a starting point. This list is not exhaustive and will grow as the needs of users are further defined:

- **Executive Directors**: Created as a separate user group. No access to data at other sites. Limited access to individual case data.

- **Family Information Line**: Created to allow FIL staff to share required information. Has a greater degree of open access to shared information than other security classes. Has no access to information of other locations.

- **Veteran Family Program Coordinators**: Access to add clients to groups, events or services including MFSP but no access to data at other sites.

- **MFRC Program Staff**: Limited access to only relevant case files and service specific access based on user location and role.

- **Head Office Staff**: Created with no access to data at other sites and with no intake wizard access. No access to case specific information. Access to record time and costs in order to bill back Veterans Affairs Canada.
• **Data Analytics:** Access to aggregate data, however no access to case specific data. This will be used by roles related to creating reports at both the MFS and the local MFRC level. The use of this Security class will be on a case-by-case basis designated by the System Administrator.

Users are limited to viewing, altering or engaging with data at their assigned site and location only. However, it is possible to have multiple sites in a ‘site tree’. This could be utilized for locations that have multiple buildings spread across the base that may need to separate services. The addition of sites is configured through the System Administrator and will be assessed as the need arises. MFS, as the top of the ‘site tree’ has access to the aggregate data at MFRC locations however, no access to individual case files.

**Terminology**
Below you will find an alphabetical listing of some Penelope features and vocabulary along with a brief description.

**Blue Book:** A searchable directory of service providers and community contacts. You can use this tool to build a custom directory of contacts (individuals and/or organizations) for your MFRC. These contacts are called Blue Book Entries and can be referenced throughout Penelope.

**Case Service:** A category listing that all groups and services fall under. Each group and service is assigned to only one case service. This is a pre-defined list set by the System Administrator.

**Client Time:** Client time is any time spent directly with one or more clients and is either recorded in Penelope as a one-on-one service or a group/workshop.

**Collaboration Suite:** The Collaboration Suite is a communication, collaboration and organizational tool featuring Messages, Workflow, and Calendar components. The Collaboration Suite sliding drawer refers to the three sliding tabs located on the far right of any screen in Penelope. Clicking on any of the three (Messages, Workflow or Calendar) will open the corresponding layer (or drawer) on top of the screen you are currently on. When you are finished working within the layer, simply re-click the tab name to slide it back over to the right.

**Collateral Contact:** Also known as an emergency contact. A collateral contact will be set up for minors or dependants and will be the point of contact on the client’s behalf. Examples of collateral contacts would be parents, guardians or caregivers. If collateral contacts have a Blue Book entry, it would normally be marked as private because their contact information does not need to be shared outside of a particular case.

**Continuous Group:** An open group without a specified end date and clients can join and leave as required.

**Emergency Contact:** See Collateral Contact for the definition.

**Group Event:** Appointments, sessions and activities that are scheduled under a group/workshop.

**Indirect Event:** Appointments and activities that are typically administrative in nature including staff meetings, conferences, etc. and are independent of client work and service delivery. These events do not appear in any Client’s service file. Workers can schedule an Indirect Event for themselves or other workers. Penelope will be capturing VFP Outreach events, Personal Development Opportunities
for VFPC as well as non-client related MFRC staff-time spent in support of the VFP such as Administration, Finance and Management oversight.

**Intake Wizard:** A tool that enables you to efficiently enter a new client into the Penelope database while collecting contact, demographic, referral, and preliminary Case information (while automatically creating a Case).

**Military Service Identifier/ID:** The first letter of their last name and the last three digits of their service number. This is a requirement for the primary member of a case, as they must have a military affiliation. Having this number protects the member/family’s identity but still allows for the tracking of the number of families being served.

**Non-Client Time:** Non-Client time is any time not spent directly with clients (administrative task or outreach activity) and is tracked in Penelope as an indirect event.

**Non-Continuous Group:** A closed group with a set start date and end date where the same group of clients are expected to attend each scheduled event.

**Outbound Referral:** A referral made to another organization or service provider on behalf of a client.

**Presenting Issues:** The three options to choose from are Support, Intervention and Information and Referral. This field will be filled in when adding clients to groups/services or adding inbound referrals.

**Presenting Participant:** This is a parameter in Penelope when adding clients to groups/services but is displayed as Pres Participant Name. This is where the specific individuals are selected from a case to determine who is accessing that group/service.

**Primary Client/Member:** The first person entered using the Intake Wizard when creating a new case; this should be the individual with a military affiliation. All other individuals within the case will be added afterward with a description of their relationship to the primary member.

**Primary Worker:** The main staff member who is responsible for facilitating a group or providing a service.

**Service Event:** Appointments, sessions and activities that are scheduled under a service file.

**Service File:** Specific instances of a service that are tracked within an individual’s case file. Only workers added to the workers box of a particular service file will have access to it. Once a service file is created, then service events can be added to it.

**Service Wizard:** A tool that enables you to record time spent with an individual client. Also referred to as a one-on-one service in Penelope. The Service Wizard allows you to create the Service File and Service Events simultaneously.
Help
One-on-one tailored support is available while you familiarize yourself with the software. Connect with our team via Penelopesupport.soutienpenelope@forces.gc.ca for any questions or support.