Penelope Case Management Software is a leading mobile client information and practice management CMS / CIS system used successfully by a broad range of social service providers - including case management, disability support, mental and behavioral health, domestic violence programs / shelter services, outreach and education services.

Penelope is powerful yet easy-to-use web-based software that can either be installed on your own server or securely hosted by Athena Software as a service (SaaS). Penelope delivers an impressive return on investment by integrating all aspects of your organization’s scheduling / calendaring, clinical notes, service planning, service delivery tracking, billing, outcomes evaluation, reporting, referrals, wait-listing and documents management needs in one innovative and intuitive package.

Your organization can start benefiting from Penelope quickly and easily as the system can be deployed rapidly, features a tremendous degree of customizability, and is extremely well-supported by our knowledgeable and friendly training and support staff.

Athena Software is a proven solution provider trusted by governments, police services, universities and a host of organizations of international, national and state-wide scope - all around the world.

Join the thousands of Penelope users coast-to-coast across the USA, Canada, the U.K., Ireland, the Caribbean, Australia, New Zealand, Japan and Hong Kong in helping to improve client outcomes through smart mobile client information systems.
“Your wonderful staff members we’ve worked with exemplify great customer service and support as they are highly effective and efficient.

I am not a technologically minded person, so I have had a lot of questions often requiring additional explanation and they have been patient and courteous. They have also proven to be very knowledgeable.

Thank you for having such motivated and committed employees. It makes a huge difference to the customer.”

Michaell Rose, LCSW
Program Director
Hoag Hospital,
California, USA

HIGHLIGHTS

→ penelope is a WEB-BASED APPLICATION
  ‣ centralized real-time data access requiring simply a browser such as Internet Explorer or Firefox
  ‣ platform-independent
  ‣ nothing to install
  ‣ unites remote locations and mobile workers
  ‣ can be purchased as a software as a service (SaaS) or self-hosted

→ penelope is a TRUE CASE MANAGEMENT APPLICATION
  ‣ a true multimedia representation of "client linked groups" and the specific services in which they are participating, surveys completed, notes, memory joggers, documents, forms and account history all in one place
  ‣ naturally represents multiple services provided to a single client or family

→ penelope is A TOTAL SOLUTION
  ‣ it is a proven solution whose design has been informed by the wisdom, practical requirements and experience of practitioners, administrative support staff, managers, supervisors and finance officers around the world
  ‣ its deployment is guided by an expert, knowledgeable and friendly team of personnel that know your business
  ‣ it is enhanced and enriched by outstanding live client support and online learning resources

→ penelope is INTEGRATED
  ‣ brings together all aspects of an organization’s operations into a coordinated, comprehensive and coherent system designed from the ground up in order to...
  ‣ coordinate and assist in service delivery
  ‣ provide a unified framework for monitoring performance and outcomes from a variety of perspectives and operational domains (e.g. client self-rated improvements, compliance with business and accreditation requirements, program utilization, etc.)
  ‣ unite diverse services types all in one system
  ‣ reduce transaction costs and administrative burden
  ‣ provide a flexible framework to accommodate diverse processes, data tracking and reporting requirements
  ‣ allow for open access to the back-end data for custom reporting
BENEFITS

**PENELOPE IS FLEXIBLE** and accommodates a broad range of information requirements, clinical documentation and service types without additional costs / customization fees. Custom demographics, treatment plans, assessments, form letters and service-specific information and business processes are easy to configure in Penelope.

**PENELOPE IS EASY TO USE SOFTWARE.** Penelope’s clean, intuitive interface and design will result in efficient change management and rapid deployment.

**PENELOPE IS AN EFFECTIVE PRACTICE MANAGEMENT TOOL** that will assist in providing improved coordination of services, efficient allocation of agency resources and enhanced client outcomes.

**PENELOPE WILL REDUCE COSTS** associated with service delivery, administration, intake, reporting, billing and documentation.

**PENELOPE WILL HARMONIZE AND UNITE** the various strands of data and variety of business processes into a coherent client information system that will assist in agency-wide research, planning and evaluation.

**ATHENA HAS A WEALTH OF EXPERIENCE AND A PROVEN TRACK RECORD** in implementing Penelope at agencies small and large, operating single programs or a large number of programs with a diverse range of business process, data collection and user authorization requirements.

**PENELOPE IS WEB-BASED/ MOBILE** and so provides the perfect mobile platform for connecting staff wherever they may be.

**PENELOPE PUTS YOUR DATA AT YOUR DISPOSAL** - Penelope encourages and empowers agencies to answer even the most complex research questions via a variety of reporting and data extraction tools.

**PENELOPE IS FUTURE PROOF** - Penelope has been designed with maximum flexibility in mind so that, as your needs change, you can adapt Penelope to meet those emerging needs. Adaptation can commonly be achieved within the OOTB functionality. However, we are pleased to consider customization services to solve specific business challenges.
FEATURES

SMART CASE FILE STRUCTURE that accommodates individual or family case files receiving one or more services from one to many providers.

NATURALLY TRACK SERVICE PROVISION involving individuals, couples, families, groups, educational and outreach activities, anonymous contacts, and collateral contacts.

CENTRALIZED REAL TIME SCHEDULING with MS-Exchange 2010 push and automatic SMS / email alerts/ reminders to clients and staff.

build CUSTOM DEMOGRAPHICS and user-configurable client profile.

capture CONTACTS, APPOINTMENTS AND CORRESPONDENCE with clients, family members, colleagues and third party professionals and collateral contacts.

streamline your CUSTOM INTAKE / REGISTRATION PROCESS AND EFFICIENT CLIENT ASSIGNMENT PROCESSES

create CUSTOM SMART FORMS for intake forms, treatment plans, OUTCOMES ASSESSMENTS, shift notes and other forms, surveys and letters.

stay connected and informed with ALERTS, NOTIFICATIONS (EMAIL / SMS) WORKFLOW, AND COLLABORATION tools.

effective manage your WAIT-LISTS AND REFERRALS.

CUSTOM WORKER PROFILES with scheduling availability, clinical, security and HR information.

DIGITAL SIGNATURE CAPTURE

complete optional ACCOUNTS RECEIVABLES component with flexible self-pay and third party billing, including authorization tracking and insurance/ EAP billing (with integrated 837 P EDI claim and CMS-1500 generation) - including integrated CREDIT CARD PROCESSING.

FSP/ FAHCSIA WEB SERVICES INTERFACE for Australian clients.

PRIMHD COMPLIANCE for New Zealand clients.
OUTCOMES

Penelope makes it easy for your organization to implement a broad range of custom outcomes measurement and assessment tools to track and report on client scores, change over time, satisfaction and more. You can build multi-stage instruments, incorporate ‘smart’ questions, add response-based feedback, flags and calculate scores in a wide variety of ways.

Penelope will automatically graph out the client’s scores or change over time so that the practitioners involved can easily monitor your custom metrics. In addition, powerful built-in reporting and statistical analysis tools help you drill down into your aggregate and subset data to provide valuable comparative and longitudinal business intelligence.

Beyond providing a powerful framework for tracking goal attainment, multi-domain scores, client satisfaction scores, rates of improvements and qualitative and categorical data, Penelope’s outcomes tracking module provides advanced statistical tools for making sense of your data.

PENELOPE OUTCOMES TRACKING AND REPORTING HIGHLIGHTS INCLUDE:

- Agency-wide goal tracking – with drill down into sub-sets/ populations
- Cohort comparisons over time
- T scores, standard deviation, means, medians, variance, min/max and Diff values
- Conditional question / domain options (i.e. questions will only appear based on context- specific relevance)
- Ability to “loop through” question sets to add multiple instances of it (e.g. medication-related questions, goal-related question sets or addictions question sets)
- Ability to add weighted scores and complete scores based on custom formula options
- Ability to create “data threshold” alerts
- Ability to create custom classifications of domain scores with accompanying narrative text
- Ability to flag specific questions as mandatory
- Non-response option – also factored into scoring
- Ability to compare scores over time – from initial stage through to closure in summary, detail or graph modes
- More data input options (e.g. “other” value in lookup selections will allow text input)
- Layout style sheet options
- Ability to include/ display previous answers to a given question set (e.g. to display initial
- Treatment goals or planned interventions on subsequent, update or progress documents)
A TRUSTED PARTNER

Penelope is the trusted solution for governments, police services, universities and international, national and state-wide health and social service organizations around the world - in all Australian states and territories, across the USA and Canada, and across the United Kingdom, Ireland, New Zealand, Japan, South Africa, South Korea, Greece and Bermuda.

We at Athena Software take great pride in our track record of client success spanning 13 DYNAMIC YEARS, 15 COUNTRIES ON 5 CONTINENTS and encompassing over 17,000+ USERS. We are a privately owned company based in Canada’s “Technology Triangle” in Waterloo, Ontario.

From small non-profits to large multi-site organizations to governments, our case management and counseling software’s flexible design and powerful configurability has enabled successful deployment at hundreds of these types of organizations worldwide:

- Case Management Services
- University Counseling Services
- Disability Support providers
- Mental Health Service Providers
- Behavioral Health Service Organizations
- Counseling Agencies / Individual-Group Therapy
- Domestic Violence programs / Shelter services
- Child and Youth Service Organizations
- Young Parent Resource Centers
- Substance Abuse / Addictions Treatment Facilities
- EAP / EFAP Employee Assistance Providers
- Homelessness Outreach Support Services
- Immigration Settlement Services
- Employment Training and Support Programs
- Occupational Health and Safety Nursing Organizations
- Brain Injury Support Agencies
- Information and Referral Services
- Relationship Counselling and Mediation
- Sexual Assault and Treatment Agencies
- GLBTG and AIDS Support Organizations
- Foster Care Providers
- Child Protection Services
- Housing Support Services
- Multi-site organizations with 1,500+ staff

“Athena Software is comprised of compassionate people, who not only understand technology, but understand the industry as well.

Athena software also has an enormous customer service focus which once again, can be rare amongst software suppliers. Support is a key to the experience and Athena takes great pride in making this experience a great one.”

Sandra Vallance, Relationships Australia Adelaide, South Australia

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“Everyone at Athena goes above and beyond in providing customer service and technical support. It doesn’t matter who I talk to at Athena, I always receive the highest quality customer service.

I can’t say it enough—Athena’s customer service is superb! I have enjoyed getting to know each of you because you are an exemplary group of people. It has been my pleasure to work with the best of the best for five years.”

Dana Williamson
Metropolitan Organization to Counter Sexual Assault
Kansas City, Missouri

While all our Software as a Service (SaaS) clients receive the equivalent of Gold Support, clients with their own server licensing may optionally select one of 3 annual support packages:

**SOFTWARE AS A SERVICE**
- 4 hours of training
- Unlimited technical support
- Automatic upgrades

**GOLD SUPPORT**
- 4 hours of training
- Unlimited technical support
- Access to upgrades

**SILVER SUPPORT**
- 15 units of technical support
- Access to upgrades

**BRONZE SUPPORT**
- Access to upgrades

Our friendly and knowledgeable staff deliver truly world class support through a variety of means:

--- **ONLINE HELP SITE AVAILABLE 24/7** - searchable learning resource centre includes categorized knowledgebase articles, downloads / tutorials, news and a ticketing system

--- **IN APPLICATION, CONTEXTUAL HELP LINKS** - direct links to relevant knowledgebase resources online

--- **TELEPHONE AND EMAIL SUPPORT** - available Monday to Friday 9am-5pm Eastern Standard Time (GMT-5)

--- for Pacific Rim clients - Australian-based telephone support - available Monday to Friday 8am-6pm Australian hours (AEST)

--- **WEBINAR SERIES** - available regularly (including during Australian business hours) - covers one topic each session such as document creation, invoicing, custom report creation, intake processes etc.

--- **MOODLE** - online Penelope community and course system

--- **USER COMMUNITIES** - online user driven solutions and discussions
all you need to access the system is a web browser (like Internet Explorer or Firefox)
there is nothing else to install for users no data cache is left on any workstation
no touch screen devices are required (but can be used if desired)
excellent reliability / uptime and outstanding performance
system can be configured to encrypt all data in transit using SSL
backups can be done online / while system is in use
ask for a spec sheet on our top tier data centers

✓ VIRTUALLY ANY OPERATING SYSTEM - eg. Windows 2008+ server, CentOS, RedHat EL4, Mac OS X etc
✓ VIRTUALLY ANY BROWSER/ DEVICE - eg. Firefox, Internet Explorer 9, Chrome, Safari
✓ ALL IN ONE BUNDLE - components required to run penelope are provided by athena software at no additional cost
✓ OUTLOOK / EXCHANGE SYNC - penelope features a one-way push sync to Exchange version 2010 for calendar events created in penelope (exchange license not provided or covered in cost)
✓ WORKS WITH TERMINAL SERVICES, VPNS AND CITRIX
✓ SMS/ EMAIL ALERTS / NOTIFICATIONS - with selected bulk SMS providers (third party volume fees apply)
✓ CREDIT CARD INTEGRATION - with selected payment processing providers
LET’S GET STARTED

We’re here to help you get up and running as smoothly and efficiently as possible. Here are the steps involved in this process (of course, for larger deployments, custom deployment packages can be designed to suit your needs). * fees may apply

1) REVIEW THIS DOCUMENT
   ✓ in progress

2) FINALIZE THE AGREEMENT
   ▪ license agreement
   ▪ professional services to be purchased (if any)
   ▪ payment

3) APPLICATION PROVISION

   OPTION 1: PENEOPE ON YOUR SERVER
   ▪ you may choose to install the software yourself based on our instructions or if you prefer, you can provide remote access to our technical team and we’ll be pleased to install the software

   OPTION 2: PENEOPE AS A SERVICE (SaaS)
   ▪ we install your version of the database (blank) on one of our secure servers and provide you with a website address and login details
   ▪ this typically takes place within one business day of receiving payment and a signed agreement

4) INITIAL DEPLOYMENT DISCUSSIONS
   ▪ plan out timeline and responsible parties
   ▪ identify detailed functional requirements and business processes
   ▪ will legacy data need to be migrated into penelope? if so, plan and map out this process

5) SYSTEM CONFIGURATION / TRAINING
   ▪ the first training session(s) will cover how to configure penelope to meet your requirements - including such items as document and service creation, setup of workers and their security rights etc.
   ▪ your staff will now have the knowledge to be able to complete the system configuration

6) TRAIN THE TRAINER TRAINING
   ▪ we’ll train your staff on the business processes / workflows that were identified in the initial deployment discussions so that they are knowledgeable, confident and in a position to provide end-user training to the rest of your staff (which would be your next step!)

7) GO LIVE! AND ONGOING SUPPORT
   ▪ we’ll follow up with you and support you through this ‘go live’ process to ensure you have a successful implementation

"We deliver better service with less effort and spend more time with clients and less time on paper work.

Athena case management software was easy to implement and my clinical workers and finance team are thrilled with the results.

Every social service agency in the USA needs to understand how to do more with less, especially now and this is one way we can do our part to help those in need."

John Adams
Community Human Services Monterey, California, USA