Our new collaboration suite provides a number of powerful new workflow, communication, and collaboration tools.
our new collaboration suite provides a number of powerful new workflow, communication and collaboration tools

- System triggered alerts appear as popup notifications in real time, then go into your inbox.
- If you're not logged in, your alerts will go to your email/phone via SMS.
- Alert types and parameters are set by the system administrator.
- See a partial list of alert types later in this document (e.g., Safety Flag being checked for a given client can alert certain staff members automatically, service files without any appointments in a given time period can send an alert to the workers involved, documents completed can trigger an alert to a supervisor.)
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‣ you’ll receive notifications of meetings / appointments into which you’ve been scheduled (or any changes to those meetings that you did not initiate)
‣ these event messages will appear as popup notifications in real time, then go into your inbox
‣ if you’re not logged in, your alerts will go to your email / phone via SMS
‣ these event reminders will also be sent to clients via SMS or email if they consent and if you have this configured
‣ clients will be able to confirm the appt with a single click but will not be able to respond in more detail
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conversations

- conversations are communication threads that occur amongst staff but that are not related to any specific entity in Penelope (that is, not related to clients, services, events etc).
- conversations have followers who receive notifications when other comments are added to the conversation
- these conversation update messages will appear as popup notifications in real time, then go into your inbox
- if you’re not logged in, your alerts will go to your email / phone via SMS
- conversations will be useful for residential shift logging, project planning, inter-agency newsgroups and many other wide ranging purposes
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¬ tasks are a building block of workflows and are essentially “to-do’s” with assigned staff (or unassigned, to be picked up from an open work queue), followers and due dates
¬ tasks can be associated with individuals, clients, groups, documents, cases, service files, wait list entries, referrals and many other elements of Penelope
¬ these task update messages will appear as popup notifications in real time, then go into your inbox
¬ if you’re not logged in, your alerts will go to your email / phone via SMS
¬ tasks will be useful for many purposes and form the building blocks of workflow- tasks can be Approvals, Reviews, Documents / Assessments / Letters, Checklists, Projects or just simple unrelated “to-do’s” for yourself or other staff
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- **Alerts**
- **Reminders**
- **Events**
- **Conversations**
- **Tasks**
- **Discussions**
- **Workflow**
- **Arrivals**

- When the system administrator creates system triggered alerts, they may be designated either as alerts (which a worker must act upon) or, for less critical, FYI type of messages, as notifications.
- Notifications flash as an FYI pop up notification then fade away after a few moments (they will appear in your notifications section of your inbox).
- Notifications are an FYI that does not require action on the part of the recipient (notifications can also be created for a distribution list of individuals via the worker category function).
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- **Discussions**
  - Discussions are communication threads that occur amongst staff and that are related to a specific entity in Penelope (that is, a client, service file, group, case, invoice, document, assessment, event, invoices, funders etc).
  - Discussions have followers who receive notifications when other comments are added to the discussion.
  - These discussion update messages will appear as popup notifications in real time, then go into your inbox.
  - If you're not logged in, your alerts will go to your email / phone via SMS.
  - Discussions will be useful for all manner of threaded notes/observations and collaborative communications such as discussing the assignment of a client to a particular counsellor, supervision, case reviews, notes on invoicing or funding arrangements, follow-up work related to goal planning, assessments or referrals etc.
  - Discussions may be classed as administrative in nature (internal) or clinical (where the discussion becomes part of the case, clinical or service file record).
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- arrivals are a way for reception staff to let workers know that their client(s) have arrived for their scheduled appointments
- at the agency appointments page, the receptionist can click a “notify arrival” link that automatically sends a pop-up notification to the staff involved in the meeting
- the popup notification allows the staff member to “acknowledge” the arrival (which then triggers a reply popup notification for the receptionist to then let the client know they can go in and see the therapist)
our new collaboration suite provides a number of powerful new workflow, communication and collaboration tools

- workflows can be created on the fly as needed or can be automatically created via system configuration options
- workflows can be associated with all of the main entities in Penelope including individuals, cases, documents, service files, groups, events etc.
- workflows can incorporate other collaboration suite elements such as alerts, tasks (which in turn includes general tasks, approvals, reviews, checklists and projects)
- workflow elements appear in a detailed workflow management tab on the collaboration layer and will be explored in more detail later in this document
- an example of an automatic workflow configured by system administrators might be that upon creation of a new service file in a given service (e.g. Mental Health Treatment), an MH program manager is automatically notified via a notification, a specific Assessment document must be completed with 5 days of the service start date, that upon completion of this document, a supervisor must review and approve it, that a treatment plan must be created within 14 days of the service start date and that service plan updates must be performed every 30 days
Our new collaboration suite provides a number of powerful new workflow, communication and collaboration tools.

- Reminders are simply ad-hoc reminders that you may set for yourself or others as needed.
- Reminders can be associated with most of the main entities in Penelope such as individuals, cases, service files, documents - even other collaboration elements such as tasks and discussions.
- These reminders will appear as popup notifications in real time, then go into your inbox.
- If you’re not logged in, your reminders will go to your email/phone via SMS.
Your collaboration layer is always only a single click away (wherever you are in Penelope). It slides open like a "drawer" or layer over top of your current page giving you a new context sensitive workspace.
the collaboration layer

- let's take a closer look at each of elements in the collaboration layer

**MESSAGES**
- the messages component is your “inbox” containing all of your messages organized by type
- you can create your own custom folders or tags and assign messages to them
- each message is directly linked to the underlying entity (so you can click directly from the message to the item)

**WORKFLOW**
- the workflow page features a nice summary of your tasks, the unassigned task queue and an integrated version of your calendar that also includes tasks
- the advanced tab allows you to view/filter workflow for yourself or the staff that report to you

**CALENDAR**
- the calendar page is your daily/weekly and monthly schedule in a variety of “views”
• your messages are sorted by category at left
• new messages are shaded blue and the number of these unread messages appear as a green bubble at left
• you can create new folders and assign messages to one or more folders
• you can create new conversations by clicking the pencil at the top
• you can create new reminders by clicking the clock icon at the top
• you may need to click the rounded arrow to refresh your page at times
• messages that relate to an underlying Penelope entity (eg. a case, individual, service file etc.) contain links to those entities in the header of the message --clicking them will close the collaboration layer and open the underlying entity
• you can archive messages by clicking the filing cabinet icon at the top right
• you can reply to messages with the black downward arrow icon at the top right
• you can close the window by clicking the left layer tab (that says “messages / workflow / calendar” ) or by clicking the top right arrow
Workflow items appear in your integrated task/calendar at left.

- Clicking on the items closes the collaboration layer and opens the underlying item.
- Current tasks appear at top right - these are tasks that have been assigned to you and that are due (or overdue!).
- Tasks that are merely approval or review can be "closed" by clicking "close".
- The middle right pane lists unassigned tasks (that are not assigned to anybody) - you can pick these up for yourself by clicking "pickup" - they will then appear in your current task list.
- Upcoming tasks and reminders (that is, with a due date in the future) appear in the bottom right pane.
- You can create new reminders by clicking the clock icon at the top.
- You may need to click the rounded arrow to refresh your page at times.
- You can close the window by clicking the left layer tab (that says "messages / workflow / calendar") or by clicking the top right arrow.
 Workflow - advanced

- Clicking the “advanced” tab at the top left will display your reminders/tasks in a sortable and filterable list.
- Toggle between reminders and tasks with the radio button at the top left.
- Filter to display reminders/tasks assigned to you, that you are following or that have been assigned to people that report to you with the “assigned” radio button at the top left - you may also filter by task type with the drop down list.
- You may also filter by the status of the task and the due date at top right - if you want to see which tasks are overdue, for example, you can select due within -90 days and it will show you all tasks overdue 90 days or less.
- There is also a sort function at the top right.
you can view your daily calendar with this layer

you can also switch to a weekly or monthly view as needed

there are a number of filters you can use to refine your view

you may need to click the rounded arrow to refresh your page at times

you can close the window by clicking the left layer tab (that says “messages / workflow / calendar”) or by clicking the top right arrow
let’s look at an example of a conversation in action

CONVERSATIONS

let’s walk through a scenario where you and a couple of colleagues want to discuss the roll out of a new group your agency is going to offer

from your message layer, you will click the pencil icon at the top left

add the colleagues you’d like to include in the conversation

add your subject line, notes and click ‘send’ - they will be automatically notified (within 2 minutes) of this new message
let’s look at an example of a conversation in action

• the followers of the conversation are notified and add their comments to the thread - and each time, all the followers are notified and their message inbox is updated appropriately in real time
Let’s look at an example of a discussion in action

DISCUSSIONS

- Let’s walk through a scenario where you would like to start a clinical discussion about a coordination of services for a given case - both within your organization and with outside providers.
- A discussion is a great way for multiple staff to collaborate on this type of information, keep up to date on new comments, actions, results, outcomes, communications, incidents etc.
Let's look at an example of a discussion in action.

Once saved, the discussion's followers are notified automatically.

They can reply inline (in the message layer itself by clicking the downward black arrow at top right) or they can access the underlying discussion in its context by clicking the message's subject line (the title of the message in big bold letters at the top of the message).

Each contribution to the discussion appears in sequential order.
› let’s look at an example of some example workflows in action

![Workflow](image)

- let’s walk through a scenario where we’ll build an ad hoc workflow checklist (that itself is composed of workflow elements)
- in this scenario, we’ll assume that given a certain type of case, certain tasks, documents and notifications need to occur - we’ll pretend it’s a case where there is a significant safety concern
- this may be a type of workflow where it makes more sense to use the workflow templates but those will be covered in a separate document
- in this scenario, we’ll access the case and then click “add” to add a workflow
- we’ll select a checklist type of workflow to add a few items that need to be done - we’ll assign staff to them and set due dates as well
- once you create the workflow, those followers will be updated whenever updates to the workflow are made
- first we create the checklist workflow, then we add the items that make up the checklist
Let’s look at an example of some example workflows in action.

- in this scenario we’ll add a document to be completed and assign this task to a staff member.
- these documents can automatically have a supervisor review them as part of their workflow template, so we’ll add another staff member to review it.
- we’ll also add a couple of other tasks as well - including completing another document in the future.
- the staff assigned to those items will automatically receive notifications and tasks on their “to-do” list.
Let’s look at an example of some example workflows in action.

- The staff member will be notified and within the message itself, they will be able to access the task and complete the document.
- Once they have completed the document, it is done and off their list - the followers of the original checklist will be notified and the reviewer can review the document.
Let’s look at an example of some example workflows in action.

The staff member will be notified and within the message itself, they will be able to access the task and complete the document. Once they have completed the document, it is done and off their list - the followers of the original checklist will be notified and the reviewer can review the document. As tasks are completed, they are stroked off the workflow checklist automatically.
auto-alerts

**individual-related**
- change in Safety Concern flag (on/off)
- change in selected user defined value (any change or change to a specific value)
- X days before a client’s birth day

**case-related**
- case is created
- case’s status is changed
- change in case level user defined value (any change or change to a specific value)

**group-related**
- client is enrolled into a group
- service file is set to close after X days
- group capacity is reached
- new group session is added
- session limit is reached or exceeded

**referral-related**
- new inbound referral for specific service
- new outbound referral for specific service
- outbound referral remains open for X days

**user-related**
- user account is locked / unlocked
- concurrent user limit is being approached

**event-related**
- event status is changed to a specific status
- when an event note is locked
- when a note is not locked after X days
- when a client no shows for X appts in a row
- when a client involves fee for service billing
- when a client cancels X times in a row

**document-related**
- specific document/ letter/ assessment is completed
- document signature is missing for X days for specific document
- specific document is not locked after X days
- specific document is locked
- question within a document is flagged
- a score meets a specific classification level

**service file-related**
- service file is created
- service file has had no activity in X days
- service file has been open for X days
- client in service file is X days from turning a given age
- worker has been reassigned to/ from service file
- other worker has been added to the service file
- changes in service file members
  - if a minor has been added to a service file
  - if an adult has been added to a service file
  - if a service file member has a certain presenting issue
  - change in service file level user defined value (any change or to a specific value)
  - if a service file member has more than one presenting issue

**waitlist-related**
- someone is added to the pre-enrolment queue
- someone is added to the queue for a specific worker
- new high priority queue entry
- someone has been on the queue for X days
- pre-enrolment queue is cancelled
- when someone is added to the queue for a specific reason

**billing-related**
- change in Financial Concerns flag (on/off)
- account aging - when invoice / debit is X days overdue
- unapplied receipt/ credit is X days unapplied
- coverage limit is being approached (% of coverage limit used - whether it is units / $ or date range)
- new client policy created/ added
- new coverage added for client

**performance-related**
- specified CPU / memory threshold is reached
for each of the alert options described in the last page, you can optionally trigger one of the following “system events”

- an alert
- a notification
- a workflow

if you select a workflow to be created, you can select one of the following workflow types:

- completion of document(s)/ letter(s) and assessment(s)
- approvals
- reviews
- checklists
- tasks
- project
if you select a workflow checklist to be created, you can for example create the following type of auto-workflow template (this is just an example, there are a million possibilities as you can see!)

- trigger = service file is created for service X
- trigger outcome = workflow checklist

workflow checklist = complete document A (which then triggers a review by worker D), add them to the waitlist for service B (which then triggers another set of workflows), add reminder for worker B to followup after 14 days

- subsequent triggers = document A is not signed for 7 days, worker A is notified, document triggers Y flag, worker K is notified and workflow is triggered to complete another document Q (upon the completion of which, worker F is notified) etc
penelope

COLLABORATION SUITE

v4 OVERVIEW

ATHENA SOFTWARE

February 2014

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