penelope
case management software

WORKFLOW AUTOMATION, COLLABORATION & CLIENT ENGAGEMENT INFORMATION PACKAGE

athena software
Penelope is a powerful, integrated case management solution that can help transform the way your organization engages with clients, works collaboratively, demonstrates outcomes, and delivers quality, best practice services.

Trusted by governments, hospitals, school boards, police services, universities, and hundreds of not-for-profit social service agencies around the world, Penelope is a configurable cloud-based platform that brings together your clinical services, administrative operations, billing, and reporting.

Our innovative and intuitive software is just one key to the success of your organization and your clients.

Penelope is delivered as part of a suite of comprehensive end-to-end services designed to provide maximum benefit to your organization during all stages of your transformational journey.
Working together collaboratively is not only efficient, it will lead to better outcomes and better service for your clients.

Penelope provides a suite of collaboration tools that empower your staff with real-time information on their clients, tasks, and other responsibilities. Even without logging in, Penelope can send notifications, alerts, and other communications to staff smartphones via SMS or e-mail so that staff are always in the loop.

As soon as staff login, Penelope presents pop-up messaging and alerts, and features a Messages inbox that brings together all aspects of their communications, workflow and client work into one convenient dashboard and integrated workspace.

Like a powerful, secure and multifaceted ‘social work network,’ Penelope allows staff to collaborate on client admissions, assignment, case planning, care reviews, referrals, group services, shift notes, critical incidents, and any other direct or indirect aspect of service. Staff can follow specific message threads or discussions, and contribute to them from their inbox or from within the underlying service component (e.g. the case file) for fast access and even faster sharing!

**Better Outcomes for a Lower Cost.**
## Benefits of Improved Collaboration

### Improved Client Outcomes
- Improved service co-ordination is a proven contributor to improved client outcomes in a variety of domains as well as contributing to successful outcomes for internal and external referrals.
- Clients of collaborative service settings also report better self-care, knowledge, and skills.

### Better Client Satisfaction
- Clients receiving care from a collaborative service context report more satisfaction and a more positive experience with their services.
- Collaboration helps to reduce barriers to service.

### Better Risk Management
- Organizations with greater inter-professional collaboration practices are better positioned to manage risk through better assessment processes that provide more informed decision-making and quality assurance.

### Lower Costs
- Organizations with greater inter-professional collaboration report reduced wait times, more efficient resource usage, streamlined access to services, reduced administration costs, better care coordination, and reduced dropout and no-show rates.

### Better Employee Satisfaction
- Practitioners working in an inter-professional collaborative manner are more satisfied with their employment and have a more positive workplace experience.
- Practitioners who work in a collaborative environment report developing enhanced knowledge and skills.
Your agency can achieve new levels of efficiency, service impact and quality assurance by extending Penelope's collaboration tools with our powerful workflow automation framework.

Build complex business rules with specific conditions related to the attributes of a service or client (you can even configure workflows to start based on an answer in a Penelope smart form).

The rules can be configured to fire at specific time-based intervals such as 24 hours prior to the first appointment, 30 days after service commencement, 45 days after an invoice has been created and is still unpaid etc.

In addition to time-based triggers, event-based triggers will fire based on system events, e.g. a new client is added to a case load, a signature is required for a document, etc. Penelope can also monitor user-defined fields for specific values or changes in values (e.g. demographic fields, client age, language needs, disabilities, safety concerns, etc.).

Our workflow tools generate tasks, such as alerts, notifications, smart forms, checklists, and reminders, that are assigned to specific staff, categories of staff or even clients!

Tasks and communications can be sent to mobile devices or pop up onscreen for maximum efficiency. Supervisors can monitor task completion of their staff from their own dashboard. Nothing will fall through the cracks ever again!
| **IMPROVED QUALITY & CONSISTENCY OF SERVICE** | With workflow automation, case workers - and clients - stay on track with the steps, tasks, milestones and mandatory information elements and checkpoints determined by your organization’s best practices, care planning, business processes, and regulatory requirements. |
| **HIGHER CLIENT THROUGHPUT** | Time-saving workflow automation processes can reduce wait times, lower no-show rates, and contribute to higher client throughput rates (more clients receiving appropriate levels of service by the same number of service providers). |
| **IMPROVED COMPLIANCE & ACCOUNTABILITY** | Penelope’s workflow automation tools support a data-driven quality assurance framework that allows monitoring of compliance to your organization’s best practice processes and regulatory requirements, while helping identify high-performing providers (as a bonus, your accreditors will love it!). |
| **LOWER COSTS** | Streamlined resource and task management save time and lower administrative costs. Reduction in duplicate effort and wasteful manual administrative processing of routine tasks. Services (and resources) can be better targeted where they are needed most. |
| **IMPROVED CLIENT OUTCOMES** | Penelope’s workflow automation tools can automatically monitor scores or changes in scores within your custom assessments, clinical tracking tools, or any smart form, including those that clients complete themselves online. You can ensure that your resources are allocated where they are needed most to address a client’s change in wellbeing in an agile, responsive manner. |
Penelope not only provides powerful collaboration, communication and workflow tools for your staff and stakeholders, but these tools can also be used to create powerful new ways to deepen your engagement with clients as well!

You can use Engage - Penelope’s client engagement portal - to automatically send custom smart forms to clients to complete online.

For example, first-day paperwork, feedback and satisfaction surveys, aftercare followup, preservice documents and information, even items like group information and confirmation that services were delivered (e.g. home-based care).

- fully responsive design is mobility-optimized to work on any device - especially phones!
- WCAG AA accessibility compliant
- secure, encrypted data transfer with no residual data cache on the client’s device
- provides e-counselling platform / asynchronous chat for work with remote clients or communications with family members and caregivers

New Pathways for Engagement
## benefits of improved Client Engagement

| **IMPROVED CLIENT OUTCOMES** | • Improved client outcomes (such as emotional health, symptom resolution, sense of empowerment, levels of anxiety, healthy behaviours, reduced isolation, and general levels of functioning)  
• One of the strongest predictors of positive treatment outcomes is the degree of participation of clients in their treatment |
| **IMPROVED CLIENT SATISFACTION** | • Improved client satisfaction with quality, level and responsiveness of care  
• Satisfied clients are more likely to show and continue their treatment (and as a result are more likely to have better outcomes!) |
| **IMPROVED FINANCIAL PERFORMANCE** | • Reducing no-show and dropout rates improves the bottom line while also reducing wait times and making room for increased admissions/client “time to service” metrics  
• Engage can serve as a thermometer, allowing your agency to allocate resources where they will have the greatest impact  
• Reduced data entry and administrative burden |
| **IMPROVED PROCESS IMPROVEMENT** | • Penelope’s Engage feature is an easy to implement method of high frequency collection and reporting on client feedback  
• Clients can use Engage to verify that services occurred, quickly rate them, and provide other valuable feedback to inform your organization’s quality assurance and improvement processes |
| **IMPROVED MARKET COMPETITIVENESS FOR YOUR AGENCY** | • Engage empowers you to provide a level of client service that will differentiate your agency from your peers, enabling your organization to stand out with the community, referral agencies, employees, potential customers, stakeholders and funders |
Collaboration at work: example.

A community organization refers a client to your organization for a given set of services. With the client’s consent, your staff then create a basic case profile in Penelope with a status of ‘pending,’ adding the referral details and putting them on the wait list for the appropriate service(s).

Adding a client to the wait list can trigger some workflow automation to notify appropriate parties. As well, the wait list entry itself (or even the referral) provides a workspace where your staff can discuss any unique aspects of the service request, e.g. risk concerns, special needs, or information on appropriate services at your agency.

Provided appropriate security authorizations, each of the team who are added as ‘followers’ of a discussion thread related to the client are automatically notified about any contributions in real time and can respond quickly and easily, forming a comprehensive document that contains staff insights and contributions to the processing of the wait list entry / referral, all with a view to connecting the client to the most appropriate resource and service as quickly as possible.

With Engage, the client themselves can participate in this collaborative discussion directly using their mobile phone. Offers made to the client for services or appointment times, as well as the client’s response and other communications with the client, also get logged in this comprehensive discussion thread. After a pre-defined period of waiting, Penelope’s workflow automation can escalate the situation to another staff member or group.
Penelope’s workflow automation tools can push out smart forms, assessments and actions to clients and staff to complete, but did you know *Penelope can monitor the data being completed* to raise alerts or trigger workflows if, for example, a client’s score or score classification in a given smart form or assessment reaches a certain agency-defined threshold or even if the *change in score* for these documents over time reaches a certain threshold.

In other words, with all of these documents flying back and forth, amidst a mass of other often chaotic work, it’s often easy to overlook warning signs, to make sure appropriate parties are notified, and to take appropriate, considered action.

Penelope remains vigilant and can make sure none of these warning signs or client well-being metrics go unheeded.

This provides an immensely valuable clinical service in support of maximizing value-based care in the context of reduced administrative costs.
Client Engagement at work: example.

1. **First-day paperwork** - as part of your admissions process, there might be a set of documents, such as consents, confidentiality notices, self-reported assessments, etc., that must be completed prior to service enrollment.

With Penelope, these and other smart forms can be automatically sent to the client via e-mail for completion online. Their completed forms are then saved within their file and the appropriate staff are notified when they are completed.

This saves a tremendous amount of administrative time (re-keying of data, etc.), and improves data accuracy. In addition, the client can receive an automatic e-mail or SMS reminder which they can then use to confirm their attendance in an upcoming appointment. These reminders not only provide a better experience for the client, they have been proven to dramatically reduce no-show rates.

2. **Client feedback** after each appointment (or self-ratings prior to the session) - before and after each session you can automatically e-mail smart forms to the client to complete, providing an easy way to gather valuable ongoing outcomes and evaluation data.

3. **Home-based services** - uses of Penelope include: automatic e-mail confirmation that services were delivered and / or a quick self-reported level of functioning survey and feedback to help ensure quality assurance, and staff accountability.
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