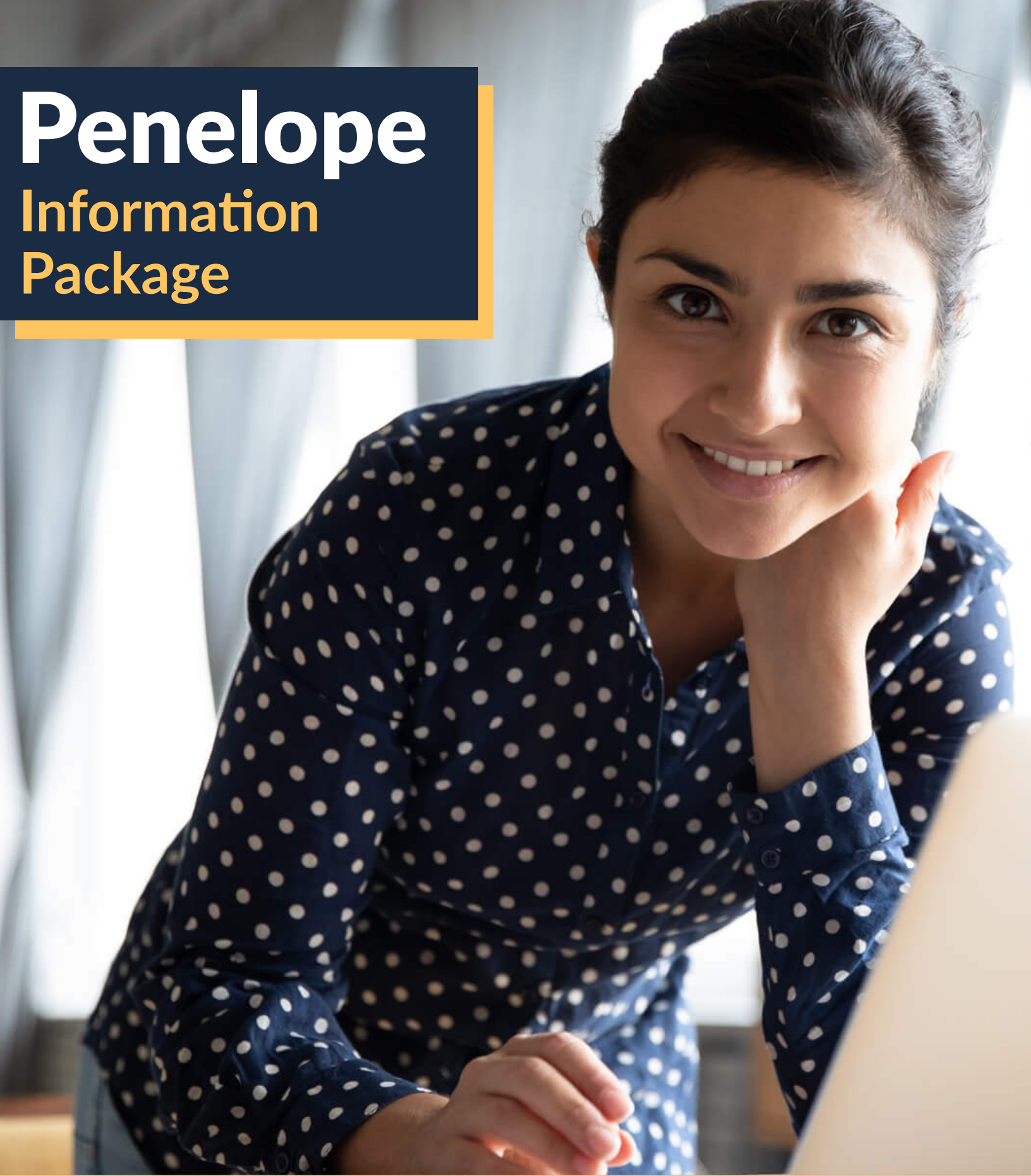# Penelope
Information Package

Meet Penelope.

We are Athena Software and we've been empowering our customers to make a difference in the lives of the people they serve for almost 20 years.

Our product, Penelope, is a reliable and configurable cloud-based case management system that helps hundreds of social service and nonprofit agencies around the world manage and track client and service data in one place, streamline their processes, and improve client outcomes, while keeping data secure.

In our two decades of experience working with human service organizations, we've found that embracing a leading technology solution like Penelope can help improve data accuracy and save time for staff, while generating increased capacity for service delivery, better reporting, and improved client engagement and satisfaction.

Read on to learn how Penelope can help your organization achieve your mission.

"**Penelope is our friend in so many ways! She makes documentation, scheduling, reporting, and invoicing easy. So much time is saved!**"

Rebecca Mohler, Sendero Therapies, USA

Get the Complete Package.

Penelope is a comprehensive and intuitive case management software solution, and your investment in our solution is supported by start-to-finish professional services, secure cloud hosting, and support that's helpful and friendly.

Get Value for Money

Penelope comes equipped with the case management tools you need, including: scheduling, billing, smart forms and assessments, referral management, automated workflows and tasks, client engagement tools, and demographics tracking, just to name a few!

Feel Safe and Secure

Protect your data with a reliable and secure cloud-based solution that won't crash and lose your work. We are also ISO certified for information security management, and our secure data centres provide a 99.99% uptime guarantee, so your system is always available for your staff.

Manage Change With Confidence

Our Professional Services team contains experienced business analysts with deep knowledge of Penelope and industry best practices, many of whom have extensive experience working in social services. Our approach to implementation, and our custom reporting and integration options, adds even more value to your investment in Penelope.

Enjoy Friendly and Timely Support

Our technical support specialists are always at the ready to provide polite and responsive help, including urgent support that's available 24/7/365.

"For the first time, our organization has been able to capture better client and partner data that has allowed our multiple departments to work more cohesively."

Courtney Wickberg, A Precious Child, USA

Designed For You.

In our almost 20 years of business, we've been listening to our customers' feedback and using it to evolve and shape the changes we make in Penelope. Here are just some of the ways Penelope can help maximize the value of your investment and make life easier for your staff and clients.

Keep all client information in one place	Conveniently track each client or family's information in one case file that contains their service history, notes/documents, communications, and more.
Improve the client experience	Empower your clients to participate in their care using mobile engagement tools like our client portal, ClientConnect, and online web form, Add.Me.
Streamline your processes with automated workflows	Automate your workflows by using action triggers to send notifications, tasks, and alerts - like SMS and email appointment reminders - to staff and clients.
Use detailed reports to make better decisions	Organize your data in an unlimited number of ways with our flexible reporting and export options, and access stunning data visualizations with Tableau, our add-on reports suite.
Track staff time and make scheduling easy	Easily schedule appointments for staff and clients across multiple locations, use event reminders to reduce no-shows, and get one-click access to a snapshot view of all appointments at your agency each day.
Keep your team connected	Securely send messages to team members and manage your calendar to stay on top of tasks, reminders, and appointments.
Save time with smart forms	Eliminate paper forms, improve accuracy, and reduce data entry with our smart and easy-to-use document creation tool.
Easily track referrals	Get a complete picture of each client's journey, from intake to aftercare, with comprehensive inbound and outbound referral tracking.
Track billing activities for clients and funders	Manage invoices, payments, and credits for clients and funders with our convenient, out-of-the-box A/R billing module.
And so much more!	Visit <u>our website</u> or give us a call to learn more about our robust feature set!

> **"Best case management software ever! It's all in one - we don't have to fool around with multiple software programs for various functions."**
>
> Kim Hamilton, CCRC Peterborough, Canada

Enjoy Security and Support.

Guaranteed Data Security

Athena's dedication to data privacy is at the core of everything we do. By partnering with AWS as our data hosting provider, we're able to provide our customers with industry-leading cloud hosting services that meet the very highest standards of reliability, availability, redundancy, and data security.

Athena is also ISO/IEC 27001:2013 certified for our information security management systems, and we are trusted by tens of thousands of users around the world to store and protect confidential client information.

Penelope is also backed by a 99.99% uptime guarantee so you can focus on helping your clients while we take care of system updates, backups, and disaster recovery. For more information, download our Privacy and Security white paper.

World-Class Implementation and Support

Our Professional Services staff are experienced business analysts with in-depth knowledge of Penelope and industry best practices. They are uniquely qualified to assist our customers, as many have previously worked in the human service and nonprofit sectors, and this first-hand experience allows them to understand the day-to-day challenges our customers face and see potential roadblocks before they arise.

From providing comprehensive implementation and end-user training to configuring Penelope to fit each agency's needs, they're available to help every step of the way, adding even more value to your investment.

In addition, our friendly and knowledgeable support staff provide helpful and timely responses to customer inquiries—including urgent 24/7 support—so you'll never be left without answers.

> "Penelope has been so easy for us to use. The support staff are friendly and understanding, and are great with training. I would highly recommend."

> Sarah Gardner, ARC Administrative Services, USA

Collaborate and Work Together.

Penelope provides a full suite of collaboration and workflow automation tools to help improve the quality and efficiency of the services your staff provides.

By placing each Penelope user at the centre of their own role-specific communications and task management centre, our convenient Collaboration Suite keeps your staff on top of their to-do list with timely notifications, reminders, and alerts.

Staff can also choose to receive appointment reminders and messages on their phones when not logged into the system, and Penelope's automated workflows make sure the right information gets to the right people at the right time.

Download our workflow automation and collaboration white paper for more details.

"A valuable and reliable source of organizational data, as well as an essential tool for sharing information within a multi-disciplinary team."

Richard Stables, Headway, Ireland

Engage With Your Clients.

It's important to enable your clients to actively participate in their care and provide their family members and caregivers with the option to be involved as well. Athena Software offers a variety of client engagement options for Penelope that are designed to help you connect with your clients and those who are part of their care journey.

Our **Client Engagement Options** include:

ClientConnect is the mobile client portal for Penelope that empowers clients to participate in their care while improving outcomes and providing transparency, accountability, and trust. Clients can check messages from their providers, schedule new appointments, pay online or check their account balance, review tasks, keep their contact information up to date, and much more.

With Engage, staff can send send service-related emails or text messages directly to clients and allows clients to securely complete documentation on their computer or mobile device. Interactions between patient and provider through Engage automatically become part of the client's clinical record in the system, requiring no extra effort from staff.

Streamline client intake with Add.Me, our configurable web form tool that allows your clients to add themselves directly into your Penelope database securely and seamlessly while reducing time-consuming data entry hours. Additionally, Add.Me Import allows your agency to import multiple client records at once simply by uploading a CSV file to Penelope.

"We have used Penelope since 2003. It is very versatile and many changes have been done to make it portable and easy to use."

Linda Castle, The Family Conservancy, USA

Get the Solutions You Need.

As flexible as Penelope is, there may be times when some additional connective work is needed to bridge a unique gap between our software and other systems, or legacy data.

We can also add value by creating custom reporting dashboards, web services integrations, or sometimes all that's needed is just some help building documents or configuring the system.

We also work with experienced integration partners to provide cloud-based, real-time integration services with data transformation and multiple endpoints. If there's anything you need, just ask us!

"Having Penelope track the data that we need to use to report to our funders has been invaluable. We have saved countless hours of time because we built our database to suit our reporting needs."

Susan Robins, Vita Centre, Canada

Let's Become Partners.

Penelope is trusted by governments, health networks, military and police services, universities and school boards, and hundreds of nonprofit organizations around the world. Penelope is scalable and flexible, and can grow with your organization.

Athena Software has been built on a culture of innovation, collaboration, customer service, and commitment to security and community. These attributes ensure that all of our customers are treated with respect and viewed as partners by all Athenians. We are an inclusive, diverse company with female co-ownership, and we were recently included in the Deloitte Fast 500 as one of the fastest-growing technology companies in North America.

If your agency is looking for a comprehensive, flexible, secure, and easy-to-use system for managing, tracking, and reporting on client and service information, Penelope is the solution for you.

"Our relationship with Athena has been a true partnership right from the start. Whether it's helping to bring on new staff, working through a system update, or implementing a new process, the Penelope staff have always been great to work with. It definitely makes a difference."

Adam Russo, Edgewood Clinical Services, USA

Athena Software

Penelope by Athena Software can help your organization improve efficiency and client engagement while saving time for staff. Contact us to schedule a complimentary consultation with a Penelope expert.

866.806.6014 // athenasoftware.net

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