Simplified Search – Penelope

April 2023

australian
community
support
organisation

What is Changing

- ✓ We are adding a **Case** Tab to simplify searching for Clients in Penelope. This will replace the **Service** and **Event** search Tabs.

- ✓ You will be able to search by **Surname** or **Case Id** in the Case Tab

Why is it changing?

- ✓ We have received valuable feedback advising that the current search methods are difficult to navigate

- ✓ You told us that you wanted a more holistic view of your client's current activity within their case.

- ✓ Currently the Penelope Client search function is creating a privacy issue.

When is it changing?

- ✓ The existing Search options will change from Event ID to Client ID or Surname from April 3rd, 2023
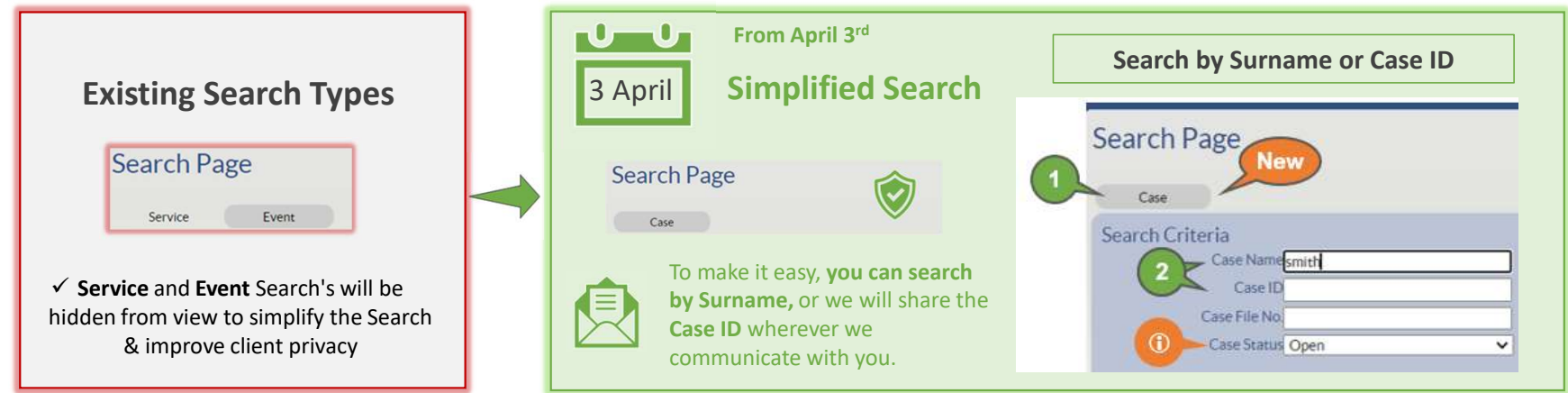
Load on Penelope Website

Simplified Search - Penelope

As you know, ACSO recently transitioned to a new version of Penelope. We spoke with many of you, heard your concerns, and gained insights on how to improve the user experience. The most common feedback was that searches were returning a long list of results, causing a need for additional effort in locating clients. You also asked if we could provide a more accessible view of your active client cases and history.

Based on your feedback we are improving Penelope, so you can search for a client by simply using a **Surname** or **Case ID**, from the **Case Tab.** You will immediately be able to see the current and historic cases of clients allocated to you, without having to sort through a long list. Another benefit is that you will now see a bird's eye view of your client's current activity within their current case.

Think of the Case Tab as the new door to your allocated client's information when searching in Penelope.

Existing Search Types

Search Page

Service   Event

✓ **Service** and **Event** Search's will be hidden from view to simplify the Search & improve client privacy

From April 3rd

3 April

Simplified Search

Search Page

Case

To make it easy, **you can search by Surname,** or we will share the **Case ID** wherever we communicate with you.

Search by Surname or Case ID

Search Page   **New**

1   Case

Search Criteria

2   Case Name: smith
Case ID:
Case File No.:
ⓘ Case Status: Open

Where can I get more information about this Change?

✓ We have developed a series of videos, QRGs (quick reference guides) and FAQs (Frequently asked Questions) explaining the improvement. Copy & Paste this Link –
   https://www.acso.org.au/professional-referrals/penelope/
✓ Further updates will be sent closer to the time via the News function on Penelope.
✓ Simply click the News Icon if you see a red dot on the News Icon on the left hand side of the Penelope Tool bar

Please refer to the these guides in the first instance if you are experiencing difficulties with navigating the system or locating client files. If you still need help, email upgrade@acso.org.au.

What we do now	What's Changing	Benefit	Impact
Search in Event Tab using **Event id or Attending Individual**	Search in Case Tab, using **Case id or Surname**	✓ Simplifies search process for users ✓ Option to search via Surname or Case ID ✓ Able to see all client activity allocated to user, 'birds eye view' of current case ✓ Easier for users to access all service files (i.e., assessment and treatment)	✓ Slight process change ✓ Users will land in a client's **Case** instead of Service Event & will need to click on desired Service File, then Service Event to open ✓ Will take 2 extra mouse clicks

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✓ The Case Tab is a new tab which has been introduced to allow for simplified Searches using a **Client Surname** or **Case ID**
✓ This replaces the previous search using the **Event** Tab and **Service** Tab.
✓ The Service & Event searches will be hidden.
✓ Only assigned cases can be seen

How to - Step by step

1. Click on the **(Case)** button
2. Enter either the Client **Surname** or the **Case ID**
3. Click **(GO)**
4. Click on the **Case ID or Case Name** to open the Case
5. Click the **Service File** you would like to open

Search Page

back | search | delete | edit

Portal Play CCSWorker
Tue 21-Mar-2023

① Case **New**

Search Criteria

② Case Name: smith
Case ID:
Case File No.:
Case Status: Open

Primary Member Site: [dropdown]
☑ Include Site Tree

-Auto Fill-
From: dd/mm/yyyy
To: dd/mm/yyyy

③ Go

✓ The Case Status show open cases . You can change it to **blank** to see all your allocated cases (Open & Closed)

Results
1 - 3 of 3

Case ID	Case Name	Case Status	Open Date	Primary Member	Site	File No.
164903	SMITH CCO 01/01/2022 (12) #1	Open	18-Nov-2021	Smith, George	ACSO Brisbane Metro	
198877	Smith Custody CCO 01/01/23 (12) #1	Open	01-Jan-2023	Smith, John	ACSO Traralgon Hub	
77837	SMITH VAOD 24/09/2018	Open	24-Sep-2018	Smith, Joan	ACSO Ballarat Hub	

④

Case

back | search | delete | edit

Profile | Intake Summary | AOD Case Information | Messages

SMITH CCO 01/01/2022 (12) #1
ID 164903
Case Status Open
Open Date 18-Nov-2021
Closed Date
Annual Income 0
Family Size 1
File No

Members
● George Smith ⚠
94137196

Self
18.10.2022

25-Dec-2000

Service Files

All Open Only 3 of 3

Service	Event	Primary Worker	Presenting	Next Event
● AOD - Counselling Complex	2/0/2	ACSO, Richmond	George Smith	
● AOD - Counselling Standard	0/0/1	ACSO, Richmond	George Smith	
● COATS Assessment	1/0/1	ACSO, Richmond	George Smith	

⑤

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Case view
✓ Provides a bird's eye view of the Client case
✓ Easily view and select the service you need (treatment or assessment files)
✓ You can now search using a single Case ID, rather than having to search multiple event ID's

Why can't I see the Service and Event Tabs on Penelope anymore?

From April 3, all searches will be completed using the **Case Tab**. This simplifies the search and provides an ability to find **allocated clients**, via **Surname** and **Case ID.**

Can I search by Surname for current and historical Cases?

Absolutely, one of the benefits of the Case Tab Search is the ability to search for clients using their Surname. You can only see clients who have been allocated to you.

Where can I get a Case ID, so I can Search for a Client in the Case Tab?

You can search using a client's Surname by using the **Case Name** field. ACSO will also send you the **Case ID** wherever we communicate with you, so it's easy to search. Simply enter the Case ID straight into the **Case ID** field. It is more streamlined as a process and will also enable you to choose if you want to see all, Open, or Closed cases.

What is the difference between an open and closed case?

Open cases show current referrals and episodes of care. Closed cases show historical referrals and episodes of care.

Can I still search using an Event ID?

From April 3, the **Event Tab** will no longer be visible. All searches will be completed using the **Case Tab**. This simplifies the search and provides an ability to search for allocated clients using a **Surname** and/or **Case ID.**

Can I see a Client's historical cases if they were allocated to me previously?

Yes, you can see all details for the Service file that you were allocated to. Leave the **Case Status** field blank when searching, to view historical information allocated to you.

Can I filter my search to look for a specific Case Service (Service File)?

No, however by clicking into the case you will have a bird's eye view of all your allocated service files. Simply select the service file you require.

Where can I find the Event ID for VADC Reporting:

The Event ID is still available on Penelope if required for VADC reporting, please refer to the VADC Reporting Slide in this pack

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Case

Profile Intake Summary AOD Case Information Messages

SMITH CCO 01/01/2022 (12) #1

ID 164903
Case Status Open
Open Date 18-Nov-2021
Closed Date
Annual Income 0
Family Size 1
File No

Members
George Smith
94137196
Self 25-Dec-2000
18.10.2022

Service Files

All Open Only 3 of 3

Service	Event	Primary Worker	Presenting	Next Event
AOD - Counselling Complex	2/0/2	ACSO, Richmond	George Smith	
AOD - Counselling Standard	0/0/1	ACSO, Richmond	George Smith	
COATS Assessment	1/0/1	ACSO, Richmond	George Smith	

1

Service File

Profile Notes Messages

AOD - Counselling Standard
SMITH CCO 01/01/2022 (12) #1 / Service File

ID 459778
Status Open
Start 03-Apr-2023
End 02-Oct-2023
Close Reason
Close Notes
Estimated Sessions
Estimated Completion -

Participants
George Smith 94137196

Workers
ACSO, Richmond   Primary Worker
Play CCSWorker, Portal Not Attending

Service Events

All Booked Filtered 1 of 1

Date ↑	Time	Event Desc	Dur(Min)	Status	Booked By	Event Type
Mon 03-Apr-2023	10:00 AM	1 Session	60	Booked	(W) Penelope Administr	Client Contact

2

Service Event

back search delete edit

Prev Next

Mon 03-Apr-2023 10:00 AM 1 hour
SMITH CCO 01/01/2022 (12) #1 / AOD - Counselling Standard / Event

1 Session
03-Apr-2023 10:00 AM   ACSO Central Office   Booked   ACSO, Richmond
03-Apr-2023 11:00 AM   Do not call to confirm Client Contact Smith, George
                                                 728346
                                                 Booked By: Worker - Penelope Administrato

Location 1 Hoddle St
          VIC 8001

3

Where can I find the Event ID for VADC Reporting:

The Event ID is still available on Penelope if required for VADC reporting
(This is also known as the ACSO COATS identifier)

How to - Step by step

1. Click on the service you require, within the **Case**. *(This will open the Service file)*
2. Click the Service event, within the **Service File**. *(This will open the Service event)*
3. The **Event ID**, can be found in the centre of the **Service Event** screen

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