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Example Group Service Selection Worksheet

This document is an example of how the Group Service Selection Worksheet might be completed by a typical group practice which has 8 clinical staff members and 2 administrative staff members (total 10 staff members.)

# Services Recipe Function List

|  |  |  |
| --- | --- | --- |
| **Function** | **Service Name** | **Notes** |
| Record-Keeping | My Favorite Practice Management System |  |
| Payment Processing | My Favorite Practice Management System for clinical services, Acuity Scheduling for wellness groups |  |
| Invoicing | My Favorite Practice Management System |  |
| Billing (if not done by workforce) | My Favorite Practice Management System |  |
| Inbound Voice Calling | iPlum |  |
| Outbound Voice Calling | iPlum |  |
| Conventional (SMS) Texting | iPlum | Clinicians will use discretion to decide which clients may need/benefit from using conventional texting (as opposed to the secure texting app from iPlum.) In such cases, the clinician will offer the Request for Nonsecure Communications process to the client. |
| Secure Texting/Mobile Messaging | iPlum | Reception team will talk to clients about downloading the app before their first session. Clinicians will follow up on that if the client hasn’t downloaded it but wants to text with their clinician. |
| Conventional Email | Google Workspace (Gmail) | Clinicians will use discretion to decide which clients may need/benefit from using conventional email (as opposed to secure email or the secure texting app from iPlum.) In such cases, the clinician will offer the Request for Nonsecure Communications process to the client. |
| Secure Email | LuxSci Secure Connector | LuxSci is Integrated with Google Workspace Gmail.When providing superbills and records releases to clients, we do so through the client portal in My Favorite Practice Management System |
| FAX | iPlum |  |
| Appointment Scheduling | My Favorite Practice Management System for clinical calendar, Acuity Scheduling for wellness groups |  |
| Client Self-Scheduling | My Favorite Practice Management System for clinical calendar, Acuity Scheduling for wellness groups |  |
| Appointment Reminders | My Favorite Practice Management System for clinical calendar, Acuity Scheduling for wellness groups |  |
| Appointment Calendar | My Favorite Practice Management System for clinical calendar, Acuity Scheduling for wellness groups | The clinical calendar in My Favorite Practice Management System is also synchronized to Google Calendar as a backup |
| Intake Forms | LuxSci Secure Forms |  |
| Electronic Signatures for Online Forms | LuxSci Secure Forms |  |
| Contact Form on Website | LuxSci Secure Forms |  |
| Videoconferencing (i.e. for online therapy) | Google Workspace (Meet), Clocktree for backup |  |
| Telehealth Waiting Room | Google Workspace (Meet), Clocktree for backup |  |
| Telehealth Whiteboard | Google Workspace (Meet), Clocktree for backup |  |
| Telehealth Breakout Room | Google Workspace (Meet), Clocktree for backup |  |
| Telehealth Video Recording | Google Workspace (Meet), Clocktree for backup |  |
| Telehealth Group/Family Meetings | Google Workspace (Meet), Clocktree for backup | Clocktree is limited to 4 people on the call! |
| E-Prescribing |  |  |
| Office Software (i.e. Writing Documents and Spreadsheets) | Google Workspace (Docs + Drive) |  |
| Internal Team Communication | Google Workspace (Chat + Meet) |  |
| Web Hosting | Squarespace |  |
| Practice Internet Connection | Comcast Office Internet | Team members also use personal cellular data and may use home Internet connections according to the Home Office Internet Policy |
| VPN (Virtual Private Network) | NordVPN Teams |  |
| Password Management | 1-Password Teams |  |
| Password Management Shared Vaults | 1-Password Teams |  |
| Cloud Data Backup |  | All data is on online services which perform their own backups |
| CRM ( Customer Relationship Manager) |  |  |
| Email/Marketing Newsletter (e.g. MailChimp, Constant Contact, Keap) |  |  |
| Directory Profiles | Psychology Today |  |
| Accounting (if not done by workforce) |  |  |

## Workforce Members’ Personally-Owned Service Functions

Indicate which Functions you will permit/expect workforce members to fill using their personally-owned services.

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| --- | --- |
| **Function** | **Notes** |
| Practice Internet Connection | Cellular data on personal phone services may be used to give an Internet connection to devices used for practice business. Team members who use home offices may use their home Internet connections so long as they set up their security according to our Home Office Internet Policy (see <https://personcenteredtech.com/courses/teletherapymobile2020/> for more info on home office Internet) |
| VPN (Virtual Private Network) | Team members may use personally-owned VPNs, but we supply them with a NordVPN account |
| Password Management | Not permitted. Team members are required to use the 1-Password account assigned to them to store passwords for all their practice accounts |

# My Service Cards

Paste below the Specific Service Cards that you chose for your recipe.

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| My Favorite Practice Management System

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| **Function** | **Notes** |
| Record-Keeping |  |
| Payment Processing | Reception will talk to new clients on the phone about signing up for the client portal |
| Invoicing | Reception will talk to new clients on the phone about signing up for the client portal |
| Billing |  |
| Secure Email | Only when pushing superbills and records releases to the client portal. Reception will talk to new clients on the phone about signing up for the client portal |
| Secure Texting/Mobile Messaging |  |
| Client Self-Scheduling |  |
| Appointment Scheduling |  |
| Appointment Reminders | Talk to clients at first session about signing up for appointment reminders and giving the authorization to send unsecured texts and/or emails |
| Appointment Calendar | Will be automatically synchronized with Google Calendar |
| Intake Forms |  |
| Electronic Signatures for Online Forms |  |
| Videoconferencing (i.e. for online therapy) |  |
| Telehealth Waiting Room |  |
| Telehealth Whiteboard |  |
| Telehealth Breakout Room |  |
| Telehealth Video Recording |  |
| Telehealth Group/Family Meetings |  |
| E-Prescribing |  |
| Internal Team Communication |  |

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| [Google Workspace](https://workspace.google.com/pricing.html) (aka GSuite, aka Google Apps for Business)Essentially, a paid version of a Google account. Provides a wide variety of services and will enter into a Business Associate Agreement to cover those services. Business Plus Plan tier necessary for Vault and additional HIPAA compliance necessary/supporting functionality.

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| **Function** | **Notes** |
| Cloud Data Backup |  |
| Inbound Voice Calling |  |
| Outbound Voice Calling |  |
| Conventional (SMS) Texting |  |
| Conventional Email |  |
| Appointment Calendar | Will be a backup calendar for the calendar in My Favorite Practice Management System |
| Intake Forms |  |
| Videoconferencing (i.e. for online therapy) |  |
| Telehealth Waiting Room |  |
| Telehealth Whiteboard |  |
| Telehealth Breakout Room |  |
| Telehealth Video Recording |  |
| Telehealth Group/Family Meetings |  |
| Contact Form on Website |  |
| Office Software (i.e. Writing Documents and Spreadsheets) |  |
| Internal Team Communication |  |

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| [iPlum](https://iplum.com/pricing/)Very low cost for a very wide set of functions. The low cost also means low levels of direct support. Also, iPlum can only be used as a smartphone app or web app. For many practices, however, that is exactly what they need.

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| --- | --- |
| **Function** | **Notes** |
| Inbound Voice Calling |  |
| Outbound Voice Calling |  |
| Conventional (SMS) Texting |  |
| FAX |  |
| Secure Texting/Mobile Messaging |  |

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| [LuxSci Secure Connector](https://luxsci.com/hipaa-compliant-smtp-connector.html)Add-on secure email service functionality that integrates with Google Workspace Gmail or Microsoft Office 365 email, allowing your practice to leverage the power of your Business Software Service email with secure email *without* your team needing to switch to/login to a different email service for secure email functionality. Forced TLS email means the user experience of receiving a secure email is no different from a conventional email user experience for the vast majority of email recipients. Can also easily opt to send escrow style secure email on an email-by-email or user-by-user basis, as warranted by risk management needs.

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| **Function** | **Notes** |
| Conventional Email | Using Google for conventional email |
| Secure Email | Used from Google Workspace Gmail |

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| [LuxSci Secure Forms](https://luxsci.com/hipaa-compliant-forms)Robust secure form service and form builder for intake form and secure contact form needs. 3-form package available when bundled with LuxSci’s Secure Connector secure email service, for practices that don’t have the number of forms in the standalone form service.

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| **Function** | **Notes** |
| Intake Forms |  |
| Electronic Signatures for Online Forms |  |
| Contact Form on Website |  |

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| [Acuity Scheduling](https://www.squarespacescheduling.com/signup.php)Robust appointment scheduling service that supports multiple locations and providers, plus group and workshop scheduling. Popular service for practices that do wellness groups/workshops in addition to providing traditional therapy services, who need a HIPAA appropriate means of scheduling, registering, and taking payment that is not through their practice management/EHR system. Powerhouse tier required to obtain HIPAA BAA.

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Appointment Scheduling |  |
| Client Self-Scheduling |  |
| Appointment Reminders |  |
| Appointment Calendar |  |
| Payment Processing  | Takes payments for wellness groups |

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| [Clocktree](https://www.clocktree.com/pricing)An especially solid *backup* option for group practices that need a videoconferencing-for-telehealth backupplatform that’s affordable. Pricing is based entirely on hours used, not the number of providers/users. No long term contracts are required.

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Videoconferencing (i.e. for online therapy) | Backup for Google Meet |
| Secure Texting/Mobile Messaging |  |
| Appointment Scheduling |  |
| Appointment Reminders |  |
| Appointment Calendar |  |
| Telehealth Waiting Room |  |
| Telehealth Group/Family Meetings | **Limited:** Up to 4 separate participants |

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| [Squarespace](https://www.squarespace.com/pricing/)

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| **Function** | **Notes** |
| Web Hosting |  |

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| [NordVPN](https://nordvpnteams.com/)Slightly more complex to configure and setup than TunnelBear. NordVPN has more servers and therefore less impact on connection speed than TunnelBear, making it better suited for users who need the VPN enabled when doing teletherapy video sessions. NordVPN includes an auto connect function. Each user account on NordVPN secures up to 6 connected devices simultaneously.

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| **Function** | **Notes** |
| VPN |  |

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| [1-Password](https://1password.com/teams/)

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| **Function** | **Notes** |
| Password Manager |  |
| Password Management Shared Vaults |  |

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| Directory Profile Service: Psychology Today

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| **Function** | **Notes** |
| Directory Profiles | We turn off the contact form and phone number routing, so no PHI is handled |

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| Local Internet Service: Comcast Office Internet

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| **Function** | **Notes** |
| Practice Internet Connection |  |

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# My Services List

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| --- | --- | --- | --- | --- |
| **Service Name** | **BAA Executed Date (Or reason no BAA is needed)** | **Service Tier** | **$/user/mo.** | **Subtotal $/mo.** |
| My Favorite Practice Management System | Jan 31st, 2013 | Group | $49 | $490 |
| Google Workspace | Jan 31st, 2013 | Business Plus | $18 | $180 |
| LuxSci: Secure Connector  | Jan 31st, 2013 | N/A | $7 | $70 |
| LuxSci: Secure Forms | Jan 31st, 2013 | Shared | N/A | $50 |
| iPlum | Jan 31st, 2013 | Measured Plan + Backup Basic | $8 | $80 |
| NordVPN Teams | Conduit, no BAA needed. | Basic Annual | $7 | $70 |
| Clocktree (for backup TMH platform) | Jan 31st, 2013 | Basic | N/A | $29 |
| 1-Password Teams | No PHI is handled. | Teams | $4 | $40 |
| Acuity Scheduling | Jan 31st, 2013 | Powerhouse | N/A | $50 |
| Squarespace | No PHI is handled. | Personal | N/A | $12 |
| Psychology Today Profiles | We turn off the contact form and phone number routing, so no PHI is handled | N/A | $30 (x8 clinicians) | $240 |
| Comcast Office Internet | Conduit, no BAA needed. | N/A | N/A | $50 |
| **TOTAL COST $/Mo.** | $1,361 |