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# Using This Workbook

This workbook is intended to be a companion to the online course, “Designing a Group Practice’s Tech Setup for Success: Effectiveness, HIPAA Compliance, Client Safety, and Efficiency”. It is sold on a pay-what-you-can basis, and so is accessible to all. Find it here: <https://personcenteredtech.com/service-selection-support-for-mental-health-professionals/>

This workbook is one component of “The Person Centered Tech Way” for using tech to make therapy group practice leadership efficient, enjoyable, helpful, cost effective, and supportive of HIPAA compliance needs. Here’s how this workbook fits into the bigger picture:

## Achieving Therapy Practice Tech Awesomeness The Person Centered Tech Way, for Group Practice Leaders

* [Teletherapy Practice Certification](https://personcenteredtech.com/marketplace/#group-iron-out-teletherapy)
	+ [Leadership Training](https://personcenteredtech.com/product/group-tmh-director-supervisor-training/)
	+ [Staff Clinical Training](https://personcenteredtech.com/product/group-tmh-clinical-staff-training/)
	+ [Teletherapy Program Policies and Procedures](https://personcenteredtech.com/product/group-tmh-procedure-manual-and-practice-forms-pack/)
* [Risk Analysis and Risk Management Planning](https://personcenteredtech.com/marketplace/#group-identify-and-mitigate) (for HIPAA compliance)
* [HIPAA training](https://personcenteredtech.com/marketplace/#buy-hipaa-training-for-your-staff)
	+ [Security Officer Training](https://personcenteredtech.com/soendorsement/)
	+ [Clinician Training](https://personcenteredtech.com/courses/clinicalstaffcore/)
	+ [Admin Staff Training](https://personcenteredtech.com/courses/admincore/)
	+ [Security Awareness Training](https://personcenteredtech.com/product/securityawareness2020q3/)
* **Services Selection** ← This Workbook
	+ Service “Adopt and Drop” Process
* [Device Security](https://personcenteredtech.com/group-hipaa/)
	+ Practice Device Security Process
	+ Bring Your Own Device Training and Staff Device Registration Process
* [Workspace Security](https://personcenteredtech.com/group-hipaa/)
	+ Office Security Process
	+ [Home Office Security Process](https://personcenteredtech.com/marketplace/#successfully-manage-a-work-from-home-team)
* [HIPAA Security Policies and Procedures](https://personcenteredtech.com/marketplace/#group-build-solid-foundation)
	+ Guided Change Management for Implementing HIPAA Security P&Ps

##

## Who This Workbook is For

This workbook is primarily for leaders of private mental health therapy group practices.

That doesn’t mean it won’t work for members of other professions, or for mental health practices which include other professions. In fact, it will have pretty wide applicability for a wide variety of professions which perform some form of therapy. That said, we design it with mental health therapy practices in mind.

## Can I Share This Workbook With Colleagues?

We would love for you to spread the word and get this workbook into as many hands as possible. However, it will likely work much better to refer your colleagues to our site where they can download the proper version of the workbook, as well as access the accompanying presentation and any other supporting materials we include there.

You can find this workbook and its supporting presentation and materials at <https://personcenteredtech.com/service-selection-support-for-mental-health-professionals/>

Service Selection The Person Centered Tech Way:
Workbook for Group Practice Leaders

#

# Introduction

This workbook is all about simplifying a complex process in order to get some powerful results using what we like to call The Person Centered Tech Way.

This workbook has information about a large number of real-world services that you can use in your practice. What we wrote about those services, and how best to use them, is founded entirely on our opinions and experiences at the time of writing. It is also founded on 10+ years of experience advising therapist colleagues on the functions and services they can use to meet their practice management and client service needs.

In other words, this whole workbook is founded on The Person Centered Tech Way of managing tech in therapy practices. The Person Centered Tech Way gives therapy practices a framework for practice tech that is efficient, enjoyable, helpful, cost effective, and supportive of HIPAA compliance needs. While it is not the only way to build your practice tech, we think it is a really good one. We hope you will agree.

# What, Exactly, Do We Mean By “Group Practice”?

The Person Centered Tech Way of managing practice tech splits therapy practices into 2(ish) categories:

1. Solo and Solo+ Practices
2. Group Practices

A **solo practice** is one where the clinician runs absolutely everything with absolutely no one else working for their practice. Hiring service providers like billers and the like doesn’t lose the “solo” status.

A **solo+ practice** is one where there is only one clinician, and they have a non-clinical helper who helps them run their practice. This could be a formal employment relationship, such as a receptionist in the office. It could also be an informal relationship such as a spouse or partner who helps with billing and other admin matters. Either way, the practice has only one clinician and does not have *significant* workforce management or multi-user service needs now and in the future.

A **group practice** is a single practice entity with 2 or more clinicians. The need for workforce management and multi-user services is much more prevalent and likely to grow over time.

# The Goal of This Workbook

When you are done with this workbook, you will have developed a roster of cloud-based/online services for your practice which fills all your team’s functionality needs and makes your practice management more enjoyable, helpful, cost effective, and HIPAA compliance-supporting.

See the included group practice examples to get some ideas of where you’ll be headed with The Person Centered Tech Way of service selection.

# Instructions for This Workbook

As you progress through this workbook, you will develop a “recipe” of services you will use to manage your practice and serve your clients. Rather like the recipe for a delicious and nourishing meal, this custom mix of practice services should combine to form an efficient, enjoyable, helpful, cost effective, and HIPAA compliance-supporting set of services for your practice and for your clients.

To complete the service selection process and build your practice’s service recipe, you will need four things:

1. This workbook
2. The Group Tech Selection Worksheet
3. A web browser + Internet connection for researching the services you’re considering
4. To view the presentation that accompanies this Workbook. It is sold on a pay-what-you-can basis, and so is accessible to all. Find it here: <https://personcenteredtech.com/service-selection-support-for-mental-health-professionals/>

## Trying Multiple Recipes

You may want to try out multiple potential recipes before settling on your final one. For example, you may want to compare two sets of recipes to see which one costs less. Or perhaps you want to try different combos to see which one uses the fewest distinct services.

Whatever your goal, simply make as many copies of the Group Tech Selection Worksheet as you need to try out your different recipes.



## Step 1) Pick the Functions Your Practice Needs

Get out the Group Tech Selection Worksheet and go directly to the Services Recipe Function List.

*You will use this list to determine the full set of Functions your practice needs.*

Your first task is to pick the Functions your practice needs. You do that by weeding out the Functions you do **not** need. Whatever remains is the full set of Functions that your services selection recipe must provide in the end.

To see a description of what each Function is, jump to The Big List of Functions section of this workbook. It’s under Service Selection Cards.

**Very Important Note:** Group practices need to supply the functionality that their team needs. Team members should not use personally-owned services to fill the majority of practice Functions. There are a couple of reasons for this. See the presentation which accompanies this Workbook for more information. The few Functions which may be safely filled by team members using personally-owned services are clearly marked in the Big List of Functions.

Go through each line of the Services Recipe Function List and decide which Functions you need filled by an electronic service and eliminate the ones you do not need. Here are a couple reasons to eliminate a given Function on the list:

* **You will be performing that Function on paper.** E.g. If you intend to use paper records exclusively, you will eliminate the “Record-Keeping” function, because you don’t need an electronic service to provide that for you.
* **You don’t need or want the Function.** E.g. If you don’t desire to give clients the ability to self-schedule their sessions in an online calendar, eliminate the “Client Self-Scheduling” Function.

To eliminate a Function from the Services Recipe Function List, write several “X”s in the empty columns, or fill in the empty columns with a black background. Don’t delete the Function from the list and do not delete the name of the Function. As you go through the process, it is important for you to know which Functions you have opted out of using.

Here are a couple examples of what a Function row might look like after you have eliminated it:

|  |  |  |
| --- | --- | --- |
| Record-Keeping | XXXXXXXXXXXXXXXXX | XXXXXXXXXXXXXXXX |

Or

|  |  |  |
| --- | --- | --- |
| Record-Keeping |  |  |

As you go through the process, you may eliminate additional Functions or un-eliminate Functions. It is all good -- this workbook is here to help you meet your practice’s own needs.

## Step 2) Peruse the Service Selection Cards

Most of this workbook is a collection of “cards.” Each card falls into one of two categories:

1. **Specific Service Cards.** Cards that describe which of the Big List of Functions are provided by specific, named services (at the time of writing.) E.g. The Google Workspace card shows that it can fill quite a few Functions.
2. **Service Type Template Cards.** Cards that describe which of the Big List of Functions are typically provided by various service types. E.g. The Phone Service template card includes “Inbound Voice Calling” and “Outbound Voice Calling” in addition to other Functions which are filled by Phone Service providers.

We recommend skimming through and looking at both the specific service cards and the template cards to get familiar with which services fill which Functions.

You can certainly speed through this step if you already have a pretty good idea of which kinds of services provide which kinds of Functions.

**Very Important Note:** There are no service cards for Practice Management/EHR Services. That will be covered in the next step.

## Step 3) (Optional But Strongly Encouraged) Choose Your Practice Management/EHR Service

Nearly every practice uses a practice management system or EHR these days. For most of the people using this workbook, their system will be a central component of their practice tech.

In fact, why would you ever **not** need or want a Practice Management/EHR Service for your practice? The main reason would be that **you eliminated “Record-Keeping” from your Services Recipe Function List.** Record-keeping is usually the primary Function for these services. If you don’t need an electronic service for record keeping, there’s a good chance you don’t need a Practice Management/EHR Service. If that is the case, skip this step.

Given the importance of these systems, one would think that it behooves us to include various practice management systems and EHR service cards in this workbook. We have specifically chosen to **not include any such service cards**, however, for the following reason:

With Practice Management/EHR systems, it is vital that we watch out for **Feature Stuffing**.

One of this workbook’s strengths is its ability to help you get all your practice’s functional needs met by as few services as possible. This is all well and good… until you get fed up with the way that one of those services implements an important feature!

For most practice services, that’s not a problem. You need to switch phone services? There’s definitely effort involved, but it’s not too painful.

You need to switch Practice Management/EHR systems? Cue the horror soundtrack. It’s a nightmare.

For that reason, we need you to choose your Practice Management/EHR system based on how well it works for *your practice’s needs and priorities*. It never fails that a colleague of ours decides to use the same practice management system that all their peers rave about, only to discover that the way it handles billing/progress notes/what-have-you drives them bananas and they wish they’d never started using it. But now they’re stuck with a system they don’t like because it’s very difficult and expensive to switch Practice Management/EHR systems.

In fact, it is very common for a practice to not use all the features of its Practice Management/EHR system because it’s so hard for such a system to do *everything* well.

So, we recommend a different method of picking Practice Management/EHR systems from the one we recommend for everything else. Read on.

A) Choose your Practice Management/EHR system first, and then pick which of its Functions you will use

To help you do that, let us introduce another very resourceful person you should know about: Rob Reinhardt, of Tame Your Practice. Rob has run his own counseling practice for years, and has been helping therapists choose Practice Management/EHR systems for many of those years. His website has a thorough set of reviews of various different Practice Management/EHR systems which are designed for use by therapy practices. Rob’s reviews -- very importantly and usefully for your present task -- evaluate Practice Management/EHR systems for group practice functionality and usability needs.

So go check out [Rob’s Reviews of Practice Management/EHR systems](https://www.tameyourpractice.com/blog/cloud-practice-management-system-reviews/), and use them as a jumping off point to help you draft a shortlist of candidates for your practice.

We strongly recommend investing the time in experimenting with the free trial of all the Practice Management/EHR systems which made your shortlist. Really kick the tires on them (using fake client information, of course) and get an idea of how you like or don’t like the way they work.

As you work on choosing your Practice Management/EHR system, remember that you don’t have to use *all* of its Functions. It’s common to use some separate standalone services, in addition to the Practice Management/EHR system, which perform their speciality Functions especially well. You do get more bang for your buck, however, the more you can comfortably leverage your Practice Management/EHR system to fill out the Services Recipe Function List.

When you’ve chosen the right Practice Management/EHR system for your practice and you feel good about it, move to step B.

B) Get out the Practice Management/EHR Functions Template Card (you can find it below in the Service Type Template Cards section of this workbook), and then choose which of those Functions on the template card that your chosen Practice Management/EHR system fills and that you *desire to use it for*.

Use the Template Card to make a Specific Service Card for the Practice Management/EHR system configuration you chose. Put your chosen Practice Management/EHR system’s name on the card.

When complete, copy and paste your new Specific Service Card into the My Service Cards section of your Worksheet. Then find each Function on the card in your Services Recipe Function List and write the name of the chosen Practice Management/EHR system in the “Service Name” column next to each of those Functions.

## Step 4) (Optional But Strongly Encouraged) Choose Your Business Software Service

When you look at the Specific Service Cards for Business Software, you’ll see that we list exactly two options:

1. Google Workspace (vastly preferred)
2. Microsoft 365 (if you really want it)

Both services will execute HIPAA Business Associate Agreements and can be used to handle client information (be sure you watch the presentation that goes with this workbook to understand how conventional email fits into a HIPAA-compliant practice, though!)

The Person Centered Tech Way is to very strongly recommend Google Workspace, *especially* for group practices. It is much less expensive and easier to use than Microsoft 365, in our opinion. Both can fill a huge range of needed functions on your Services Recipe Function List, however.

Whichever one you pick, decide which of its available Functions you wish to use it for. Also, take a look at the pricing for each service to determine what you would pay to get the Functions you want out of it. When you decide not to use a Function listed on the service’s card, eliminate that Function from the card.

|  |
| --- |
| Copy and paste your modified Google Workspace or Microsoft 365 card into the My Service Cards section of your Worksheet. Then find each Function on the card in your Services Recipe Function List and write the name of the chosen Business Software service in the “Service Name” column. |

## Step 5) Pick Specific Service Cards To Complete Your Recipe

In this step, simply choose specific service cards for the services you’re interested in to fill the remaining Functions on your Services Recipe Function List. When you choose a card, copy it out of this workbook and paste it into your Worksheet under the My Service Cards section.

After you paste in a card, read through all the Functions it provides. If you don’t wish to use this service for any of the listed Functions, eliminate them on the card. Find each non-eliminated Function in your Services Recipe Function List and write the name of the service in the “Service Name” column. Add any notes you find useful in the “Notes” column.

|  |
| --- |
| If you remove a card from the My Service Cards section, be sure to also remove that card’s service name from the Services Recipe Function List.When the Services Recipe Function List is completely filled out, by a combination of service names and eliminated Functions, go to the next step. |

## Step 6) Fill Out the Workforce Members’ Personally-Owned Service Functions Table

If you don’t wish to allow any of the Functions in this table to be filled by team members’ personally-owned services, note as such in this table. For the ones you do wish to permit, make any notes you need in the table.

The few Functions which may be safely filled by team members using personally-owned services are clearly marked in the Big List of Functions.

## Step 7) Fill Out Your My Services List

Find the My Services List table in the Worksheet. Write the names of all your services into the table. Then, visit each service’s pricing page and figure out the monthly cost per user of that service when you use it for all the features you need. Then figure the total estimated cost per month for all your team members who would use the service. Write your desired service tier in the “Service Tier” column, the cost/user in the “$/user/mo.” column, and the overall monthly cost in the “Subtotal $/mo.” column.

|  |
| --- |
| **Very Important Note:** Some services will only provide HIPAA Business Associate Agreements on certain service tiers. Make sure that the service tier you choose is one that will include the BAA.  |

Add the costs up and write the total in the “Total Cost $/mo.” box at the bottom of the table.

## Step 8) Review and Revise

Look over your Worksheet and decide if the recipe written on it will work for your team and your practice. Go back to the previous steps and revise as you need or desire.

**Tip:** If you want to try out different recipes side-by-side, simply make another copy of the Worksheet and fill it in with an alternative recipe. Then compare the Worksheets side-by-side.

Some things to consider when deciding if a recipe works for you:

* **Is the cost right for your budget?** Sometimes it’s hard to avoid breaking your budget in order to meet needs, but cost is a very important consideration! Remember that if you need to bring down the total cost, maybe you can do so by eliminating non-essential Functions from your Services Recipe Function List.
* **Will your team feel comfortable transitioning between the different services on your list?** Imagine a day, or week, of using the services you chose. Imagine performing your practice management and client services using these services. Do you envision any snags in your team’s workflow? Any inefficiencies? You can’t always eliminate snags, but you certainly want to minimize them.
	+ **Very Important Note:** If your imagined workflow ever requires a team member to manually copy client-identifying information from one service to another, be sure you are comfortable relying on them to do that in a way that protects client confidentiality. I.e. Be sure you’re comfortable with the diligence necessary to *not* accidentally paste client information into the wrong place, and *don’t* use non-HIPAA-friendly connector services (e.g. Zapier) to perform the copying automatically.
* **Do you have too many services?** Getting just the right number of services can be a challenge, but there is such a thing as going overboard. Make sure that the more services you have, the better each service performs its particular functions for you.

## Final Step: Step 9) Cover Your BAA Needs

If you are already signed up for any of the services on your list, go find out when you executed your Business Associate Agreement with that service and write it in the BAA Executed Date column of the My Services List. Alternatively, if you don’t need a BAA for that service, provide a brief explanation as to why in the same column.

As you sign up for services and start to adopt them in your practice, record the date of execution for your BAAs in the My Services List table (or the reason why a BAA is unnecessary.)

Enjoy your new practice services combo!



Service Selection Cards

Now to the nitty gritty. This part of the Workbook contains a big repository of information about Functions, Service Types, and Specific Services. Follow the Instructions (listed above) to build your service selection recipe The Person Centered Tech Way!

# The Big List of Functions

This table complements the Services Recipe Function List on your Worksheet. When you’re not sure what a Function listed there is about, just check its description on this list.

# Services Recipe Function List

|  |  |
| --- | --- |
| **Function** | **What That Is** |
| Record-Keeping | The ability to write and maintain client records, including the maintenance of client demographic info and progress notes. Some systems are very sophisticated in this area and others may be more simple.  |
| Payment Processing | The ability to charge credit cards, debit cards, and often HSA or FSA cards to pay copays and/or session fees. Generally also includes the ability to provide payment receipts. |
| Invoicing | The ability to send payment invoices to clients and track which invoices were paid and which weren’t. Generally also includes the ability to provide payment receipts. |
| Billing (if not done by workforce) | The ability to submit claims to 3rd-party payers for reimbursement for services.  |
| Inbound Voice Calling | The ability to receive voice phone calls. |
| Outbound Voice Calling | The ability to initiate voice phone calls. |
| Conventional (SMS) Texting | The ability to send and receive conventional (SMS or MMS) text messages. Note that SMS/MMS text messages are inherently non-secure. See the presentation which accompanies this workbook for more information on how to use them in a HIPAA-friendly manner. |
| Secure Texting/Mobile Messaging | The ability to send and receive *secured* messages through an app or web page. Note that secure texting/mobile messaging services generally require you and your clients to download an app (or use a web app) specifically made for the service.  |
| Conventional Email | The ability to send and receive conventional emails. Note that conventional emails are inherently unable to guarantee security. See the presentation which accompanies this workbook for more information on how to use them in a HIPAA-friendly manner. |
| Secure Email | The ability to send and receive *secured* emails. See the presentation which accompanies this workbook for more information on exactly what that means.  |
| FAX | The ability to send and receive electronic FAXes. (Yes, FAX is still a thing.) |
| Appointment Scheduling | The ability for team members to schedule appointments for clinicians in the practice. |
| Client Self-Scheduling | The ability for clients to visit an online portal (or possibly a special app on their phone) and self-schedule their appointments with you.  |
| Appointment Reminders | The ability to automate (or manually perform) appointment reminders for clients. These are typically sent by conventional SMS/MMS text, conventional email, or automated phone call. See the presentation which accompanies this workbook for more information on how to use conventional texts and emails in a HIPAA-friendly manner. |
| Appointment Calendar | The ability to maintain a calendar of appointments that contains client-identifying information. See the presentation which accompanies this workbook for more information on exactly what that means. |
| Intake Forms | The ability to provide secure online forms, through a web page or special app, that clients can use to complete their intake forms over the Internet. |
| Electronic Signatures for Online Forms | The ability to collect authenticated electronic signatures for online forms. There are a couple ways that electronic signatures can be authenticated, so see the presentation which accompanies this workbook for more information.  |
| Contact Form on Website | The ability to provide a secure contact form directly in your website, which is suitable for collecting client-identifying information from visitors. See the presentation which accompanies this workbook for more information on how that works. |
| Videoconferencing (i.e. for online therapy) | The ability to engage in a video call with a client(s) or colleagues and engage in therapy sessions and/or discuss client-identifying information. |
| Telehealth Waiting Room | The ability to set up a virtual “waiting room” where anyone looking to join a video session with you will be held until you approve their entry to the video session. Different services provide more or less sophisticated waiting room experiences. |
| Telehealth Whiteboard | The ability to draw/write on a shared virtual canvas during a video call with therapy clients or while discussing a client case. |
| Telehealth Breakout Room | The ability to send groups of people in a video call into breakout rooms, where they can converse with each other separately from the rest of the people on the call.  |
| Telehealth Video Recording | The ability to record telehealth sessions within a telehealth app (i.e. as opposed to recording the session using screen capture software on your own computer/tablet/smartphone.) |
| Telehealth Group/Family Meetings | The ability to engage in a quality video call with more than 2 people.  |
| E-Prescribing | The ability to e-prescribe medications. |
| Office Software (i.e. Writing Documents and Spreadsheets) | The ability to write documents, use spreadsheets, and/or make slide presentations in a cloud-based app or web page.  |
| Internal Team Communication | The ability for team members to communicate and collaborate for operational and task management/ coordination in a dedicated workspace environment or channel. |
| Web Hosting | The ability to host a website for promoting your practice and for communicating useful information to clients and the public. Note that web hosting services generally do not engage in HIPAA Business Associate Agreements. However, so long as you do not use any features that cause the web hosting company to receive any client-identifying information, a BAA is also not necessary. Many hosting companies will also offer conventional email service without the all-important BAA. For more information, see this course: <https://personcenteredtech.com/courses/webpresence012019/>  |
| Practice Internet Connection | The ability to connect your computer/tablet/smartphone to the Internet. Note that the basic function of providing an Internet connection does not require executing a Business Associate Agreement with the service provider. Any other services bundled with the basic Internet connection would require a BAA to be used in conjunction with client-identifying information.This function can safely be provided through team members’ personally-owned services. However, there are device security considerations around WiFi setups and other home Internet/Bring-Your-Own-Device considerations that are outside the scope of this workbook. For more information, see this course: <https://personcenteredtech.com/courses/teletherapymobile2020/>  |
| VPN (Virtual Private Network) | The ability to protect your computer’s/tablet’s/smartphone’s network connections from intrusion. VPN services allow you to connect the protected device to otherwise-unknown/untrusted Internet connections. Note that, in our opinion and that of other experts with whom we have consulted, the basic function of providing a VPN connection does not require executing a Business Associate Agreement with the VPN service provider.This function can safely be provided through team members’ personally-owned services.  |
| Password Management | The ability to create and store strong passwords in a virtual “vault” so that you can have strong and unique passwords on every site and app you use -- without having to memorize any of them.Note that even though password management services hold your important passwords, they do not directly hold PHI. So as long as you don’t enter any client-identifying information into your password manager (and there’s no reason to do so), you do not need a BAA with the password manager service provider. This function can safely be provided through team members’ personally-owned services. However, the practice will need to provide the password management functionality if you wish to leverage a Password Management Shared Vaults Function. |
| Password Management Shared Vaults | The ability to share a set of selected passwords with your team using a virtual vault. Requires that the practice supply password management functionality to the team. |
| Cloud Data Backup | The ability to back up data from your computer/tablet/smartphone to an online service. This function can vary greatly in terms of sophistication from service-to-service.  |
| CRM ( Customer Relationship Manager) | The ability to manage, analyze and track customer/prospective data and interactions. CRMs typically also offer team communication and task management and automation functionalities. CRMs generally rely on being integrated with your organization’s email service, as well as additional primary communication services.Note that a HIPAA BAA is necessary for a CRM (or any third party service) that handles or has access to/is integrated with another service that contains client and prospective client data/Protected Health Information. See the presentation which accompanies this workbook for more information.  |
| Email/Marketing Newsletter (e.g. MailChimp, Constant Contact, Keap) | The ability to send email marketing/newsletters to a mass email list of subscribers. **Note:** There are a number of considerations with regards to HIPAA compliance when using email marketing. For more information, see our presentation by Eric Strom, JD PhD LMHC on email marketing and HIPAA. It is pay-what-you-can, so it is accessible to all: <https://personcenteredtech.com/product/jun2020conf-practcare-wholetrack/>  |
| Directory Profiles | The ability to advertise your practice in an online therapist directory with strong Web presence and SEO. E.g. Psychology Today, GoodTherapy.org, and TherapyDen. Note that the basic function of providing an online profile for your practice does not necessitate a Business Associate Agreement with the service provider. However, these services typically offer initial contact services that do necessitate the use of a Business Associate Agreement. See the presentation which accompanies this workbook for more information on how to work with that. |
| Accounting (if not done by workforce) | The ability to track incomes and expenses for various purposes.Note that if you enter client-identifying info into an online accounting software service (e.g. Quickbooks Online), then a Business Associate Agreement with the service provider becomes necessary (note that Quickbooks Online does **not** do BAAs as of the time of writing.) The same goes for providing client-identifying information to a human accountant. |

# Specific Services

## Practice Management System/EHR Functions

See Step 3 of the Instructions for information about Practice Management System/EHR Service cards.

## Business Software Services

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| [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.Note that Secure Email functionality is not available (we do not consider Gmail’s Confidential Mode to be sufficient for our Secure Email needs. [Learn more here](https://personcenteredtech.com/2019/05/28/gmail-confidential-mode-for-gsuite-a-provisional-review/).) However, it is very common and effective to integrate Google Workspace with LuxSci so you can use LuxSci secure email *inside* your practice’s Gmail.

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Inbound Voice Calling | *Paid version of Google Voice. Costs Extra!* Free Google Voice is **not** covered by BAAs. The paid version is somewhat pricey and low in features. Smartphone app or web app only. |
| Outbound Voice Calling | *Paid version of Google Voice. Costs Extra!* Free Google Voice is **not** covered by BAAs. The paid version is somewhat pricey and low in features. Smartphone app or web app only. |
| Conventional Email | Gmail |
| Conventional (SMS) Texting | *Paid version of Google Voice. Costs Extra!* Free Google Voice is **not** covered by BAAs and low in features. Smartphone app or web app only. |
| Appointment Calendar | Google Calendar. |
| Intake Forms | Google Forms. Cannot be styled to match your website or brand. Cannot accept e-signatures. Cannot embed Google Forms that contain file upload/attachment field. |
| Videoconferencing (i.e. for online therapy) | Google Meet |
| Contact Form on Website | Google Forms. Cannot be styled to match your website or brand.  |
| Office Software (i.e. Writing Documents and Spreadsheets) | Google Docs, Sheets, Slides + Google Drive. |
| Internal Team Communication | Google Chat |
| Cloud Data Backup | Google Drive. For simple needs only |

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| [MS 365](https://www.microsoft.com/en-us/microsoft-365/compare-microsoft-365-enterprise-plans)Microsoft’s business software offering. Provides a wide variety of services and will enter into a Business Associate Agreement to cover those services.

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Inbound Voice Calling | MS 365 Business Voice. Costs extra, and is relatively expensive and complicated to set up.  |
| Outbound Voice Calling | MS 365 Business Voice. Costs extra, and is relatively expensive and complicated to set up.  |
| Conventional Email | Outlook |
| Secure Email | Office 365 Message Encryption, which is available in conjunction with Azure Rights Management. Requires at least the E3 service tier. Difficult to set up, but works fine after that. |
| Appointment Calendar | MS Office 365 Calendar. |
| Intake Forms | MS Forms. Cannot be styled to match your website or brand. Cannot accept e-signatures |
| Videoconferencing (i.e. for online therapy) | Teams |
| Contact Form on Website | MS Forms. Cannot be styled to match your website or brand. Cannot accept e-signatures  |
| Office Software (i.e. Writing Documents and Spreadsheets) | Office 365 Word, Excel, Powerpoint (Also Access if you are using a PC) |
| Online Forms & Initial Contact | MS Forms. Cannot be styled to match your website or brand. Cannot accept e-signatures |
| Internal Team Communication | Teams (chat)  |
| Cloud Data Backup | One Drive. For simple needs only |

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## Standalone Payment Services

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| [Square](https://squareup.com/us/en/payments)HIPAA Business Associate Agreement (BAA) included in TOS for HIPAA-covered entities. Competitive card processing fees. Can be used for “point-of-sale” card swiping; or, take payment remotely, without card present.

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| **Function** | **Notes** |
| Payment Processing | Can hold payment card info on file through the invoicing feature |
| Invoicing |  |

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| [Stripe](https://stripe.com/pricing)We include Stripe here only so you know that we give it a thumbs up for your payment processing. You do not use Stripe directly. You use it as an integration/add-on for your Practice Management System/EHR, Calendar service, or other services which can handle payments and hold credit/debit cards on file for you. It’s very popular, and it meets our needs.

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| **Function** | **Notes** |
| Payment Processing | Not used directly. Stripe acts as an add-on for your other services that allows them to handle payment cards for you. |

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## Phone Services

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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 | Doesn’t support desk phones -- only works as a smartphone app or web app |
| Outbound Voice Calling | Doesn’t support desk phones -- only works as a smartphone app or web app |
| Conventional (SMS) Texting |  |
| FAX |  |
| Secure Texting/Mobile Messaging | Client needs to download an app (free) |

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| [RingRx](https://ringrx.com/pricing/)More expensive than iPlum, but also has much more robust-and-ready support. Can work with VoIP-ready desktop phones as well as phone app and web app.

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Inbound Voice Calling |  |
| Outbound Voice Calling |  |
| Conventional (SMS) Texting | Only available on the Grow or Clinic Plans. Can be disabled if your risk management strategy is to avoid conventional SMS text.  |
| FAX |  |

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| [SpruceHealth](https://www.sprucehealth.com/plans)SpruceHealth was one of the first HIPAA-friendly VoIP services designed for healthcare providers. It is feature rich, and includes additional functionality beyond the “classic” VoIP services -- a teletherapy video platform, treatment plan collaboration, bulk messaging, and more. Its price-point is higher than the other included phone services in this workbook, but practices that will utilize the video platform as their primary platform for teletherapy often find it translates to cost-savings depending on the other ingredients in their practice services recipe.

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Inbound Voice Calling | Supports deskphones, but only on Communicator Tier. |
| Outbound Voice Calling | Supports deskphones, but only on Communicator Tier. |
| Conventional (SMS) Texting |  |
| FAX |  |
| Secure Texting/Mobile Messaging | Client needs to download an app |
| Videoconferencing-for-Telehealth | Client must create a (free) Spruce account |

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## Secure Email Services

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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 |  |
| Secure Email |  |

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| [Hushmail for Healthcare](http://hushmail.com/personcenteredtech)Secure (and conventional) email service that includes secure forms and e-signatures from a company with high trustability and strong security culture. Does not integrate with Google Workspace Gmail or Microsoft Office 365 email, however. Does not offer forced-TLS with default to escrow style secure email, which means secure emails are sent only as escrow style emails (more rigermoral in terms of user experience for email recipients than forced-TLS with default to escrow.) Affordability + robust secure form functionality make this service a strong option for practices that utilize secure communication functionality from another service as their primary secure communications mode -- e.g. secure messaging in practice management/EHR system or VoIP phone system -- but need/want to supplement that functionality with an additional option for secure communication.Hushmail sponsors Person Centered Tech’s articles and emails. You can read our writeup about them and get a lifetime 15% discount here: <https://personcenteredtech.com/hushmail-for-healthcare-review/>

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Conventional Email |  |
| Secure Email |  |
| Contact Form on Website |  |
| Intake Forms |  |
| Electronic Signatures for Online Forms |  |

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## Appointment Scheduling Services

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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  | Integrates with Square, Stripe (commonly used by practice management/EHR systems) or PayPal |

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| [Yellow Schedule](https://www.yellowschedule.com/pricing/)More economical but slightly less robust appointment scheduling service than Acuity Scheduling. If utilizing for payment processing, note that it can only be used with Stripe.

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Appointment Scheduling |  |
| Client Self-Scheduling |  |
| Appointment Reminders |  |
| Appointment Calendar |  |
| Payment Processing  | Integrates with Stripe (commonly used by practice management/EHR systems) |

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## Online Forms Services

**Special note:** Hushmail for Healthcare also provides extensive forms functionality. It is listed under Secure Email Services, however. Be sure to consider Hushmail for Healthcare as a possibility when looking for secure Online Forms functionality.

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| [IntakeQ](https://intakeq.com/pricing) Feature-rich form service designed specifically for healthcare professionals. Popular choice for practices that find the form functionality in their practice management/EHR system is too anemic and need to supplement it with an additional service (a presently very common need for group practices.)

|  |  |
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| **Function** | **Notes** |
| Intake Forms |  |
| Electronic Signatures for Online Forms | Allows multi-party signing, for provider and client |
| Contact Form on Website |  |

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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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| [Cognito Forms](https://www.cognitoforms.com/pricing)Enterprise tier plan required for HIPAA BAA.

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

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| [Jotform](https://www.jotform.com/pricing/)Silver or Gold plan tier required for HIPAA BAA.

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

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| [Formsite](https://www.formsite.com/pricing/) Enterprise plan tier required for HIPAA BAA. Expensive, but very robust. Due to cost, it is best suited for larger group practices with multiple providers, locations, and extensive form needs.

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

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## Videoconferencing-for-Telehealth Services

Note that several Practice Management Systems/EHR services, and both Google Workspace and Microsoft 365, supply videoconferencing functionality which is suitable for telehealth. You do need a backup in case your main service fails, however. Also, you may just not like how any of those services does the job!

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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) |  |
| Secure Texting/Mobile Messaging | Client needs to download an app |
| Appointment Scheduling |  |
| Appointment Reminders |  |
| Appointment Calendar |  |
| Telehealth Waiting Room |  |
| Telehealth Group/Family Meetings | **Limited:** Up to 4 separate participants |

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| [VidHealth](https://vidhealth.com/pricing)Vidhealth is a high quality webRTC-based platform (doesn’t require client download) that provides basic teletherapy functionality.

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| --- | --- |
| **Function** | **Notes** |
| Videoconferencing (i.e. for online therapy) |  |
| Appointment Calendar |  |
| Telehealth Waiting Room |  |
| Telehealth Group/Family Meetings |  |

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## Password Management Services

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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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| --- | --- | --- | --- | --- | --- | --- |
| [Dashlane](https://www.dashlane.com/business/pricing)

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

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| --- | --- | --- | --- | --- | --- | --- |
| [LastPass](https://www.lastpass.com/products/team-password-manager)

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

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## Web Hosting

Web hosting is a huge industry with a lot of people vying for your money. It can be really hard to choose *your* best way to get a website built.

Well, we aren’t going to do much to help with that decision here (sorry.) But we will refer you to some great blogs from Kat Love that might help:

* [What Is The Best Website Platform For Therapists?](https://empathysites.com/what-is-the-best-website-platform-for-therapists/)
* [Q&A: Is $4500 too much for a website?](https://empathysites.com/qa-is-4500-too-much-for-a-website/)

**Important Note:** Web hosting services generally do not engage in HIPAA Business Associate Agreements. However, so long as you do not use any features that cause the web hosting company to receive any client-identifying information, a BAA is also not necessary. Many hosting companies will also offer conventional email service without the all-important BAA. For more information, see this course: <https://personcenteredtech.com/courses/webpresence012019/>

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| [Brighter Vision](https://www.brightervision.com/websites/)Brighter Vision is a reseller for Hushmail for Healthcare. You may find this integration useful. Note, however, that you can acquire Hushmail for Healthcare service separately and at a discount through Hushmail’s sponsorship of Person Centered Tech’s articles and newsletters: <https://personcenteredtech.com/hushmail-for-healthcare-review/>

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

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

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

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| [Wix](https://www.wix.com/upgrade/website)

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

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| --- | --- | --- | --- | --- |
| [Wordpress.com](https://wordpress.com/pricing/)

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

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| Your Web Designer’s Hosting ServiceQuite frequently, the best option for a practice is to hire a designer to make their website. Sometimes, that designer also hosts the website. This works fine for our needs. Just remember to remind your designer that the website cannot be made to directly accept information submitted by the user and you can’t use conventional email without a BAA. For more information, see this course: <https://personcenteredtech.com/courses/webpresence012019/>

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

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| Website Hosting Service: <Name of Service>Making your own website? Then you’re probably using one of many shared hosting services such as SiteGround, HostGator, or a bazillion others. Or perhaps you have a more sophisticated setup. All of these are fine for our needs (so long as you find them to work fine for you.) If you choose to host your own site, simply copy this card into your Worksheet and put the name of your hosting service where it says: <Name of Service>Remember not to make your website so that it directly accepts information submitted by the user, and don’t use associated conventional email services without a BAA. For more information, see this course: <https://personcenteredtech.com/courses/webpresence012019/>

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

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## Practice Internet Connection Services

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| Local Internet Service: <Name of Your Service Provider>There are so many local Internet Service Providers in the world, that it makes no sense to try to list them all here. Also, from our perspective, they are largely the same. So when you choose a card for your practice’s Internet Service Provider, just use this one and fill in the name of your provider where it says <Name of Your Service Provider>. For the basic Function of supplying a Practice Internet Connection, the service provider does not need to execute a Business Associate Agreement with your practice. Note that most such providers may also supply other functionality, such as conventional email. Those other services (e.g. conventional email) would require a Business Associate Agreement to be used for your practice. Local Internet Service Providers generally don’t execute BAAs, so we don’t list here any of the other Functions they may provide.It is also acceptable for team members to use their personally-owned Internet service for practice business, so long as they take certain security precautions. For more information, see this course: <https://personcenteredtech.com/courses/teletherapymobile2020/>

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

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| --- | --- | --- | --- | --- |
| Cellular Data Service: <Name of Your Phone Service Provider>Nearly every cellular phone company offers cellular data service of some kind. Using a phone’s cellular data, whether directly on the phone or by setting up a smartphone hotspot, is actually a good way (in our opinion) to get a sufficiently private Internet connection for devices used in the practice. So when you choose a card to represent using cellular data for the Practice Internet Connection Function, just use this one and fill in the name of your phone service where it says <Name of Your Phone Service Provider>. For the basic Function of supplying a Practice Internet Connection, the service provider does not need to execute a Business Associate Agreement with your practice.It is also acceptable for team members to use the cellular data on their personal phone service for practice business.

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

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## VPN Services

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| [TunnelBear](https://www.tunnelbear.com/teams)Easy to install and configure. Team plan makes it efficient to set up service for all workforce the practice is providing VPN service for. TunnelBear doesn’t have as many servers as NordVPN, meaning the speed impact of using a VPN can be greater with TunnelBear. Each user account on TunnelBear provides VPN service for 5 simultaneously connected devices, so a user account is not required to provide for each device that requires a VPN. TunnelBear is more economical than NordVPN for those who want a monthly billing option.

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

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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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## E-FAX Services

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| --- | --- | --- | --- | --- |
| [SRFax](https://www.srfax.com/fax-plans/healthcare-solutions/)Competitively priced HIPAA-appropriate e-FAX service that has a better designed and easier to navigate user interface, when compared to the majority of standalone FAX services.

|  |  |
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| **Function** | **Notes** |
| FAX |  |

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| [Faxage](https://www.faxage.com/pricing.php)HIPAA BAA available on all plan tiers, making Faxage a good HIPAA-appropriate standalone e-FAX service that scales to usage needs affordably.

|  |  |
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| **Function** | **Notes** |
| FAX |  |

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## E-Prescribing Standalone Services

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| [ChARM](https://www.charmhealth.com/ehr/ehr-pricing.html#e-rx-epcs)Charm offers both e-prescribing and e-prescribing of controlled substances as add-ons to their free or per-encounter priced plan tiers, which makes it an affordable and scalable e-prescribing service for practices that need e-prescribing, but don’t need it for all their providers or who don’t want their practice management/EHR selection to be based off of the necessity of e-prescribing functionality being included (e.g. want to use a therapy oriented practice management system that doesn’t include e-prescribing.)

|  |  |
| --- | --- |
| **Function** | **Notes** |
| E-Prescribing |  |

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## Email Marketing Newsletter Services

We do not necessarily recommend these as the best email marketing services possibly available, but they do execute HIPAA BAAs so we're including these options for you to make a selection. At the time of writing, there is no "killer app" or killer service for HIPAA-friendly email marketing newsletter services.

**Note:** There are a number of considerations with regards to HIPAA compliance when using email marketing. For more information, see our presentation by Eric Strom, JD PhD LMHC on email marketing and HIPAA. It is pay-what-you-can, so it is accessible to all: <https://personcenteredtech.com/product/jun2020conf-practcare-wholetrack/>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| [Constant Contact](https://www.constantcontact.com/email-marketing)

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Email marketing/newsletter | [Constant Contact will execute a BAA and do not require a specific plan tier](https://knowledgebase.constantcontact.com/articles/KnowledgeBase/6240-business-association-agreements?lang=en_US). They rightly provide guidance that the user also has responsibilities for ensuring their use of email marketing newsletters meets their HIPAA compliance requirements.  |

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| [Keap](https://keap.com/pricing)Formerly Infusionsoft. Configuring complex campaign sequences and automations can be very involved, and -- when PCT last used it -- bug prone, requiring extensive support. However, for the less complex needs of most group practices it generally works well for single email campaign sends.

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Email marketing/newsletter | Keap [will execute a BAA and do not require a specific plan tier](https://knowledgebase.constantcontact.com/articles/KnowledgeBase/6240-business-association-agreements?lang=en_US). They rightly provide [guidance](https://help.keap.com/help/hipaa-security-controls) that the user also has responsibilities for ensuring their use of email marketing newsletters meets their HIPAA compliance requirements.  |

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## Directory Profiles

Popular directory profile services are Psychology Today, GoodTherapy.org, TherapyDen, and a host of others.

From our perspective here, directory sites are largely the same (in reality, they have some very significant differences -- it’s just that those differences don’t impact this process very much.) So when you choose cards for the directory sites you use, just copy the one below as many times as needed and fill in the name of each directory where it says <Name of Service>.

Note that the basic function of providing an online profile for your practice does not necessitate a Business Associate Agreement with the service provider. However, these services typically offer initial contact services that do necessitate the use of a Business Associate Agreement. See the presentation which accompanies this workbook for more information on how to work with that.

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| --- | --- | --- | --- | --- |
| Directory Profile Service: <Name of Service>

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| --- | --- |
| **Function** | **Notes** |
| Directory Profiles |  |

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## CRM Services

There is not a particular service that PCT enthusiastically recommends that does Business Associate Agreements and is economical for group practices for this function, but we're including these options as they perform the function(s) and will execute a HIPAA BAA. CRMs designed for the healthcare industry tend to be oriented to large organizations and hospitals, and are priced accordingly.

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| [Keap](https://keap.com/pricing)Formerly InfusionSoft.

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| **Function** | **Notes** |
| CRM | Keap [will execute a BAA and do not require a specific plan tier](https://knowledgebase.constantcontact.com/articles/KnowledgeBase/6240-business-association-agreements?lang=en_US). Keap can integrate into Google Workspace Gmail to perform CRM functionality. |

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## Internal Team Communication Services

**Note:** Google Workspace and Microsoft 365 both offer simple team communication functionality.

**Another Note:** Slack is the world’s “killer app” for team communication (and it’s great!), but they will not enter into Business Associate Agreements. Thus, your team could not say anything client-identifying in a Slack channel. Thus, we do not list it here.

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| [DockHealth](https://www.dock.health/pricing-product)DockHealth is a very robust HIPAA-friendly internal team communication service that includes task management, tracking, and its ability to incorporate emails from your practice email into the task flow makes it function like a lite CRM -- all covered by a HIPAA BAA.

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| **Function** | **Notes** |
| Internal Team Communication |  |

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## Accounting Services

Finding a HIPAA-appropriate cloud-based SaaS accounting service is nigh impossible, with QuickBooks dominating the user-land accounting software space. Many group practice owners will manage accounting either internally or via a human-managed/provided service; one popular group practice accounting service is [GreenOak Accounting](https://www.greenoakaccounting.com/). GreenOak Accounting offers the utilization of QuickBooks Online as a package option and helps their customers setup and leverage it in a HIPAA-copacetic manner. If you don’t want to manage accounting internally, or rely entirely on human-managed/provided services, GreenOak Accounting may be worth considering.

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| [QuickBooks Online](https://quickbooks.intuit.com/oa/online/)Quickbooks is the ubiquitous accounting software. Unfortunately, the makers of QuickBooks will not execute a HIPAA BAA, which means that many of its helpful functions cannot be utilized as QuickBooks can only be used for practice accounting if it does not contain or have access to systems containing PHI. Auto-syncing and exporting data from the practice banking account, and issuing refunds or invoices through QuickBooks are activities that can bring PHI into QuickBooks which break its HIPAA-appropriateness. QuickBooks can be used in a HIPAA-friendly way, but users must be mindful and diligent about keeping all PHI out of QuickBooks.

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| **Function** | **Notes** |
| Accounting |  |

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# Service Type Template Cards

Following are template cards for various services. If you find a service you’re interested in, and we don’t have a card for it, pick an appropriate template card below to make your own custom service card.

You’ll notice that most of the template cards have highlighted rows. Highlighted rows are Functions which that type of service sometimes provides and sometimes doesn’t.

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| Practice Management System/EHR Functions

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| --- | --- |
| **Function** | **Notes** |
| Record-Keeping |  |
| Payment Processing |  |
| Invoicing |  |
| Billing |  |
| Secure Email | Done through client portal, so only current clients can use.Client **may** need to download an app |
| Secure Texting/Mobile Messaging | Done through client portal, so only current clients can use.Client needs to download an app |
| Client Self-Scheduling |  |
| Appointment Scheduling |  |
| Appointment Reminders |  |
| Appointment 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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| Business Software Functions

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| --- | --- |
| **Function** | **Notes** |
| Record-Keeping |  |
| Cloud Data Backup |  |
| Inbound Voice Calling |  |
| Outbound Voice Calling |  |
| Conventional (SMS) Texting |  |
| Conventional Email |  |
| Secure Email |  |
| Appointment Calendar |  |
| 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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| Phone Service Functions

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| **Function** | **Notes** |
| Inbound Voice Calling |  |
| Outbound Voice Calling |  |
| Conventional (SMS) Texting |  |
| Secure Texting/Mobile Messaging | Client needs to download an app |
| FAX |  |
| Work Internet Connection |  |

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| Secure Email Service Functions

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| --- | --- |
| **Function** | **Notes** |
| Conventional Email |  |
| Secure Email |  |
| Secure Texting/Mobile Messaging | Client needs to download an app |
| Intake Forms |  |
| Contact Form on Website |  |

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| Videoconferencing-for-Telehealth Platform Service Functions

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| --- | --- |
| **Function** | **Notes** |
| Videoconferencing (i.e. for online therapy) |  |
| Secure Texting/Mobile Messaging | Client needs to download an app |
| Appointment Scheduling |  |
| Appointment Reminders |  |
| Appointment Calendar |  |
| Telehealth Waiting Room |  |
| Telehealth Whiteboard |  |
| Telehealth Breakout Room |  |
| Telehealth Video Recording |  |
| Telehealth Group/Family Meetings |  |

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| Payment Service Functions

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| **Function** | **Notes** |
| Payment Processing |  |
| Invoicing |  |

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| Conventional Email Standalone Service FunctionsBesides Google and Microsoft, it is hard to find a conventional email service provider that will execute a HIPAA Business Associate Agreement with practices. Generally, conventional email providers that will do BAAs are also *secure* email providers.

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| **Function** | **Notes** |
| Conventional Email |  |

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| Secure Texting/Mobile Messaging Service FunctionsGenerally, clients and therapists both need to download an app or use a Web app for this Function to work.

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| **Function** | **Notes** |
| Secure Texting/Mobile Messaging |  |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Online Forms Service Functions

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

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| Scheduling/Appointment Standalone Service Functions

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| --- | --- |
| **Function** | **Notes** |
| Appointment Scheduling |  |
| Client Self-Scheduling |  |
| Appointment Reminders |  |
| Appointment Calendar |  |
| Payment Processing  |  |

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| E-Prescribing Standalone Service Functions

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| --- | --- |
| **Function** | **Notes** |
| E-Prescribing |  |

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| E-FAX Standalone Service Functions

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| **Function** | **Notes** |
| FAX |  |

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| VPN Service FunctionsGenerally, it is acceptable for team members to use a personal VPN service on devices they use for practice business.

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

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| Internet Connection Service FunctionsGenerally, it can be acceptable for team members to use a personal Internet connection service. However, there are device security considerations around WiFi setups and other home Internet/Bring-Your-Own-Device considerations that are outside the scope of this workbook. For more information, see this course: <https://personcenteredtech.com/courses/teletherapymobile2020/>

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

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| Password Management FunctionsGenerally, it can be acceptable for team members to use a personally-owned password management service to store their passwords for practice-owned services. However, the practice will need to provide the password management functionality if you wish to leverage a Password Management Shared Vaults Function.

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

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| Email Marketing Newsletter Functions

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| --- | --- |
| **Function** | **Notes** |
| Email marketing/newsletter |  |

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| Internal Team Communication Functions

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| --- | --- |
| **Function** | **Notes** |
| Internal Team Communication |  |

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| --- | --- | --- | --- | --- |
| CRM Functions

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| --- | --- |
| **Function** | **Notes** |
| CRM |  |

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| --- | --- | --- | --- | --- |
| Accounting Service Functions

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Accounting |  |

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