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Group Service Selection Worksheet

To use this Worksheet, follow the directions in Service Selection The Person Centered Tech Way: Workbook for Group Practices.

# Services Recipe Function List

|  |  |  |
| --- | --- | --- |
| **Function** | **Service Name** | **Notes** |
| Record-Keeping |  |  |
| Payment Processing |  |  |
| Invoicing |  |  |
| Billing (if not done by workforce) |  |  |
| Inbound Voice Calling |  |  |
| Outbound Voice Calling |  |  |
| Conventional (SMS) Texting |  |  |
| Secure Texting/Mobile Messaging |  |  |
| Conventional Email |  |  |
| Secure Email |  |  |
| FAX |  |  |
| Appointment Scheduling |  |  |
| Client Self-Scheduling |  |  |
| Appointment Reminders |  |  |
| Appointment Calendar |  |  |
| Intake Forms |  |  |
| Electronic Signatures for Online Forms |  |  |
| Contact Form on Website |  |  |
| Instant Messaging/Webchat (e.g. a chat interface on the practice website) |  |  |
| Videoconferencing (i.e. for online therapy) |  |  |
| Telehealth Waiting Room |  |  |
| Telehealth Whiteboard |  |  |
| Telehealth Breakout Room |  |  |
| Telehealth Video Recording |  |  |
| Telehealth Group/Family Meetings |  |  |
| E-Prescribing |  |  |
| Office Software (i.e. Writing Documents and Spreadsheets) |  |  |
| Internal Team Communication |  |  |
| Web Hosting |  |  |
| Practice Internet Connection |  |  |
| VPN (Virtual Private Network) |  |  |
| Password Management |  |  |
| Password Management Shared Vaults |  |  |
| Cloud Data Backup |  |  |
| CRM ( Customer Relationship Manager) |  |  |
| Email/Marketing Newsletter (e.g. MailChimp, Constant Contact, Keap) |  |  |
| Directory Profiles |  |  |
| 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.

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Practice Internet Connection |  |
| VPN (Virtual Private Network) |  |
| Password Management |  |

# My Service Cards

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

# My Services List

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Service Name** | **BAA Executed Date  (Or reason no BAA is needed)** | **Service Tier** | **$/user/mo.** | **Subtotal $/mo.** |
|  |  |  |  |  |
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|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **TOTAL COST $/Mo.** | | | |  |