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Example 1: Solo/+ Service Selection Worksheet

This document is an example of how the Solo/+ Service Selection Worksheet might be completed by a typical solo practice.

# Services Recipe Function List

|  |  |  |
| --- | --- | --- |
| **Function** | **Service Name** | **Notes** |
| Record-Keeping | My Favorite Practice Management System |  |
| Payment Processing | My Favorite Practice Management System |  |
| Invoicing | My Favorite Practice Management System |  |
| Billing  | My Favorite Practice Management System |  |
| Cloud Data Backup | Google Workspace (Drive) |  |
| Inbound Voice Calling | iPlum |  |
| Outbound Voice Calling | iPlum |  |
| Conventional (SMS) Texting | iPlum | Will talk to clients at first session about the request for nonsecure communications, if they want to use conventional texting. Will encourage them to use the secure messaging app instead. |
| Secure Texting/Mobile Messaging | iPlum | Will talk to clients at first session about downloading the app |
| Conventional Email | Google Workspace (Gmail) | Will talk to clients at first session about the request for nonsecure communications, if they want to use conventional email. Will encourage them to use the secure messaging app (iPlum) for general questions/interactions and secure email (practice management system) for sending sensitive documents. |
| Secure Email | My Favorite Practice Management System |  |
| FAX | iPlum |  |
| Client Self-Scheduling |  | I want to be involved in all the scheduling. |
| Appointment Reminders | My Favorite Practice Management System |  |
| Appointment Calendar | My Favorite Practice Management System |  |
| Intake Forms | My Favorite Practice Management System |  |
| Electronic Signatures for Online Forms | My Favorite Practice Management System |  |
| Contact Form on Website |  |  |
| Instant Messaging/Webchat (e.g. a chat interface on the practice website) |  |  |
| Videoconferencing (i.e. for online therapy) | Google Workspace (Meet) | (Backup: My Favorite Practice Management System) |
| Telehealth Waiting Room | Google Workspace (Meet) | (Backup: My Favorite Practice Management System) |
| Telehealth Whiteboard | Google Workspace (Meet) | (Backup: My Favorite Practice Management System) |
| Telehealth Breakout Room | Google Workspace (Meet) | Practice Management System backup cannot do breakout rooms |
| Telehealth Video Recording | Google Workspace (Meet) | Practice Management System backup cannot record sessions |
| Telehealth Group/Family Meetings | Google Workspace (Meet) | (Backup: My Favorite Practice Management System) |
| E-Prescribing |  |  |
| Office Software (i.e. Writing Documents and Spreadsheets) | Google Workspace (Docs + Drive) |  |
| Web Hosting | Squarespace |  |
| Practice Internet Connection | Stephouse + AT&T |  |
| VPN (Virtual Private Network) | NordVPN |  |
| Password Management | Dashlane |  |
| Directory Profiles | Psychology Today, GoodTherapy.org |  |
| Accounting  | Google Workspace (Sheets) |  |

# My Service Cards

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| My Favorite Practice Management System

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Record-Keeping |  |
| Payment Processing | Talk to new clients on the phone about signing up for the client portal |
| Invoicing | Talk to new clients on the phone about signing up for the client portal |
| Billing  |  |
| Secure Email | Talk to new clients on the phone about signing up for the client portal |
| Secure Texting/Mobile Messaging | Will use iPlum, instead |
| Client Self-Scheduling | I don’t want to use this. I will be involved in all the 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 my Google Calendar |
| Intake Forms | Talk to new clients on the phone about signing up for the client portal |
| Electronic Signatures for Online Forms | Talk to new clients on the phone about signing up for the client portal |
| Videoconferencing (i.e. for online therapy) | To be used as a backup in case Google Meet doesn’t work |
| Telehealth Waiting Room | To be used as a backup in case Google Meet doesn’t work |
| Telehealth Whiteboard | To be used as a backup in case Google Meet doesn’t work |
| Telehealth Breakout Room |  |
| Telehealth Video Recording |  |
| Telehealth Group/Family Meetings | To be used as a backup in case Google Meet doesn’t work |
| E-Prescribing |  |
| Other Services for Initial Contact |  |

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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.

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Record-Keeping |  |
| Cloud Data Backup | For backing up letters and other clinical documents that I have on my computer. |
| Inbound Voice Calling |  |
| Outbound Voice Calling |  |
| Conventional Email |  |
| Conventional (SMS) Texting |  |
| 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 | I may not use this, but it’s nice to know I have it available |
| Telehealth Video Recording |  |
| Telehealth Group/Family Meetings |  |
| Contact Form on Website |  |
| Office Software (i.e. Writing Documents and Spreadsheets) |  |

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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 | Will talk to clients at first session about the request for nonsecure communications, if they want to use conventional texting. Will encourage them to use the secure messaging app instead. |
| FAX | Ugh! Will use if I have to. |
| Secure Texting/Mobile Messaging | Will talk to clients at first session about downloading the app |

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

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Password Manager |  |

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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/)

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

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| --- | --- | --- | --- | --- |
| Local Internet Service: Stephouse Home Internet

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| --- | --- |
| **Function** | **Notes** |
| Practice Internet Connection | Shared with home. Will set up WiFi security scheme described in the home office course. Will also use my VPN just to be sure. |

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| --- | --- | --- | --- | --- |
| Cellular Data Service: AT&T

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| **Function** | **Notes** |
| Practice Internet Connection | Will set up a hotspot with my smartphone when I need it. |

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| --- | --- | --- | --- | --- |
| Directory Profile Service: Psychology Today

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

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| --- | --- | --- | --- | --- |
| Directory Profile Service: GoodTherapy.org

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Directory Profiles | I put a note in my profile asking potential clients to contact me through my website and not to use the “email me” or phone calling feature. I am accepting the legal risk that they may use those features anyways and a complaint/data breach could possibly result  |

 |

# My Services List

|  |  |  |  |
| --- | --- | --- | --- |
| **Service Name** | **BAA Executed Date (Or reason no BAA is needed)** | **Service Tier** | **$/mo.** |
| My Favorite Practice Management System | Jan 31st, 2013 | Basic | $60 |
| Google Workspace | Jan 31st, 2013 | Basic | $6 |
| iPlum | Jan 31st, 2013 | Measured Plan + Backup Basic | $8 |
| Dashlane | No PHI is handled. | Free | $0 |
| Squarespace | No PHI is handled. | Personal | $12 |
| Nord VPN | Conduit, no BAA needed. | 1-year plan | $5 |
| Stephouse home Internet | Conduit, no BAA needed. | N/A | $10 (practice’s share of cost) |
| AT&T cellular data for my smartphone hotspot | Conduit, no BAA needed. | N/A | $10 (practice’s share of cost) |
| Psychology Today Profile | I turned off the contact form and phone number routing, so no PHI is handled | N/A | $30 |
| GoodTherapy.org Profile | I put a note in my profile asking potential clients to contact me through my website and not to use the “email me” or phone calling feature. I am accepting the legal risk that they may use those features anyways and a complaint or data breach could possibly result  | Premium | $40 |
| **TOTAL COST $/Mo.** | $181 |