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Example 2: 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 | RingRx |  |
| Outbound Voice Calling | RingRx |  |
| Conventional (SMS) Texting | RingRx | I will have this but avoid it a lot. Will work to get clients using Signal, instead |
| Secure Texting/Mobile Messaging | Signal | 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 (Signal) for general questions/interactions and secure email (Hushmail) for sending sensitive documents. |
| Secure Email | Hushmail for Healthcare |  |
| FAX | RingRx |  |
| 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, Hushmail for Healthcare |  |
| 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 | My Web Designer’s Hosting Service |  |
| Practice Internet Connection | Comcast + Verizon |  |
| VPN (Virtual Private Network) | NordVPN |  |
| Password Management | LastPass |  |
| Directory Profiles | Psychology Today |  |
| Other Services for Initial Contact |  |  |
| Accounting  |  |  |

# 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 |  |
| Client Self-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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| [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 | I will have this but avoid it a lot. Will work to get clients using Signal, instead |
| FAX |  |

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| [Signal](https://personcenteredtech.com/vendorreview/signal/)A free and open source secure texting/mobile messaging app. Signal is free and is very strong on privacy. However, it is a special case when it comes to use by HIPAA covered entities. Please read and fully understand our review of Signal before you opt to use it in your practice: <https://personcenteredtech.com/vendorreview/signal/>

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Secure Texting/Mobile Messaging | Will paste messages from Signal into EHR on my phone whenever I complete a messaging exchange with a client. Will also harden the phone and have Signal make me enter a PIN code when I open it. |

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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 | Will use Gmail |
| Secure Email |  |
| Contact Form on Website |  |
| Intake Forms | Will use My Favorite Practice Management System |

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|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| [LastPass](https://www.lastpass.com/pricing)

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

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| My 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/>

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

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| --- | --- | --- | --- | --- |
| [NordVPN](https://nordvpnteams.com/)

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

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| --- | --- | --- | --- | --- |
| Local Internet Service: Comcast Office Internet

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

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| --- | --- | --- | --- | --- |
| Cellular Data Service: Verizon

|  |  |
| --- | --- |
| **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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# 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 | Solo | $50 |
| Google Workspace | Jan 31st, 2013 | Basic | $6 |
| RingRx | Jan 31st, 2013 | Grow | $19 |
| Signal | Conduit, no BAA needed.Will paste messages from Signal into EHR on my phone whenever I complete a messaging exchange with a client. Will also harden the phone and have Signal make me enter a PIN code when I open it. | N/A | $0 |
| Hushmail for Healthcare | Jan 31st, 2013 | N/A | $17 |
| LastPass | No PHI is handled. | Premium | $3 |
| My Web Designer’s Hosting Service | No PHI is handled. | N/A | $45 |
| Nord VPN | Conduit, no BAA needed. | 1-year plan | $5 |
| Comcast Office Internet | Conduit, no BAA needed. | N/A | $50 |
| Verizon cellular data for my smartphone hotspot | Conduit, no BAA needed. | N/A | $25 (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 |
| **TOTAL COST $/Mo.** | $250 |