

OFFICE ESSENTIALS & NONESSENTIALS

ESSENTIALS

- ☐ EHR system: Not only does this drastically reduce how much time you spend scheduling, doing notes, and billing/accounting, it is a great way to keep track of your clinicians. We use TherapyNotes. Learn more about all the EHR systems here. Want three (3) FREE months of TherapyNotes to try it out? Use the promo code TGPE17.
- ☐ HIPAA compliant email: G-Suite is a great tool for keeping communication via email between you and your clinicians HIPAA compliant (including google docs). Need help understanding HIPAA compliance? Check www.personcenteredtech.com.
- ☐ Virtru: If you will be sending emails to clients about appointment, or if they will be emailing you when there is a problem at home or with their child (as so many parents do), then making sure you reply securely is important. Virtru is a G-Suite add-on that makes sure you can respond to clients securely.
- ☐ Fax line or e-fax
- ☐ Accountant

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NONESSENTIALS

- ☐ Phones: Depending on if you are having clinicians schedule their own appointments or not, it is nice to have a phone system with extensions once you hire clinicians. We use All Call Technologies.
- ☐ Billing person (outsourced or in house): As you grow, and especially if you are taking insurance, this is something that is a savior for group practices.
- ☐ Financial Planner: They can help you make financial goals and be mindful and purposeful with your business money...and personal finances! We use Workable Wealth. See this for more about financial planning.
- ☐ Virtual Assistant: Well worth the money, virtual assistants can take the load away from you. Whether it be for marketing, receptionist, or billing, a virtual assistant can do many things for your practice to take things off your plate.

Need more action oriented help? Check out the Practice Management needs checklist below if you are still on the fence about using EHR or switching.