

You're listening to the Abundant Practice Podcast. Where we work through the stuck places folks hit while building their private practices. Each week we dive into a practice building through different lenses. You'll get trainings, listen in on mini-consultations and conversations with other consultants. Each month there is a niche deep dive where we flush out a niche from a marketing perspective. Plus every now and then we throw in a "Where are they now" episode, and check in on the clinicians who were on before to see how the advice played out. When relevant, the show notes will include a worksheet for you to bring the content into your practice or life. Because I love you listening, but I want you to take action, too.

This podcast is sponsored by the Abundance Party, where for only \$39 a month you get courses on honing your niche and marketing your practice, scripts for the business side of things, monthly trainings, a chance for a one on one with me, and a much more intimate Facebook group. Where I currently respond to every post. You can check that out at Abundanceparty.com. Alright, onto the show.

This Abundance Practice episode is sponsored by the Highly Sensitive Therapist Retreat. Happening this July in beautiful Santa Cruz California. Organized by NEXT Graduate April Snow and Beth Dawson. If you have fewer sessions per week compared to most of your colleagues but still feel exhausted, if you are deeply impacted by your clients and easily overwhelmed by admin tasks, you may be highly sensitive. Highly sensitive therapists have many gifts to offer such as being deeply empathetic and intuitive, but often feel too drained for these gifts to really shine through. This retreat offers both educational workshops and restorative practices to help you create a balanced business and lifestyle, so you can do your best work. With two workshops per day with speakers such as Dr. Elaine Aaron, yoga classes and private rooms for everyone, there will be plenty of space for downtime. If you want to connect with others who understand you and find support to navigate the demands of being a therapist while feeling deeply, check out The Highly Sensitive Therapist retreat at HSTRetreat.com.

Registration is open now, so save your spot before it fills up.

Allison: Welcome to the Abundance Practice Podcast. I'm your host, Allison Puryear of AbundancePracticeBuilding.com. This week, I'm excited to have a mini training for you with Roy Huggins, at personcenteredtech.com and Rob Reinhardt at tameyourpractice.com. you can also go subscribe immediately to their podcast, [Therapy Tech](https://TherapyTech.com), where you can learn all about how to [unknown2:27.2] and this overlap between your practice and the technology we rely on to market, document and communicate with clients. Rob and Roy are doing an hour long training for the Abundance Party members on March 28th . And if you haven't already joined the party, check out abundanceparty.com for access to courses, trainings, a chance for a one on one with me each month and a fantastic community, all for \$39 a month. It's all you need to build your practice at an affordable price. Gentlemen, welcome.

Rob & and Roy: Thanks, thanks for having us. Great to be here, Allison.

Allison: Yay. So I always think of you guys as therapy tech, essentially. You guys know so much about what we need to do and what we need to not do. So, I wanted to run some questions by you that I know I see a ton, that I don't have the expertise to answer in the ways that you guys do.

Rob or Roy: I know where this is going.

Allison: Probably so. The first one I get all the time is what phone system should I use? Should I use my phone, should I use Google voice? Is there a nice fancy one out there I can pay for? What's the answer?

Roy: Well, when Rob and I talk to each other, we actually just use a can with a string that we stretch across the...

Rob: really really long string.

Allison: Yeah, Oregon to North Carolina is not a short trip.

Rob: And people are amazed at the quality of our podcast that we do.

Roy: It's incredible. Incredible. I tell you. But that may not actually be a HIPAA secure way to communicate. The string has to stretch across everything. So, we might want to do it differently. Actually at [Person Centered Tech](#), the big thing for phone that we're recommending is [Ring RX](#). There's a bunch that start with the word ring. It's RingRx. We actually love it. Because it's made by healthcare for healthcare. It's super affordable. Does all the phone service things you need. And it has what's called a soft phone app, it's got an app on your phone, so it becomes a second phone line, through an app on your phone. So, you don't need two phones. So it does all that stuff. Though, I know Rob is a fan of [AllCall technologies](#). Which is also good.

Rob: I am. We've been using it in my practice for 5 or 6 years now. Really good company. Family owned. Great customer service.

Allison: I think Maureen Werbach recommends them as well, right? I think she does. She uses them for her group practice. Awesome. So can we talk a little bit about why you might not want to use Google voice, for instance?

Roy: Sure. There's no business associate agreement.

Allison: Boom. Quick and easy.

Roy: Actually, I can go into a lot of little nuances and me and security professionals can have interesting debates about that, that nerdy people like me can get really into. But, especially because the existence of things like [Ring RX](#), because of the lower cost, and the assurance of business associate agreement. So the insurance of HIPAA agreements. Doesn't make a lot of sense to use Google Voice, even though it's free. I've had security professionals argue, they have a G-suite account, we are paying for Google account. But Google voice would be part of that. It wouldn't be extra. And only \$5 a month to have the account.

But I've heard very big experts argue that because its phone service and this and that, and that it's Google, specifically Google, then they would actually say go for it, Google Voice. But, I'm going to argue don't. Because we're not a population that is super agile when it comes to managing information technology risks. So when you are agile at it, you might be able to do it.

Ring RX, you can spend like \$12-\$15 a month and get a lot more than Google voice does because you full phone service with the same convenience and also the assurances that your risk management issues are covered. So doesn't make a lot of sense to me to recommend Google voice.

Rob: If I can break that down for people, what Roy's saying, is unless you want to do a lot of extra documentation....

Roy: And knowing what all of it means. Yeah. Right. Which I don't recommend you try. It's just \$12 or \$15.

Allison: And nobody. I don't know any therapist who are like, I'd really like more documentation each week.

Roy: It's the best. Especially with technology.

Rob: Right, if it's about technology, they would love it.

Allison: Right.

Rob: That's the thing there. Sideline, grasshopper, those things, huh uh. Those are no-nos. In fact Grasshopper has a great page on their site talking about why HIPAA covered entities like us should not use them.

Allison: Oh, wow. They are opting people out. That's good.

Rob or Roy: Yeah, we were actually really impressed with how Grasshopper is very upfront. So we like them, but don't use them.

Roy: Definitely progress beyond a lot of the companies that say, oh these are the reasons you really don't have to worry about business associate agreements and things like that.

Rob: that's pretty bad.

Allison: Yeah. Cool. So we like the CYA, we don't want to get sued, we don't want to get in trouble. What about email?

Roy: Email is a very old technology that people use...

Allison: Tell me everything I need to know about emailing.

Rob: Well, I used to write programs that do emails, so I'm like, well first of all they are headers. And no. Ok, I have a great article, by the way, that you should send people to. Called the three kinds of email. It's an effort to break down, when we say secure email or encrypted email, there are actually a few things we could mean when we say that. And, so that breaks down what they are with little pictures so you can understand how they work differently. So I'm going to send you that, so maybe you can put it on the show notes? Would that work?

Allison: Perfect, yeah.

Rob: So here's the most fundamental thing. Your email service, you need to remember, the company that provides your email service is basically working in your practice. Like imagine that company and all of those computers are like in you're, in that extra room, off your waiting room, doing the service for your practice where they handle client information. Right? So, basically you need to treat them the same way you treat someone who works in your office. You need agreements, you need things like that. But since they don't work in your office, you can't control

what they do. So we use this thing used business associate agreements. Which are the official HIPAA way of getting an agreement with this company that they are going to protect the confidentiality of your information. Just like you would expect someone working in your office to do. So if you are going to use email with clients, what you can do, and the clients certainly want that a lot, you need that business associate agreement with your email provider. And so a lot of the classic email services, definitely free ones, you're never going to get that. But here's the thing, here's the good news. You can get great email with the business associate agreement for as little as \$5 a month. It's not expensive.

Allison: Yeah, I know, I use [Hushmail](#). Which...

Rob: Hushmail is great.

Allison: I got it from one of you, I don't remember which one. Or maybe both.

Rob: Either or both. Yeah, we both push them a lot.

Roy: Yeah, my favorite part of Hushmail, for me anyway, works really great for me is being able to embed the secure contact form in the website.

Rob: That's my favorite thing, too.

Allison: Did you build that?

Rob: Did I build that? No. that's a feature that Hushmail has. But I do provide a service where people want help getting that embedded in their website. I will do that for them through Tame Your Practice. I did not create it though. I build the form that, yeah.

Rob: Right. We could get into the tech geek part, the html and the css to create the actual form, yes. It interfaces with something Hushmail created to allow that secure channel.

Roy: I get to consult for Hushmail to see what's coming down the pipe with them. And they are actually making a form builder right now that's going that's going to make it so everybody can make forms like the one Rob has.

Allison: Are there other email services that you guys recommend for folks?

Roy: Hushmail if you want something like Hushmail, there's Luxsci.

Allison: That's confusing.

Roy: Yeah, I know. Not well named. They are a little more expensive than Hushmail, but they are similarly good. Proton mail is actually free and will do business associate agreements and secure email but you can't get your own name on it. You have to be like you@protonmail.ch or whatever. G-Suites or the Google, or MS 365 the Microsoft. Those accounts both do business associate agreements. But understand those are not secure for email.

Allison: Right. And that's because it's not taking people to a portal, right? Like yours is secure, but theirs isn't?

Rob: Basically right. Like you can...

Allison: [unknown 10:54.1] version.

Rob: Right. You can receive emails at it. But sending emails, once they go out onto the internet, they are just like any other email.

Allison: Got it. Whereas, what I love about Hushmail is it creates this little portal. Just like many of us have communicated with our providers. Like maybe our doctors or something like that, through their portals. So it's a similar kind of situation.

Roy: Yeah, the reason they do that is it keeps the communication on their servers, which allows it to keep it secure. Whereas with Gmail, once it leaves their servers, it's outside of that business associate agreement, essentially.

Allison: Got it. Okay, cool. So let's see. I'm going to pass this over to Rob. Another one I get is which practice management system should I use? And I'm always like, Go to Tame Your Practice! It's a big question, bigger than you know. What are some considerations, things people should consider when trying to choose which practice management system they should opt in for.

Rob: the biggest thing, the two biggest things are one, to access what your needs are. A lot of people start out with the question on the Facebook forms, which one should I use? And they get a flood of 40 different answers. So it's good for people to hear about other people's experience, but they really need to find a system that is going to match what their needs are. Some people really want that client portal, where they can have their clients fill out intake paperwork. Other people don't care about that. Some people want to be able to file electronic insurance claims. Other people are cash only and don't need that feature. So I cover a lot of that in my reviews. But what people need to do is sit down and say okay, what are my needs now? But also, what are my needs in 5 years? To change your EHR two years from now because you grew from one clinician to twelve and your system doesn't work for you anymore, so you need to look at not just where are you now but what is the system that I need to work for me down the road? And shop for that system.

Allison: Yeah. Which can be really hard if you're brand new, too.

Rob: Sure. A lot of new people, you hear about all these people who say, I didn't even know it was going to grow into a group practice, and here I am. So sometimes people don't know. But it's not that hard to find a system that has, the word we were using earlier, agile. It's flexible. It won't care whether you stay as a solo clinician or do grow into a larger group. And some people know, I have absolutely no desire. I know I'm never going to do a group that can be part of the calculation as well. And then you have the baseline understanding of what are my needs now, and what might they be down the road. Then, you can evaluate, okay, which system has most of the things I need?

Roy: And I'll back that up and say, we have of course our membership where we have office hours every week. And a question we get on occasion, not all the time, but on occasion, a person saying, for this reason or that reason, my practice management system doesn't do what I need, or I don't trust it. Or something like that. And they say, how do I switch? And we have to talk to them about it's hard to do. Switching to someone else. There is no easy way to just export your data and import it to the next one. There's nothing like that.

Rob: Exactly.

Allison: Yeah. I ended up, I had a system that was free back in my very beginning days. And just held onto it because it was working for me. And then, switched to a paid one, and I just go in there and make sure my password still works. Which is maybe not the best idea. But it's working for now. Because the idea of downloading three years' worth of files and I don't know, either storing them for years, and years and years. Or uploading them into my current system sounds like something I don't have a lot of

time or energy for.

Rob: Sure. And the good news is, a lot of the vendors know about our responsibilities for documents. And many of them have free or reduced cost options if you leave their system, so you can still maintain the records there without having to move everything.

Allison: That's really cool.

Roy: Or make it easy to download them all, but then they are just a bunch of pdf's or something.

Rob: You're not going to be able to just quickly import them into another system. Because they all use a proprietary database. They all store that information differently so there's not a quick way to match up and import.

Allison: Got it.

Roy: Choose wisely.

Allison: Yeah. No pressure, y'all.

Rob: And I'm happy to help people choose wisely through the reviews and helping them out as well.

Allison: So when does it make sense for people to consider encrypting their computer?

Rob & Roy: Now!

Rob: This very second. Encrypt while you're listening.

Roy: Was the emphatic enough?

Allison: That was emphatic and I love it. How can people....

Rob: I hear in Macintosh, you can literally do that. You can go into your settings and turn it on right now.

Roy: I mean, we could argue that oh well, you only have to worry about it if you have protective health information on the computer. But, chances are, they have personal information and beyond our lives as professional mental health clinicians, you probably have personal information on there that would make sense to encrypt the fold.

Rob: and also if you use the computer to access your email or your practice management system or anything online, where you have client info or just info that's important to your practice that can end up on your computer. Importantly, encryption is actually the best way to keep a bad guy out of your computer. The normal passwords, actually, if the bad guy cares about getting into your computer, a normal password won't do anything. Encryption will keep them out like permanently.

Allison: You were saying for a Mac, you could just go into settings. What do people who use PC's.

Rob: What's that called? The other one?

Allison: The other one...

Roy: So yeah, generally speaking, there are a couple things you can do that we recommend for simplicity sake. Is that you just, you need to get the pro version of your windows. Most people have the home version. Because, they weren't thinking about encryption. So they were thinking about I don't need the pro stuff. Which you don't, other than the encryption. Right? You need to upgrade to Pro. So if you have Windows 10, you need to upgrade to Windows 10 Pro. Or Windows 8 pro. Then, you get a program

called Bit Locker. And then, you turn on Bit Locker, basically the same, it's a good one to go into your settings in your Macintosh. Person Centered Tech, our members have videos which we walk them through turning on encryption for any type of machine.

Allison: nice!

Roy: And you can do the same with your smart phones, too, your Android phone has a setting that says encrypt the phone. So you'll have full encryption, already encrypts out of the box, it's just encrypting all the time. You just need a stronger passcode than the default one it lets you do.

So you need to set a stronger passcode, but it's already encrypting.

Allison: Got it. And that's on iPhone, too?

Roy: iPhone and iPad just encrypt naturally. This is what they do all the time. But the passcode is the weak point. So if you're still using the 4 or 6 number, just numbers, that's probably going to get cracked. You need to set a stronger passcode. Which you change your settings, and you can make a stronger passcode, and it doesn't matter, because you just use your thumbprint or your face recognition to log into your phone anyways.

Allison: Amazing. That's awesome.

Rob: good news, more and more things are moving to default encryption.

Allison: Good, yeah.

Roy: Makes things a lot easier.

Allison: Yes. Absolutely. And especially for people like me, a little bit tech phobic. I think I've grown. But I'm still, when I hear new things, I'm like, I don't know if I'm going to know how to do that. And that can make me put things off. I'll procrastinate if I feel like I'm going to want to throw my computer against the floor. All of a sudden it becomes a lot less daunting. And people can be more responsible with their practice.

Rob: you know, Allison. You can pick up some old cheap computers that are just great to keep handy, and you can throw those around when you get frustrated.

Allison: At least once a week I want to throw my laptop at something. And I'm like, not violent at all. It's the only thing that ever wants to make me hurt anything.

Roy: It's funny how tech can turn a lot of really sensitive, caring, empathic people into violence.

Allison: Oh yeah. It really can. So, I know something all three of us get a lot, too, is people wanting to be like, I live in state X, and I have this license. Can you tell me what I need or what I'm allowed to do? And I don't think that even between all three of us, we would be able to store all of that in our brains. How do you guys guide people to finding those answers for themselves?

Rob: Well, I haven't convinced any of those people to pay me to go to law school to be able to give them that advice. But fortunately there are some great resources out there, aren't there, Roy?

Roy: Yeah, there are. Well there's the Epstein Becker Green 50 state survey. Which is a good place to start. [Epstein Becker Green](#) is a law firm that I think they specialize in tele-health, I guess? But, they do this, they have this 50 state survey of all the mental health related professions. Like all of them. And tries to assess out all of the tele mental health or telehealth related laws and have them in one document. If you look for the Epstein Becker Green 50 State survey, you'll find that. Be real careful of relying on it as your only source, though. It can easily

be out of date, because tele mental health is such a hot thing that, I'm actually on a rules committee for my board, right now, about tele-mental health. So that document will be out of date for a little while once you make a few changes. But what it does, it shows you where in the state law they have information. Where do they talk about it? What actual legal body talks about what you do in your state? Right? So you can go look at that directly. Or ask the right person directly. Because one of the problems you'll run into, I mean, even with people asking us, really you should turn to your licensing board first, or your state legislature first. Because that's where the laws are. And a lot of them say, well I did. That's why I am asking you. I need information from them. Or I can't find the right place. So the Epstein Becker Green document is pretty good at helping go figure out at least the right place to go. And it certainly has been there before. So that, I think, is the strongest place to start.

Allison: Fantastic. We'll definitely have that in the show notes. I feel like these show notes are going to be 57 lengths. Which is awesome. Gives people a lot of options.

Rob: Hey, Roy, have you found that the American Tele-medicines Associations is keeping up with that as well?

Roy: I haven't actually haven't looked in their documents. They are not as thorough as the Epstein Becker Green. And ATA has put a lot more things behind a membership wall. Like you have to be a member. Even just for their guideline documents, you have to be a member now, to download them. Go to Epstein Becker Green, because you'll find that. Certainly people want to be able to get the information now. And to be eased into the idea of maybe paying for memberships.

Rob: Yeah, they got to do a feasibility study to make sure it's something they can pursue before going out there.

Roy: Exactly. They got to figure that one out first.

Allison: Awesome. You guys, this has been super helpful. So I want to thank....

Rob: We're just full of it.

Allison: well, you make it fun. The subject that could be potentially really dry, because of your personalities, you make it really fun and really accessible. So I really appreciate that.

Roy: Rob is like special gravy. Like talk about being dry. It's like Rob's like a certain kind of gravy. I'm like a marinade.

Rob: I've been called a lot of things. This is a new one.

Roy: you like to be called gravy, Rob. You know it!

Rob: Now I got to get a t-shirt made.

Allison: I love it. So if you guys are interested in hearing more from these guys, check out their podcast, Therapy Tech. Wherever you listen to podcasts. And Roy can be found at PersonCenteredTech.com and Rob is at TameYourPractice.com. You can click over from the show notes. And then, visit us at the Abundance Party at AbundanceParty.com before March 28 th if you want to participate in their hour long training. And if you're listening after the 28 th , it's no biggie, we'll have recordings of this along with the previous trainings so new party members won't miss out. See you guys next week. And thanks again to our sponsors. Please do not forget to check out the Highly Sensitive Therapist Retreat at hstretreat.com.

Thanks for joining us on the Abundance Practice Podcast. Check out this week's show notes for relevant links, resources and homework. If you're new to private practice, check out the free checklist you need to get started at [Abundancepracticebuilding.com/checklist](https://abundancepracticebuilding.com/checklist). And if you need more support, check out the Abundance Party at abundanceparty.com. See you next week!