Front Desk Software

for Psychologists in Private Practice

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Purpose of this guide

Many psychologists already use software such as word processing, spreadsheets and accounting packages to meet the variety of their private practice requirements. Increasingly, psychologists are choosing to adopt more professional business practice management software (whether it's a desktop or online package) to coordinate all front desk requirements. Such packages may reduce the need for a variety of software items and thus, enable psychologists to select the software which best suit their practice needs. Furthermore, several of the software providers are currently working on features that would comply with the national eHealth standards, such as secure message delivery (SMD). However, there is a wide variety of front desk packages available in today's market, and the decision process can become consuming.

In order to simplify the selection process for APS members, this document outlines key criteria and features to consider when reviewing the variety of software packages available that would be appropriate for the psychologist in a sole or group practice. To facilitate this review, a feature-specific checklist (see Table 1) has been developed for the APS members to use.

Process of developing this guide

A list of software features relevant to psychologists in private practice (see Table 1) was developed by the APS along with questions for practitioners to help them decide upon the software package that best suits their needs. Members are strongly encouraged to also make thorough enquiries when choosing to implement a software package to suit their private practice.

Key questions to consider in identifying specific software features to suit your practice

Please note that not all questions will be relevant to all members working in private practice. Some will only relate to large multi-practitioner practices, but others can be helpful for the sole practitioner. You will also need to consider the benefits and risk of using desktop or online front desk packages.

1. Is your PC hardware up to date and is it compatible with the software package?

The hardware requirements could vary considerably, depending on the sophistication of the software. Check with the software provider upfront to determine whether your current computer hardware will operate the software effectively so that you are clear about whether upgrades to your system will be required.

2. Is the software web or desktop-based?

If choosing a web-based package, are you connected to Broadband?

Benefits of web-based technology:
- Accessible from anywhere there is an internet connection (i.e. different rooms/offices)
- No installation
- Product is easily supported by the product supplier
- Upgrades and maintenance (including back-ups), are managed by the supplier and are immediate
- Remote telephone answering and appointment booking
- Increased storage is immediately available.

Limitations of web-based applications
- Data access inconsistencies – Reliance on internet connectivity (broken internet = no software package)
- Reliance on the IT infrastructure and system – Slower processing and data entry
- Privacy and security risks need to be considered
- More expensive over time – Set up costs are common plus on-going monthly costs indefinitely
- License fees often charged for each practitioner in the business.

Benefits of desktop software:
- More consistent data access – Not reliant on internet operation (i.e. doesn't crash)
- Less expensive – Once off set up cost to purchase license (i.e. no on-going monthly fees)
- Faster processing and data entry
- You own and control the data
- Could be more secure than web-based systems for personal, sensitive or confidential data
- Customisation to the specific needs of the business

Limitations of desktop software:
- May need to use apps such as "Remote desktop" or purchase another add-on software for diary web access or a license to add to lap top to access software out of office
- Could require higher responsibility for backups if no automated process offered
- Self-installation, including updates
- May require operating system and hardware updates over time

3. Is there an automated backup system?

Although, many software packages can automatically back up some data to the internet or a hard drive when a user regularly saves information, practice managers must take responsibility to ensure they have routine manual or automatic data back-up procedures in place; and onto a separate hard-drive; undertaken at regular scheduled intervals, (usually each service day), and verified for success. However, the frequency of scheduled data back-ups is likely to be dependent on the amount of data that could be lost. For example, daily back up might not suit those psychologists working part-time in sole private practice; as the likelihood of losing data in a 24 hour period is less. Automated back-up is a helpful option for busy full-time psychologists who do not have time to manually back-up their data on a daily basis, as they could lose a considerable amount of data if they have failed to back up at the end of each work day. Having an uncompromising schedule of back-up safeguards, protects a practice for any unforeseen IT malfunctions, and aids in implementing a disaster recovery policy within a practice.

4. Can you receive a demonstration and/or training of the software package; a trial; or "helpdesk" support?

Some companies will allow a month free trial of the software package, which is accessible from their websites or via customer services.

a. Are these services free or charged?

As certain software providers will only provide support for software-related problems, it is useful for members to develop a relationship with a local IT support consultant who will be able to assist them with general IT and hardware- based issues onsite. Some providers will charge an additional fee for annual subscriptions for IT software support.

Also, where psychologists are not confident in their computer or IT skills and believe they require additional software support they could consider developing a personal software support contract with their provider; as in some cases this could be less expensive than hiring an independent IT consultant.

5. Do you have to purchase the entire software package or can you select specific modules relevant to your practice?

Modular based software allows the psychologist to purchase only the relevant sections of the software that would be useful for the needs of the practice at any given time; and thus build on the base as the business expands or changes.

6. Has the package been designed specifically for psychologists or adapted from other medical or allied health packages?

There may be no differences, or advantages and disadvantages for either option. Many packages have been adapted to meet the needs of psychologists. Industry providers are typically responsive to practitioner's making suggestions as to the specific features they need to satisfy their business functions, in a competitive market.

7. Is the software package compliant with the Privacy Act 1988 and the relevant State or Territory Health Records Act, and the APS *Code of Ethics*?

Privacy of patient information is fast emerging as an area of concern for the general public. In response, the Australian Government is progressively strengthening the protection around disclosure of personal information.

Security is becoming increasingly important for hardcopy material and electronic communications. Hardcopy and electronic confidential information require different types of security systems to ensure business and client information is kept safe and members meet ethical and legislative requirements including the Federal Privacy Act and State or Territory Health Records Act.

Practice management systems that utilise cloud-computing must comply with the legislation for the storage and transmission of personal information. Where psychologists are unsure about whether components of their software package and/or SMD use cloud storage they should check with their supplier and seek confirmation in written form.

For example, a number of the software packages offer encryption software as an option. This means that practice data is coded in a manner that only someone with a practice-specific password can access and decode. This may be an extra feature of some software, and may incur an additional cost.

To safeguard privacy, psychologists might also need to consider hardcopy and electronic storage, secure messaging delivery (SMD), encryption, cloud storage, creating pdfs of reports; password protect documents and the computer; ensuring restricted access to practice IT; and keeping antivirus and anti-spyware software up to date.

Additional information regarding practice management privacy is available for APS members from *InPsych* articles from the Privacy Resources page of the APS website www.psychology.org.au.

- https://www.psychology.org.au/Content.aspx?ID=5859
- https://www.psychology.org.au/Content.aspx?ID=5962

8. Does the front desk software ensure secure message delivery (SMD)?

One of the key considerations in moving to an eHealth environment is compliance to national eHealth standards; that is, ensuring the appropriate level of security when transmitting patient information by using hardware and software that meets government industry standards. Access to eHealth-compliant practice management software, for example, is required for psychologists to be able to communicate with other health providers using the My Health Record (previously known as the Personally Controlled Electronic Health Record, PCEHR).

SMD is a set of specifications developed collaboratively by the eHealth community and driven by the National E-Health Transition Authority (NEHTA), Australian Federal and State Governments, Standards Australia, software vendors and SMD providers. This set of specifications defines an approach to secure communication using widely supported IT industry standards.

The SMD specifications support the secure delivery of messages containing clinical documents and/or other information between healthcare organisations, either directly or through one or more messaging service providers.

One of the major problems with SMD is that software developers have been reluctant to allow other message delivery systems to interface with their own system. This interface is referred to as 'interoperability', which means that if the receiver of a secure message does not have the sender's software on their computer, they cannot open its secure message. Fortunately, some product developers have made reasonable progress with interoperability, but no product currently on the market has total access to all secure messaging systems.

In 2016, the APS launched discounted secure message delivery (SMD) systems, (Global Health and Coreplus) that can work along-side various front desk software packages as an APS member benefit. You can purchase these packages directly from the APS shop (www.shop.psychology.org.au). Furthermore, the APS will also launch an ePsychSafe directory (www.epsychsafe.com) that will register and endorse members who are compliant with NEHTA approved SMD systems by July 2016; with the aim to release a searchable listing (by August 2016) embedded in *APS Find a Psychologist*. This directory will be promoted to practice management software providers, GP's, Primary Health Networks, allied health practitioners and users of SMD.

9. What financial investment can your practice afford?

The cost variations generally reflect increased options and the degree of complexity and sophistication of the product such as:

a. Number of software licenses for additional workstations

b. Remote or clinic networking

c. Number of advanced features

It is important that psychologists consider whether all advanced features are necessary and whether the package can be tailored to their individual needs. And potentially reduce the costs.

10. Does the invoicing system offer the range of financial transaction services required by your business?

A client database that interfaces with the billing functions of software packages allows psychologists to simply generate accurate invoices, receipts, quotes and track outstanding invoices, as well as financial and statistical reports.

Some software packages are able to generate a variety of practice, financial and statistical reports which ensures psychologists can easily track the financial income and expenses of their practice, calculate GST, and manage bank accounts more simply. Furthermore, some are also compatible with commonly used accounting software packages such as, ZERO and MYOB.

a. **Does it provide online billing to insurers and/or connect to merchant functions?**

Software for psychologists must include flexible invoicing and receipting in order to cater for Medicare Benefits Schedule (MBS) items, Medicare Easyclaim, and Medicare Australia Provider Numbers. Software that caters for online billing to private health insurers, third party funders, as well as connect to HICAPS, EFTPOS and credit card facilities, simplifies managing funds within a private practice.

11. Does the software package allow for a detailed database of client records, referral details and financial information?

A detailed client records database is essential for any psychologist in private practice. Managing private and confidential information such as contact details, personal Medicare information, reasons for referral, referrer's information and payment details must be easily accessible and simple to use for psychologists. The issues of confidentiality and data protection are critical in the electronic era. Some encryption software is available for reports and client files.

In addition, some more sophisticated client data options could be available such as, the electronic development of reports and graphing of statistical information that could help determine the demographics and psychological profiles of a psychologist's client population; or generating reports and information for individual clients or the client population on information including payments, lengths of session and reasons for referral; or connecting electronic client handouts to client files.

a. Does the database link to letter or report templates to facilitate external communication?

Psychologists often undertake written communication with referrers or external bodies, therefore a client database that links to letter or report templates can be very useful in reducing the time required to complete any external communication.

12. Is the appointment scheduler scalable to suit any sized practice?

Psychologists work in a variety of settings including the solo and large group practices, thus the software of choice should cater for their specific needs. Furthermore, in a large practice it should have sections for each individual psychologist and an option for unlimited practitioners (multi-practitioner usage). It is also worth considering, if the package offers multiple site appointment scheduling for those who work from a number of locations.

a. Is viewing appointments or diary entries simple, easily accessible, and flexible?

Being able to view the diary from daily, weekly, and monthly, or per practitioner, or by location may be important in some practices. Psychologists may also need to vary their consultation times depending on the client. Thus flexible scheduling such as alterations to length of time, cancelling, rescheduling or deleting appointments is helpful to keep a psychologist's diary up to date.

Search features associated with client details are useful tools allowing psychologists to easily access client information such as referrer's details, client history, payment history and appointment history when seeing new or ongoing clients.

Some diaries include colour coding, symbols or descriptions available that provide easy identification of the client, and type of consultation (e.g., assessment, organisational consultation).

b. Does the diary offer automatic appointment reminders by generating automatic mobile text messaging or emails to clients?

Be aware that this may be an additional cost per message sent. While it is a useful tool, ensure you seek information about costs prior to inclusion of this feature.

Table 1: Displays a checklist of software features that psychologists can use to undertake their own review of each software package. (This is not an exhaustive list and does not represent all of the features available for each software program).

Features relevant for psychologists	Example	Software name
1 Appointment scheduler		
Scalable to suit any sized practice	P	
Multiple site appointment scheduling	P	
Daily, weekly, monthly, practitioner, location views	P	
Different appointment duration	P	
Colour coded appointment types	P	
Move, delete, copy & cancel appointments	P	
Search features for appointments	P	
2 Client records and data administration		
Letters – User definable templates	P	
Separate areas for each psychologist	P	
Report generation	P	
Recording and graphing of statistical info	P	
Connect to electronic patient handouts	P	
Post codes database	P	
Can use billing items/type of appointment	P	
SMS or email reminders to patients	P	
A detailed patient record and data bases	P	
Maintain referrer information and type	P	
Encryption of documents and reports	Î	
Secure messaging	P	
3 Billing options		
Invoicing and receipts	P	
Options for details of private health funds, Medicare items etc	Health fund only	
Ability to support electronic billing of health funds (e.g., Medicare/private health funds)	P	
Contacts database/address book	P	
A variety of practice, financial, management & statistical reports	P	
4 Hardware		
Compatibility: • Windows PC	P	
• Mac	Î	
• Single user	P	
• Multi-user (network)	P	
5 Software Package		
Receive software updates	P	
Time delay explanations of buttons	Î	
Drop down menu windows	P	
Web based software	Î	
PC based software	P	
Automated backup	P	
Demonstrations available	P	
6 Focus of System	Allied Health	

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APS Australian Psychological Society

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