

# Going digital

**Sally Brown** looks at the pros and cons of using a digital practice management system

**A**s any therapist working in private practice, or any service provider, will tell you, the admin involved in running a practice can be time consuming. At its most basic level, it includes scheduling and booking appointments, tracking payments and recording and safely storing client notes and other personal data. I'm assuming I'm not the only practitioner who uses a mixed bag of digital and manual/paper-based approaches. It seems to work fine, but I often wonder if it could be done more efficiently, saving time and freeing up headspace, if I embraced one of the many software programs on offer designed for therapeutic practitioners.

I also wonder whether clients will increasingly expect the kind of service offered by many of these programs, such as text or email reminders of sessions, invoices with one-click payment, and the option to log onto a website and view available appointments. And then there is the question of security and GDPR compliance – cloud-based practice management software allows you to securely store client notes and data separately from your personal devices. It also offers a potentially more streamlined 'clinical will' option, whereby the practitioner/supervisor designated to inform your clients in the event of serious illness or death could securely keep (for example password protected on their device) the log-in details for your software, so they can access your client contact details in an emergency.

Keeping digital rather than paper records also solves the problem of where

to store your growing collection of client notes. It's telling that the retailer John Lewis recently announced it would no longer stock filing cabinets, suggesting that, as a nation, we have used the lockdowns to finally transition records and paperwork to digital.<sup>1</sup>

But practice management systems are about more than record keeping – software providers are now striving to be a 'one-stop shop' for practitioners, with many offering integrated

videoconferencing and client invoicing systems with one-click payment options linked to financial service software such as Stripe, which means clients' bank account details are held separately and securely.

One size does not fit all when it comes to therapy, and one of the most appreciated features of today's practice management systems is how customisable they are. That means you can create your own templates for client messages and record keeping, either by tweaking the system's templates or starting from scratch. And there is much to be said for using a personalised template for process notes – filling in information under subhead prompts can be a time-saving way to ensure you record key information after a session in a consistent way.

One of the other main advantages of a subscription-based platform is that you get unlimited access to cloud-based storage, freeing up space on your laptop or tablet, and also offering you security and continuity should your device crash

## Practice management options

**All services offer a free trial and, except where indicated, services are suitable for both individual and group practices**

**bacpac.** A collaboration between BACP and NHS software designers Mayden, launched in 2015, bacpac is simple and therapy specific. From £18 a month (concessions available for newly qualified, charities and group users).

**Pragmatic Tracker.** Talking therapy-specific software system with a focus on tracking client outcomes using a range of measures, as well as record keeping and appointment scheduling. From £150 for a 12-month contract. BACP has a number of free licences for members as part of the Advancing Practice through Tracking (AdaPT) project. See [bit.ly/Proj-AdaPT](https://bit.ly/Proj-AdaPT)

**WriteUpp.** A popular choice for talking therapists, launched in 2008, with an emphasis on friendly customer support. From £17.95 a month for one user.

**Power Diary.** Launched in 2008 in Australia, it's now a slickly designed market leader with global support teams. From £4 a week for the first six months.

**Cliniko.** A global program launched in Australia in 2011 and originally aimed at health clinics. Free for registered charities (normally £29 a month).

**Counsel360.** Launched in 2017 and UK based, specialising in programs for counselling services. Prices vary by volume of user, but the typical cost works out at less than £1.50 per client session.

**Kiku.** UK-based talking therapy-specific system with an emphasis on practitioner support and community. From £9.99 a month.



or get hacked. All this does come at a cost, however: monthly subscriptions average at around £18, although, in an increasingly competitive market, all offer free trial periods and some reduced price introductory deals.

### Getting started

If you're just starting out in private practice, it makes sense to start from scratch with a digital system. More established practitioners may be wary of the perceived 'hassle factor' involved in transitioning over to such a system, and then getting the hang of it. But providers are aware that this is a major barrier, along with lack of personal confidence in getting used to new technology - the 'not-good-with-computers' factor. Much of the work that has gone into designing these systems has been focused on making them user friendly - simply because, otherwise, users won't use them.

'We have designed the system to feel intuitive and natural,' says Damien Adler, a psychologist turned CEO and co-founder of Power Diary, an Australian-originated system that is now being promoted in the UK. 'We also hire good "people people", then we train them about IT - we don't hire technical wizards, and then try and teach them to be "people people". So the team are very aware that this is novel to many users, and the emphasis is on explaining and adapting to user-learning style, which might mean watching videos, having a conversation, or being walked through a test site step by step.'

Getting started can seem daunting but, as Bob Bond, co-founder and CEO of the British-based system WriteUpp says, you don't have to do it all at once. 'Taking a step-by-step approach can be more achievable for many. Some practitioners, for instance, start by using the appointment management side only, to book in client sessions and send reminders, while still using paper client records. Once they feel comfortable with the booking system, they can then think about trying the record-keeping system. Some people do it the other way round, starting with the digital record-keeping side but continuing to use their paper or digital diary for client appointments.'

## *'It can be a value-for-money way to streamline your practice'*

**Kelly Porch is a counselling trainer and a Kettering-based counsellor in private practice who manages her practice with WriteUpp**



'I was looking for a digital system as I work from home and didn't feel comfortable with the idea of paper client notes stored in my house. As WriteUpp was developed for NHS talking therapy services, I felt reassured about the level of security and GDPR compliance. I signed up for a free trial and just worked out how to use it myself - support was on offer, but I found it was straightforward after watching the video tutorials. There are lots of features I like, such as tracking your income against a target you have set. I also like that the client messaging is customisable - I ask clients to pay 48 hours in advance of their appointments so I have an email message that goes out to remind them. I find it particularly useful for supervision - I can just pick up my tablet and take all my client notes with me in a safe way. You can tag your client records as "open" or "closed", which means you can see your current active caseload in an instant. I think I could probably make more of it if I spent some time exploring all the options, and there are features I don't need such as the client payment system and the videoconferencing, as my clients are comfortable with Zoom and paying by bank transfer. If you are just starting out with one or two clients, the monthly fee may not feel worth it, but once your practice is established, it can be a value-for-money way to streamline your practice.'

If you've previously kept digital notes, such as password-protected Word documents, you can easily upload these to most systems. With handwritten notes, Bond suggests taking a 'start from scratch' approach. 'Choose a date from which you're going to go digital, and record client notes on the system from then onwards. You could create a summary document of key points for each client's history and progress so far. It's the model NHS services took when they transitioned to digital.'

You may want to keep your existing paper notes for the length of time suggested by your liability insurer (usually six years after the work has ended, which is the window within which a client can bring a complaint), but at least they will no longer be growing.

### Practice growth

Not surprisingly, most software providers saw an increase in demand last year, especially from counselling services who were suddenly faced with the prospect of co-ordinating several practitioners

working from home. 'It can feel like a big leap for a service that has been entirely paper based,' says Gareth Creaney, co-founder of Counsel360, a British-based company providing digital solutions for counselling services employing 25-100+ practitioners. 'We start with a system that the admin team can work with. Then it can be rolled out to the individual counsellors. Services are increasingly looking for a way to deliver consistency of service that is GDPR compliant, even if counsellors are working mainly from home. The appointment booking and reminder process is particularly valuable - one manager told us that the text reminder service reduced client DNA rates from 25% to 5%.'

Many software management systems aimed at services also offer an efficient way to track outcome measures such as CORE, PHQ-9 and GAD-7 to demonstrate the effectiveness of the service, and also as a way to map typical client profiles, both of which are increasingly necessary when bidding for ►



## In practice

grants, funding or contracts. 'Investing in a practice management system can play a key role in helping a service grow, and we can design it with that in mind, to fit where the services want to be, as well as where they are now,' says Creaney.

Some of the newer providers market their products to holistic 'therapists' in the broadest sense, to widen their customer base. Of course, many of the features – client records, appointment booking – are transferable to talking therapists, but some features may be redundant. Would you use a function that allows new clients to book a session with you directly from your website, for instance, or for existing clients to be able to log in, see what sessions you have available, and move their appointment? Many systems also offer the option of client log-ins so they can access their notes and records, which not every talking therapist would want. 'Don't pay for all the bells and whistles if you won't be using them,' says Bond.

bacpac is one system that was specifically designed to be simple – 'the first logical step away from pen and paper,' says Martin Davies from Mayden, the software company that collaborated with BACP to create this talking therapy-specific practice management system in 2015. 'Our emphasis is on secure and consistent record keeping, simple analysis of outcome measures and diary management. Sometimes therapists start with us and then move on because they want more, such as an invoicing or direct payment system, and that's fine. You can download your data into a secure file and easily upload them to a new system.'

No system can suit every practitioner, however, as we all work in different ways. For Newcastle-based counselling psychologist Dr Rhian Lewis, the solution was developing her own program, Kiku. 'I went to a local software developer and said, "This is what I need, can you design that for me?" and they did,' she says. She initially offered it for free to other practitioners, and recently started to charge for it.

The choice of systems can be overwhelming, and the basic functions are offered by all, so it might help to think

### *'It has saved us loads of time on voicemail ping-pong'*



Rebecca Fox is Clinical Lead and Managing Director at Trauma Recovery CIC, a Hertfordshire-based counselling service, which uses Power Diary

'Pre COVID, all our work was based at the centre and most of our records were on paper, apart from a basic client database. As soon as we started to work remotely, it became clear we needed a digital system. I did some research and settled on Power Diary as it seemed to offer what we needed at a price we could afford for our team of eight counsellors and an admin assistant. Transitioning over to the database was quick and simple, and we took a "start from scratch" approach with process notes (we still have the old paper notes in a secure lock-up). I learned to use it by trial and error, and found the templates for the client notes and email responses simple to customise. When I did need support, it was available through messaging via a chat box, with follow-up emails. Our admin assistant also adapted very quickly, but the counsellors found it more difficult, so I had to do individual training for them, using a split screen and talking them through it step by step. Apart from consistency of client messages and record keeping, one of the biggest benefits has been simplifying our assessment process. We work with victims of sexual violence and get funded client referrals from several agencies. Now we can send new clients a link to a portal where they can see available appointments and book their assessment online – that has saved us loads of time on voicemail ping-pong. It has also made case management more efficient – I can quickly pull up the notes before the meeting and also look at them at the same time as the counsellor working from home. Teething troubles aside, going digital has been time saving and has certainly helped me manage the service during COVID.'

about what else is important to you to help you choose. If, for instance, you are interested in tracking and analysing client outcomes, make sure the software offers this analysis. Does it, for instance, allow clients the option of inputting outcome measures directly into the system? Does it present client progress as a graph? Or if you would like to simplify your payment system, look at one of the more sophisticated packages. For therapy services, a program that incorporates a secure videoconferencing system could save you the costs of a professional Zoom licence.

#### Try before you buy

Most systems offer a free trial, and full 'onboarding' support should be available during this trial period, so, as well as the functionality, be sure to test that. How quickly do you get a response to a query? What other ways can you get support – for instance, are there instruction videos to watch?

Trialling a system properly does require time and effort to enter the details of your active clients and appointments into the system, so it's a good idea to do some research first. But, as with bacpac, most now offer simple 'offloading' options, where everything you have entered in the system can be transferred to a secure file, from where it can be uploaded to other programs. It's worth visiting the websites of the main systems on offer (see the panel on page 22) – many offer sample pages to view so you can assess if you like the look and feel of the product.

Of course, no system, however sophisticated, will offer you exactly what you need. But every practitioner I have met who uses a digital management system says they couldn't imagine running their practice without it. ■

#### REFERENCE

1. Wicks P. How we shop, live and look. London: John Lewis Partnership; 2021. [bit.ly/3nC0H3c](https://bit.ly/3nC0H3c)