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10 things to look for in an online client management system for counsellors

by Michele Rees-Jones, Marketing & Creative at Mayden

Paper notes and filing cabinets. Excel spreadsheets and Word. Professional calendars here, personal calendars there...

For some counsellors, keeping notes from treatment sessions with their therapy clients can be a doddle. For others it's a constant administrative challenge of managing paper records and updating various databases and other documents, and manually assessing clients' progress. Not to mention dealing with the ever present risk of losing a highly confidential client file.

For some counsellors with a small caseload managing the paperwork may not be quite so challenging, but for others it can be a headache that they could well do without. Online client management systems can be a great way of reducing the administrative burden, helping counsellors and therapists to manage their caseloads more efficiently and keep records as safely as any NHS system. In addition, some systems also offer client outcome questionnaires and reporting, allowing counsellors and therapists to really track their client's progress throughout their treatment.

Ultimately, when choosing an online client management system for therapy it really comes down to how you want to manage your client records and what you want a system to do for you. Read on and we will help you to understand what to look for in a client management system that will help your practice to run more efficiently and smoothly day by day, leaving you to concentrate fully on what really matters: your clients.

About the author

Michele Rees-Jones leads the Marketing & Creative team at **Mayden**. Michele joined **Mayden** from the NHS, where she worked primarily on large-scale change management projects and marketing strategy. She works closely with **Mayden's** product team for **bacpac** who are passionate about ensuring that users' feedback and ideas are taken on board to deliver a system that really works for professionals in private practice.

1

Recording client session notes safely and simply

Keeping client session notes within an online system has many benefits, but the key benefit has to be the security and data protection that many systems offer.

When choosing a system make sure you vet it carefully for its security credentials. Some systems are as secure as any used by the NHS and adhere rigorously to the same standards of data safety. If you're currently using a spreadsheets package, don't simply swap one insecure system for another.

Keeping all your records in one place can also help you to manage your records simply and consistently - no more flicking between folders and files. Some systems will also allow you to customise your record keeping to suit you. Check out whether the systems you are considering allow you to customise them so you only keep the information you really need. If you look for systems that offer security, simplicity and the ability to customise your records to suit your practice, then your research is off to a flying start!

2

Record client contact information

When you're looking at systems try to find out how easy it is to get started with uploading new case files.

You should be able to do this with the minimum fuss and get started straight away with some simple data entry such as a client's name and address. Again, the security of the system is key. Your clients' personal data is your responsibility and it's up to you to find the best way to keep it safe.

3

Ease of booking appointments

Booking and managing your client appointment schedule can be easily managed if it's all done within the one system and ultimately this should save you time.

Some systems will allow you to sync various calendars, so you can always see when you have free spaces to see clients. This will help you to avoid double-booking and to easily reschedule if something needs to change.

4

Self referral

To make booking appointments even easier some systems allow potential clients to refer themselves to your service.

By simply adding a link to your website, or to wherever you advertise your therapy business, you can easily find more clients and most importantly - they can find you. Whether you choose to accept their referral is up to you, but it's great to have the choice!

5

Managing your caseload

Managing your caseload well is key to letting your clients feel that they are in safe hands, and ultimately the hands of somebody who cares about their wellbeing.

The system you choose should help you to manage your waiting lists clearly and easily, so clients know when they can expect to see you and that they won't be inconvenienced by cancelled appointments. Your system should allow you to pull up client details in a couple of mouse-clicks and help you to keep your open cases distinct from your closed cases.

6

Outcome measures and reporting

If you want to use client outcome questionnaires to monitor your clients' progress, then make sure you look for a system that specifically offers you this.

Some systems also offer the ability for you to generate graphs that visually depict how your client is doing.

7

Generate correspondence

If the administration associated with running a private practice is a headache for you, then look for a system that will automatically generate correspondence for you.

Some systems will allow you to generate client appointment reminders and letters, and this also has the added benefit of helping to reduce the number of clients who fail to turn up for their appointments.

8

Tracking and managing your practice finances

You may want to keep a grip on what your forecast income is from your therapy sessions.

If you would like to manage your practice finances from one place, research systems that allow you to enter payments against your client records. This way you can keep a visual running check on what you have been paid, what you still expect to be paid, when, and by whom.

9

Portability

Do you work from multiple practices or therapy rooms? Perhaps you sometimes work from home?

If you do, then look for a system that affords you as much flexibility as possible and allows you to take your caseload with you, wherever you work from. Some systems can be used on a PC, a laptop, a tablet or a smartphone so your data and your notekeeping is constantly synced, meaning you never lose your information or have to remember to enter it at a later date. The same level of security still applies, so even if you accidentally left your device somewhere or lost it, your client data would remain safe and secure.

Pricing

The all important "p" word. Every counsellor and therapist will have different requirements from an online system.

As such you should expect to pay a price that fairly reflects the level of sophistication of the system you choose. All online client management systems are priced differently and it's important that you compare and contrast the functionality of a system with the price you are willing to pay for it. Don't be tempted by a low price tag if it doesn't meet your requirements. You'll simply be left with more problems.

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Finding out more

By now you will hopefully have gained some insights into what to look for when you are considering investing in a client management system.

Mayden have worked to bring you **bacpac**® - a comprehensive yet simple and versatile client management system for counsellors and therapists working in private practice. With a dedicated and friendly support team on hand to help with any queries, **bacpac** could be the edge you need.

01249 701100
martin.davies@mayden.co.uk

Watch the bacpac video

Hear what other counsellors have to say about **bacpac** by watching our short testimonial video or sign up for a free, no obligation trial.