Why I love google (2023-01-28 17:52 GMT-8) - Transcript

Attendees

Dr. Tara Sanderson

Transcript

Dr. Tara Sanderson: Hi everybody and welcome to this solo episode on Why I Love Google Workspace. I love Google Workspace. I think that it has a lot of really cool tools for me as a practice owner for me as a supervisor to be able to manage, not only my internal folks that I supervise. But also my external folks that I supervise The biggest thing for me is to keep things easy, so that I will do them, but it also has some, a lot of really cool robust tools for me to be tracking things and monitoring things and managing things. So, I'm gonna put things into two camps. One camp is my internal, folks, the folks that I super advise inside my practice and then my external folks, most of the stuff that I do with my external, folks, I actually do inside of simple practice, which is my EHR.

Dr. Tara Sanderson: And the reason for that is that it makes it easier for me to keep all of their documents kind of safe and, and away from me, to do things in a similar way that I do to the rest of my clientele, which is kind of nice. But I do do some things inside of Google Workspace with my external clientele as well. So, I will make sure to to chat about that. But we're gonna start with my internal folks.

Dr. Tara Sanderson: And let's talk about this from from a couple of different perspectives. Number one, we're gonna talk about Google Workspace as a hub. So Google works places. A place where I have most of my things for my practice. So, I have, I keep all my financials in there. I keep all of my records for HR and stuff in there. I use a bunch of different things to do with that. I also use it as a place for all my onboarding, all my off-boarding. I use it as a place for communication between 19. We record our didactic meetings and keep things in Google Drive. I use it for a lot and the reason I do that is honestly because I pay a lot of money for Google Workspace. So I'm gonna use every tool possible in their little kid, in order for me to be successful with my team.

Dr. Tara Sanderson: So, Google Workspace is my hub, I have everything in here and as I got started in Google Workspace, I started thinking about the fact that Google is a big entity and I didn't want them having, you know, access to my confidential client information. So through Person-centered Tech, I read, I worked out that there is a Google manual for how to make sure that you are meeting the HIPAA security aspects of Google. So there are sections of things that you can't use. There's sections of things that you can use and they're settings that you have to change things to in order to be HIPAA secure and it is unfortunately your responsibility to do those. And it doesn't just happen. When you click the button of, Yes, I want to be a A You have to go in and change a bunch of the settings. So one of the tips that I'm going to give you at the end of today, is that you need to get that manual. You need to read from it and learn from it and set up your settings correctly.

Dr. Tara Sanderson: but, In addition to that the other piece was I wanted to make sure that everybody had access only to the things that they needed. And one of the things that is cool about Google is It does give you some pretty granular ways to make sure that students have access to this stuff and that maybe employees have access to this stuff and maybe your HR department has access to this stuff but not the stuff that's clinical so it really gives you a lot of options in in those places even to the extent of like Can people download from Google Drive, you can decide whether or not they can download stuff from Google Drive or not, which is really cool to be able to say, like, yes. Students, you can download these different, maybe they're worksheets or things that you want to use in your practice.

Dr. Tara Sanderson: But maybe you don't want them downloading some of the training videos because maybe you've made agreements with different people about that. If you've taken my course, you'll know that I am a really big proponent on any training. I go to, I ask if I can record it for my trainees in some future date, most people are really cool about it, some people aren't but if you have gotten permission that you can record it and keep it for yourself, then that's great. But maybe that means that you don't want your supervises or anybody else that you're practice. Downloading those.

Dr. Tara Sanderson: So next, you know, now that we've got this at a granular level and we've got things set up that way. One of the big things is really working on. How do we keep things in the circle that we're not getting access to things that we don't need to be giving access to? So, one of the cool parts about Google, Google, always wants to connect people. So if I start writing in a Google word, Doc somebody's name it immediately wants to put this tag on them so that they can can see this and have access to it too. Well sometimes you don't want that, right? Like if I'm writing a progress improvement plan for for a supervisee, I don't want them having access to it until I'm ready for that, right? So you can set up Google to not to do some of those things that are supposed to simplify the process for other types of businesses, or you can have things set up where it does notify people and it navigates it that way, one of the cool things that I love is being able to add a comment to like a Google Sheet or something. And then, I can, I can at somebody, I can say like at

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Dr. Tara Sanderson: Assistant, and then tell her something about that document and assign it to her. So then in Gmail, she gets this email. That says, Hey Dr. Tara sent this over to you and in her Google tasks. It now says, Tara has assigned you this thing to do, so it just keeps this like flow of information going, which is so spectacular for being able to assign tasks to people or have people fix things or have people check in on things especially some of those parts that are more ad many tasks rather than clinical tasks. So keeping things in the circle is always something that I'm kind of checking in on of like how can I keep things within Google within my team? Where are we, where are our holes in? What gets sent out of our network and out of our system and making sure that only the people who need to see stuff can see stuff within that system. so, I do want to talk a little bit about,

Dr. Tara Sanderson: Google Tasks Spaces and Internet. So I told you a little bit about tasks just a moment ago. Here are something interesting about tasks so you can have your task lists, show up, in your Gmail, on the right hand side and it can list off a bunch of different things that you've got going on or ways that are tasks that you want to do. You can click the Task button and it will just create a new one. You can organize them by a little star system and all sorts of things but another really cool thing. If you've got an email that you want to follow up on,

Dr. Tara Sanderson: You could add it to your task list just by the top of the mail bar. So when you select an email up that the top, there's all these little icons, there's one that looks like a check mark and a plus, that's the task list. If you click that button, it will pop it over as a task of something to do in that task list so that it doesn't have to sit in your email box anymore. If you don't want it to, but it is something you you're going to get a reminder to follow up on which is kind of cool. I use that actually a lot especially for things like I have an entire task list of

Dr. Tara Sanderson: Um, a failed emails that have gone through so that I can remember to let a client or a clinician know that an email didn't get to where it was supposed to go or whatever or if I'm needing to keep tabs on an email string, I can put it over there and have things pop up for me in the way that I'd like them to go. So it is kind of cool. I keep my task list of my general one for me. I keep one for those field emails and then like if I'm working on a specific project, maybe I'll have a task list for that. Like right now I have one for a grant that I'm that I got. And on that one, it is. These are the people who responded to me about that Grant and I need to respond to them so that I can click through that list. See the email respond back and then close it out and know that I have done that which is kind of cool. It doesn't get lost in my in my giant email list. You can also a navigate tasks within Google spaces. Google Space is kind of like, little, I guess little chat rooms for different purposes.

Dr. Tara Sanderson: I have about eight to ten of those spaces within my practice. I have one for referral coordination. So our referral coordinator is able to post when she has when when she has questions. If somebody's got openings or different things, that's a way for us to communicate pretty quickly. I have a quest board for me and my assistant, that is all of the tasks that I'm assigning her, and where we're at. On those pieces, we have one for room schedules, so that people can pop in there and be like, Oh I'm not gonna be in my room today so people can move around and and navigate any room changes that they need. We have a vacation schedule books that we're reading so that people can post about what they're reading right now. Powerful, social media therapist, memes podcasts we love, we have an assessment group where we only talk about assessments, and where we're at the different pieces, or who's got what equipment. And then I have my drop-in office hours room.

Dr. Tara Sanderson: That just has it basically. Just has the post of the link to, or might the Google meet room that I'm in when I do my office hours but also people could post in their questions that they have for office hours. So I can make sure to navigate those. I created this about halfway through the pandemic because I realized that I wasn't just down the hall from everybody. And, you know, people weren't having as many opportunities to just pop in and ask a question or see me or whatever. So this is a great opportunity for for a spiritual folks, to have a moment where people can see you when they when they need to. So I post my office hours inside of simple practice of when I'm available and then they are able to pop in and I'm just sitting in the meat room. Usually, I'm just working on other stuff male and whatever, but then they can pop in and see me just just as if I was down the hall, which is kind of fun.

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Dr. Tara Sanderson: So when you click, when you make a new space and you click on it, it gives you three options up at the very top the chat function which is just communication back and forth. The file function, things that are getting shared between the people in the group and then a task button. And now this task list is specific only to that group of people, but it's a shared task list so that people can move things back and forth. So, if you have a department that is needing to collaborate all the time, this kind of document is great for that to be able to keep things kind of straight of who's doing what and when things are due and

be able to chat about them. So it's kind of fun to use that Spaces task list. the other thing that I use a lot inside of Gmail, is

Dr. Tara Sanderson: their function to be able to schedule. Send sorry, I'm clicking through this as I'm doing it because I want to make sure that I'm talking about things using the right terms. But in each email, as you click Send down at the bottom, you do have a button that's that is right next to it. That's just a little down arrow that says More Send options and when you click on it, it says Schedule send. I use this all the time to be able to send things when I want them because I could be thinking about 12 things that I want to tell my supervises that are too much for one email, but I don't want to send them 12 emails so at least not all at once. So, maybe what I'll do is I'll say, okay, these things need to be done before these things. So I'm gonna send those emails now and then I'm gonna send these emails tomorrow and these emails on Thursday because then it's spaced out to where I need them. But I've already written them and gotten them done, which is great.

Dr. Tara Sanderson: I also use this for things like I take I do a quarterly feedback session with my supervises, that's just started in 2023. I'm very proud of myself. It's only taken me a four years to add that into my routine but in that quarterly feedback session I have them answer four questions on a Google form for me before we meet, and is it for questions? It might be more than four questions but I have, I asked them a few questions and I have them fill it out before we meet. And what I've done is, I've created that form. And I've created a little template email and I've, I went to schedule, send and I scheduled it to go out at the beginning of the month for every, every month that I'm gonna do those quarterly things, which is great because then my peeps can just get the email as if I wrote it that day. But I got to write it all in January, and I don't have to go back and look at it. It's fabulous.

Dr. Tara Sanderson: Now I will say that schedule, send works like a dream. The biggest issue always is remembering that you sent something or scheduled something to go out already. So make sure if you've got this great idea to send this thing that you check that you didn't already make that great idea and send that thing because sometimes I will tell you that I have sent something multiple times and my people will be like why? Well, because I forgot that I sent it. I forgot that I was that awesome and sent it early.

Dr. Tara Sanderson: So that's one of the tools in Gmail that I really like, I was chatting with another supervisor the other day about how she uses templates. Now, inside of Gmail, you have the option, when you go to compose a message down in the bottom of the message, the three little dots, which by the way, if you didn't know this, those are called the kabob. Um, When you click the kebab, it'll bring up an option to do templates to do labels. Plain text mode print blah, blah, blah. If you click on templates, you can create a template for all sorts of different things. And this supervisor, and I, when we were chatting, she said that, whenever somebody asks her, a question about a specific policy or about how to do something when she answers, she creates a new template for that question for the future. So that when, when and if somebody else asks for that question, she can just go to her templates. Send it out, and she doesn't have to do more than like two clicks to get them and answer, which is awesome. I

Dr. Tara Sanderson: Totally agree with this and love the idea of creating a template. This way, I also would say that if you've got somebody, who's asking a question, absolutely make this template, do the thing, but also create a little video on how to do it, put it out on your Internet so that people can go back and find it so that people can find their own answers to your questions, instead of it always having to go through you. If I have learned anything from Casey Compton, it is don't be a bottleneck in your business, figure out ways to help people do things themselves and have the mastery to make sure that they're able to do their jobs without you looking over their shoulder or micromanaging them, it's fabulous. So speaking

of that, I want to talk about the intranet part of building inside of Gmail. So basically inside of Gmail, it's called a site.

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Dr. Tara Sanderson: So, if you go up to the little nine boxes in the upper right hand corner of Gmail, it's it takes you to the rest of the Google apps. Which by the way, if you didn't know those little mind boxes, they're called a waffle. You're welcome.

Dr. Tara Sanderson: If you cruise down through some of the apps that are, and then you'll see one that says Sites. If you click on it, it'll take you to the Google Sites piece of it and you can create an internal site for just your practice in there. Now, I've got a video showing people how I use this for my orientation, and training. And for my ongoing stuff inside of my practice, in my loom room, and that is going to be one of the links on the show notes page. I'm not gonna take you through all of it right now but what I would tell you is that being able to put together. Here's the FAQs here are things that people frequently. Ask us that my supervises or my interns or my employees frequently ask me putting together something on that page so that people can go check the FAQ before they come and ask you for help. We'll help decrease your your being the bottleneck in your business.

Dr. Tara Sanderson: The Internet is one of those places where like it's such a great idea and it's so fantastic especially during orientation and training, but there does come some problems on going because it's really not a place where people regularly go to for things eventually. I mean, I would love for it to be like the hub of my practice where when people log in like, that's what they see first and then they go to Gmail and then they go to other things but Gmail's really, not built like that. So just a side note that like, it may not end up being your end. All be all, but having it be the place where people can really go to get their information is great. That's kind of it really Internet part of it. I definitely would encourage you to watch that loom video on it though because it is pretty fantastical. If you would like help in developing your own Google site, I would love to consult with you on it. There's a link to the To consult with me on the Show Notes page as well.

Dr. Tara Sanderson: All right. Next we're gonna talk about Google Meet and Google Voice. I use Google meet for my meetings, with my team, for our didactics for a lot of supervisions, for a lot of different things. And one of the things that I really love about Google Meet, is that it gives you the opportunity to use a lot of functionality that can help people who may have difficulties in a lot of ways. So it has closed captioning. It can create transcriptions, it can help to alleviate some of the pressure of like being here all the time. If, if people need to take care of themselves, that's one of the things I love about our didactic is, It is a required activity and if you can't be there, my expectation is that you do watch it and you get gain that knowledge. So we tape all of our didactics and they are they are attached to the calendar on the date that it is. So you don't even have to try. And remember what have we talk about that day and go search for it in the folder? It's just I know I miss the meeting on the 13th so I go and I watch the video from the meeting on the 13th or

Dr. Tara Sanderson: If for whatever reason you can't watch the whole video, you can see the transcription of it and you can kind of catch all of the stuff that you're missing in that place of it which is kind of nice. The other thing about Google me is we use it as a backup to our simple practice.

Dr. Tara Sanderson: For our telehealth videos. So sometimes simple practice goes down or sometimes the videos, Wonky, or whatever. So Google Meet is already built into our system. It's already in the circle within our BAA and within our HIPAA coverage. So we are able to then use that as our backup system. A

simple practice is not working for whatever reason. The other neat thing about that for supervision is even if we are using simple practice as our video recording system, I can have people tape their suit tape their sessions with clients within Google Meet and again it stays inside the circle because when we tape inside of Google, meet it goes straight to our Google drives. So it's all inside the circle. And we're able to see that video a lot faster than a supervisee having to tape it from somewhere else, and then upload it. And then we have to worry about all of those other shenanigans. So, it's a really nice way to be able to have quicker access to videos. If you're able to do video taping in,

Dr. Tara Sanderson: Practice. I super love it, too because it also gives me the opportunity to sit in on sessions if I can. So if there are clients that a supervising wants me to join in on or do whatever, if we move it to Google meet, I'm able to sit in on them and see what's going on and do a little bit more live supervision and stuff so that that makes it pretty cool. Google Meet has also integrated all across the Google workspace world. So if you're in a maybe a Google Doc and you're working on it with a supervisee, you can add in Google Meet right as you're working on that document, you can just click a button and invite the other person into it. And next thing, you know your video chatting while you are working on that document which is so cool.

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Dr. Tara Sanderson: So Google Meet has got some great opportunities. The last thing I'm going to talk to you about in Google Workspace that I think is really important is Google Voice. So Google Voice is an additional service that you can add on to your Google workspace.

Dr. Tara Sanderson: And I will, I will say that at the beginning, I did not talk about Google Workspace, being the paid version but it is totally a necessity for Google Workspace. To be the paid version, especially the paid version that has access to Google Vault. If you're going to have employees or supervises, be a part of your practice. If you want more information on that please, please do a consult with Person-centered Tech who can walk through the all of the pieces of the HIPAA guidelines of why this is important. But if you're gonna just trust me on this, trust me on this that you need a paid version that has access to Google Vault. Now, let's talk about Google Voice, Google Voice, you can use as your phone system for your practice and you want to make sure that it's a paid version. And you want to make sure that's a paid version, that connects to Google Vault because then everything you're supervises, type text, call. Anything are all logged into that vault. So that, if at any point is supervisee,

Dr. Tara Sanderson: Sides are going to be super helpful and delete all their text messages or, you know, their phone get stolen, or whoever knows whatever else you've got, all the information, kind of settled inside of the circle without needing any other access to their documents, or to their technology.

Dr. Tara Sanderson: So you want the paid version, you want the paid version, that connects to vaults, and you want to make sure that everybody in the team has, has some understanding of how to use it. So, one of the things that you don't want to do is you don't want to connect your contacts to Google Voice. And that's a really important factor because we don't want there to be any. Like, I don't know, whether I want to call it cross pollination, but we don't want any of those, like, funky little crossing places where maybe a client's name shows up in a contact list, or whatever and a spouse can see it or anything like that. We want it to be really clean and really clear. So, we don't want those contexts to go in there. Now, you can use Google Voice in two ways. One is just through the computer, you don't have to have it as an app on your phone or two as an app on your phone, I personally have it as an app on my phone because I am. I'm

Fielding calls not only from my team but from that, from my clients, and from other supervises. So I like to keep it pretty close to me on those pieces but I have a lot of supervises.

Dr. Tara Sanderson: Employees who just use it as the, the Web-based browser version because then they don't have to feel like they are on call all the time when that's not a part of our practice and a part of what we do. So that is a really kind of cool feature for Google Voice. So when I'm looking at the Google Voice, Web-based app, one of the things that I notice is that you have the option to call from here, text from here, kind of set up everything through here, which is really great. And I think that one of the cool features of using a VoIP, the Voiceover Internet protocol is that when you go to the settings, you have the opportunity to create several voicemail greeting. So I have one that's like regular with the days that I'm working and I have one that's like, I'm on vacation and I have one that says, You know, if this is an emergency, please do this and, and different pieces, so that it's a really quick back and forth to be able to

Dr. Tara Sanderson: Gate, the voicemail when I get ready to go on vacation or when something changes in my world. So that's kind of a cool feature. Now, I will say, here's the top tip. Make sure that when you have new folks, starting that you help them record several of those voicemail greetings. So that when they do go on vacation, it is not hard to go and make those changes to set their voicemail to do not disturb to set it to their own vacation and to make sure that their email is set to vacation responder so that everything gets where it's supposed to go. So that's a top tip. Have them do that when they first come on how'd that be part of their onboarding tasks?

Dr. Tara Sanderson: The other cool thing about having Google Voice as a part of your practice is because it's connected to an email in your system. You have a lot of opportunity and I don't want to say control but control over a lot of the things that go on with that piece of it. So when you go into your admin settings, you can set up something, called a phone tree, You can have an auto attendant, you can decide who gets a voicemail or I mean, a Google Voice setting or not. You get a lot of options on how to do those pieces. And if you're interested I would love to be able to set up a, or to set up an episode of this where I talk just about Google Voice in those options. Because I do think that a lot of people get scared of how to get in there and do those admin things. So,

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Dr. Tara Sanderson: Who I feel like I just told you everything in its brother about Google and I could probably tell you a ton more, totally feel free to watch the video inside of my loom room about Google Workspace about how I use it in a different ways. Make sure that you are thinking through some of the HIPAA angles, as you are deciding some of those pieces.

Dr. Tara Sanderson: Today's takeaways, after all of those tasting morsels that I just fed you today's takeaways. Number one, double check before you use. Google puts out new stuff all the time and some of it is super cool. The most recent one that they put out, that I really, really wish was a thing, was they put one that said toggle multi-send mode. So this makes it to where each person gets a separate copy of the email using a unique unsubscribed link, which supposedly was gonna make it to where, instead of it just being like and a non-descript who is this too, because you put everybody in the BCC line. Now, you can set it to be like every person gets their own email and so, it doesn't look like it's a giant group email even though it totally still is.

Dr. Tara Sanderson: Um, Unfortunately, this does not save us from the issue of HIPAA breaches or HIPAA and security stuff. So, that's a bummer. But I looked at that and thought, Oh my gosh, that's gonna be amazing, but it doesn't quite work for us in the way that we would like the other cool thing that they had

given us access to was the new layout. So you can kind of create a little newsletter kind of pop-up thingy which actually is great and you can totally use it. I would just recommend that if you're going to use it for mass mailings that you make sure to double check what who's on your list to be able to do that, and make sure that you understand the functionality of it. First, I use this sometimes for my internal stuff. So if I'm writing a message to everybody about a new thing that we're doing or grant, we got or a announcement of some kind. This gives me some ways to make it look kind of pretty inside of Google because everybody knows pretty emails, get red.

Dr. Tara Sanderson: But as new stuff comes out, you'll want to double check to make sure that it is appropriate for you to use. One of the ways that I do that is I use Person Center tech in their membership package, they offer a weekly office hours where they answer questions and walk through, practice technology, issues. And all of the new things that are out there, I have a link to the person-centered tech office hours and membership requirements on my website. So, please feel free to check them out if you, if you need any more information about like, Well, how does it really work? And what do you really get? Please feel free to ask. I'm happy to share.

Dr. Tara Sanderson: The second thing the second takeaway that you're gonna have today is to make sure that you have gone through the HIPAA security manual for Google. I know I said it already, I know that you already know it but by gum is, You know, I know that people won't do it, but this is the one that you really need to make sure that you have everything set up appropriately if you're using Google Workspace. So I have a link on the website for the HIPAA manual as it is right now I'm gonna try and keep it updated. Sometimes they change it and then if you do need help, going through this, I did put a link to scheduling a consultation with me and I'm happy to go through it with you and figure out what ways I can support you in that. All right, folks, that is it for today. If you're interested in being a guest on the show or if you have questions you'd like, answered, feel free to drop me a line on my website, and we'll see y'all next time.

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