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**Cardinal Hope Mental Health
Counseling Services PLLC.
Achieves Success with TheraNest**

Executive Summary:

TheraNest is a Practice Management Solution (PMS) designed by therapists for therapists. Our Electronic Health Record (EHR) software was created to provide mental and behavioral health practitioners with everything they need, all in one place. Solo practitioners and startups often juggle multiple jobs like administration or billing in addition to clinical work, so every tool needed to run a practice must be accessible and easy to use. In addition to startup pains, new agencies need to scale and grow at their own pace.

Ashley Williams, a licensed mental health counselor in Syracuse, NY, experienced these challenges firsthand when she created her practice, [Cardinal Hope Mental Health Counseling Services PLLC](#). As a solo practitioner specializing in couple counseling and anxiety, she needed a practice management solution that included everything she needed to run her startup business without being so financially prohibitive that she would break her budget. And while her business was just getting off the ground, Ashley was already thinking about the problems she might encounter while her practice grew.

Ultimately, she picked TheraNest, as it was the most cost-efficient solution. With TheraNest, she could stay within her budget, even after adding new employees once Cardinal Hope got more clients. Ashley saved much-needed time on billing and documentation, which was essential since she ran her practice all by herself. She quickly saw the potential of telehealth in improving access to mental health services and reaching more clients.



“Overall, I’ve seen a lot of areas where I’ve been able to save time, money, and help grow my practice with TheraNest.”

Small Practice, Big Heart

From the beginning, Ashley Williams was passionate about helping others. Encouraged by her family, she decided to become a licensed mental health counselor. She received her Bachelor’s in Applied Psychology at Morrisville State College. She then went to SUNY Oswego, where she completed her Master’s Degree in clinical mental health counseling and obtained her Advanced Certification in Trauma Studies.

With her qualifications in hand, Ashley interned at a private practice named Ray of Light with owner Angeleta Boyce before becoming a clinical supervisor at the same practice, which used TheraNest. She decided to start her own practice in September 2022. She named it Cardinal Hope Mental Health Counseling Services PLLC, after her grandfather, who had passed away. Ashley explained that she wanted her practice to embody her grandfather’s values, particularly his kindness and helpful nature, to support clients starting their therapeutic journey. Her practice is small but growing very quickly. As of this writing, she has an intern and is searching for a second employee.

Cardinal Hope Mental Health Counseling Services PLLC focuses primarily on anxiety and couples counseling, as Ashley is a certified clinical anxiety treatment provider and level two trained in Gottman theory modalities.

“As a black female business owner, I just wanted to say I greatly appreciate TheraNest and its impact on my business.”



Challenges

Ashley needed a digital solution to save as much time as possible. As a solo business owner, time was of the essence. While she fully intended to dedicate herself to her practice, she also understood the importance of a life outside of work. Her previous experience with TheraNest helped her realize the impact of a digital solution on her workload. She started shopping around and signing up for free trials of various EHRs.

“Going digital allowed me to save more time to prioritize myself and other aspects of my life, self-care time with family, and also still being able to get things done that I needed to do, but not being as time-consuming.”

And, of course, she needed a HIPPA-compliant platform. TheraNest’s BAA agreements were perfect for her needs.

Managing Startup Costs

It’s essential to create a solid foundation when starting your business, but most private practices don’t start seeing regular clients and making money for some time. Lack of a business plan and a lack of understanding of the financials of a business are the main reasons private practices fail. Ashley had to bankroll her practice, including initial costs. “You want to make sure that you are allocating your funds appropriately and within your budget,” explains Ashley. In addition, you have to spend a lot of money to get started, and additional expenses like lawyers or employee handbooks add up quickly. Building the foundation of a private practice and making sure it can function on the day-to-day is expensive. Ashley knew she had to save as much money as possible without skimping on quality.

While Ashley started as a solo practitioner and business owner, she always intended to grow and take on staff later. That impacted her decision when searching for the right practice management solution. “I often worried about when I did start growing my practice, how much that would cost me later down the line as well, because I also want to make sure that I’m keeping the money flowing within my practice as well.”

Solo EHRs were too basic for her needs, while group solutions had expensive initial costs. Some seemed to have accessible pricing, but adding another clinician would greatly increase costs. Overall, these systems did not suit her financial needs.

She investigated TheraNest and found the startup cost affordable for her private practice. When she



investigated the long term, she found that she could maintain the cash flow she wanted after adding clients or new therapists to her system.

Breeze Through Billing

The words “insurance billing” give most therapists a headache. Ashley knew from experience that private practices spend a lot of time on billing because of insurance and credit card charges. Providers can lose up to 20% of their practical income due to flaws in the billing process, so it’s something that needs to be perfected quickly. And while billing is essential, every hour spent arguing with insurance companies is another hour you can’t spend on billable services.

Ashley says that by using TheraNest, she didn’t have to stress about spending too much time getting billing done. It’s relieving not to worry about a vital part of her private practice. “And I’ve noticed that it takes me less than an hour to get through all my billing. It’s really as simple as two or three clicks. And then I’m done with my billing, which is great and good for me.” By cutting the amount of time she spends on billing, Ashley can care for more clients or take some time off to spend with her family. And since billing takes less time, she can slow down and make sure her billing workflow is error-free. She gets paid on time, which ensures her practice’s cash flow isn’t disrupted.



Speed Up Documentation

Documentation is inescapable, and no one knows that better than mental and behavioral health practitioners. And while documentation isn’t Ashley’s favorite part of a private therapy practice, she found helpful functions with TheraNest. She wanted to ensure her EHR could store all her client’s information in a single place to make navigation easier. She was concerned that putting documentation on different platforms would make navigation overwhelming, especially after taking on additional clients. Disparate information sources can lead to more time spent looking for information, clients falling through the cracks or data not communicating efficiently.

Ashley saves a lot of time by using templates for notes, treatment plans, intake forms, consent forms, travel, and other documents already built-in the system. She can tweak the templates, which takes less time than creating documents from scratch. “The treatment planning and note setup takes the dread out of documentation!”

Even initial documentation wasn’t bad: “So I really spent maybe again half an hour when it came to my initial

documentation that I was setting up in the system because all I had to do was put my business information in and then it was completed. So I didn't need to draft up specific documents, which saved me so much time.”

Ashley often copies and edits notes as needed. She finds the ability to carry notes and treatment plans over and make adjustments as needed to be especially helpful. She spends less than an hour, and reviewing her intern's documents is just as easy. “So it makes it just a dream as a new business owner.” Ashley also uses the client portal, which she finds very streamlined, to message clients securely, then copies and pastes messages into clients, charts, notes, treatment plans, and other intake documents to decrease the time spent on paperwork. This also helps to keep notes current and can reduce miscommunications.

As someone who works remotely and often conducts telehealth sessions for clients throughout the state of New York, Ashley found TheraNest makes sending documents, getting signatures, and going through the intake process much faster and easier. And it's a better experience for the clients, who can quickly fill out paperwork and start treatment sooner.

Bridging the Gap with Telehealth

Ashley believes Cardinal Hope Mental Health Counseling Services PLLC is able to grow so quickly thanks to telehealth. By using remote services, she can reach people throughout the state of New York. She started using telehealth to work remotely to spend more time with her family and to improve her work-life balance. Burnout is a real problem in this field, particularly for therapists of color. Between skipping breaks to get more work done or managing too many cases, providers often feel that all they do is work. By using telehealth services, therapists can skip a lengthy commute or make sure they can spend time with their loved ones even with a complicated schedule. By eliminating her commute, Ashley is able to serve clients she might not have been able to reach before.



Using telehealth also opened a new avenue for Ashley: “And then I quickly realized into my telehealth service work that allowed me to connect with others of a diverse background throughout the state of New York. I'm servicing in more populated towns in Rochester, Syracuse, New York City area, Long Island.” This allowed her to reach a wide array of clients and build connections beyond her local practice. She provides services for people who may not have been able to find a clinician of color or get transportation for an in-person visit. It's also helpful for people who might have multiple jobs and deal with school or child-raising, where gaps in their schedule can be difficult to predict or fill if they have to drive to a physical space.

Ashley is very vocal about her experiences as a young African American woman, an entrepreneur, and a clinician in the field of mental and behavioral healthcare. Another reason she was able to grow her practice so quickly is because of the lack of clinicians of color. While she believes the situation has improved and that the conversation regarding diversity is no longer taboo, Ashley maintains that we can do more to open the gates of mental health for minorities. She noticed that by using telehealth, she could connect with a more diverse population than if she had just provided in-person services in the Syracuse area. “So I think the online use of platforms and services really helps to connect more out of our typical range of clients.” Building that diversity is part of her practice’s mission.

Reflecting on TheraNest

After more than a year has passed, Ashley says that adopting TheraNest was the easiest decision she has made and has really helped her practice grow. It has simplified the process of starting her own practice, has taken a lot of stress away, and lifted a burden off her shoulders.

Ashley loves TheraNest because it takes the hassle out of her daily work. No need to figure out charts; everything she needs is accessible with a few clicks. Scheduling clients is very simple. She finds it straightforward, giving her plenty of time to focus on everything she needs to do within her business. In addition, because it’s so easy to use, she won’t have to spend very long teaching new staff how to navigate the platform.

TheraNest helps Ashley stay organized by making it easy to manage her remote staff, appointments and billing efficiently.

“And so I’m really appreciative of how TheraNest has not only allowed my practice to grow but also streamline the process for my clients. [...] It really has overall saved me time, money and improve time for myself as a business owner.”

Ashley’s Advice for Private Practitioners

“One of the main things that I would give an offer as a piece of advice for other clinicians of colors and also female clinicians is continue to be true to yourself, know your worth and stick to that. Don’t waiver on it and just go after it and stay on the track that you want for yourself. Don’t feel as though you need to waiver or alter your career choices, especially because of maybe the pushback that you may be receiving from other people.”

Ashley also recommends networking. She has a personal consultation group where she meets with fellow therapists she’s built relationships with to check in, get support, feel empowered, and ask questions. That way, she can continue to grow, and so can they. She recommends attending networking and professional events because they allow individuals to connect with an array of people they may not have had access to. Ashley states that this is key to developing your practice and professional development.

Ashley also has some advice for clinicians looking to implement practice management software. She says you should look for an EHR that supports and streamlines the documentation process since documentation is one of the main things therapists focus on outside of one-on-one direct contact with clients. Documents should be easy to fill out, access, and navigate because, as mentioned before, time is of the essence for a therapist. Your EHR should reduce stress by helping you with your private practice and giving you additional time to focus on other aspects of your practice. And of course, think long-term: will this solution work for you in 5 years or with additional clinicians? Look for software that supports your practice and your work habits.



“[With TheraNest] I have saved money significantly because the initial pricing was affordable. And as I have grown my practice and added additional clients, additional therapists into the systems, there hasn’t been much changes for me price wise. So I’m allowed to grow but also isn’t hurting me financially, which is a big piece to thriving in private practice.”

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