Introducing PracticeVital

Guide for Supervisors/Clinical Directors

Why are we using PracticeVital?

PracticeVital is a software tool we are implementing to help us gain a better understanding of how the practice is doing, what's working well, and where we need to make improvements. We'll use the data from PracticeVital to better inform our discussions and as a way to provide more targeted coaching to our clinicians.

As a supervisor using PracticeVital, your primary focus is supporting your clinicians by helping them understand their performance metrics. Approach the data with curiosity. Much like a traffic light, yellow or red indicators signal 'slow down or stop and pay attention' or areas worth exploring. Numbers that stand out often hint at challenges in client care, lack of therapist skill, or even simple administrative oversights. Understanding these trends allows you to provide more targeted and meaningful supervision.

For example, if a clinician has a high churn rate (indicated in red), it may mean they are receiving clients outside their scope, such as PTSD cases when they lack trauma-specific training. Being aware of this issue early can guide you in providing tailored support—whether it's further training or adjusting referral criteria. A clinician who doesn't feel successful in helping their clients can feel frustrated and at risk of burnout, so improving churn can significantly impact their job satisfaction and client's success in treatment.

Small changes often yield big results. For instance, many clients start therapy without understanding how the process works—how many sessions they'll need, how frequently they'll attend, or what the goals are. Simply coaching clinicians on how to explain these aspects early in treatment can significantly improve retention and client outcomes.

How can you benefit from using PracticeVital?

- **Offer Targeted Supervision by Looking at Big Picture Trends:**
  Create an intentional agenda for your supervision time with clinicians. With PracticeVital, you can use data to offer more targeted coaching based on specific trends. For instance, if a clinician is struggling with a high cancellation rate, you can address this by sharing tips to reduce cancellations and help them see the connection between cancellations and client retention. By strategizing around these trends, you can guide clinicians to make impactful, meaningful changes that benefit both them and their clients.

- **Set Goals, Track Progress and Celebrate Wins**
  Use PracticeVital to create concrete goals with your supervisees. Track progress toward goals around client retention or note completion. Recognize milestones to keep morale high.

- **Monitor Performance for Bonuses and Advancement**
  Check if clinicians are on track for their next promotion, bonus, or advancement. Data in PracticeVital allows you to guide them on how to meet those milestones.

- **Improve Client Engagement**
  Use information about retention, cancellations and rebooking to assess whether clients are fully engaged or if adjustments are needed. These insights help ensure clients stay on track to meet their treatment goals. Spot patterns in cancellations or no-shows and guide clinicians to make changes that improve client retention and engagement.

- **Easily Stay on Top of Administrative Work**
  Easily track overdue notes and work with clinicians to manage their administrative tasks efficiently. Celebrate when they hit zero!

- **Manage Caseloads and Scheduling**
  Monitor upcoming bookings to ensure clinicians are meeting scheduling targets. Check their cancellation rate to know how many bookings each clinician will need to schedule to account for their typical number of cancellations.

- **Identify Patterns that May Lead to Burnout and Offer Support**
  A high churn rate can be indicative of a clinician struggling to connect with clients and this can be both a symptom or a cause of burnout. Another metric that can be tied to burnout is utilization rate. If a clinician is consistently exceeding their utilization goal and their churn rate is high as well, this may be a sign that the clinician is at risk of or already experiencing burnout.

How can your clinicians benefit from using PracticeVital?

- They can easily determine when it makes most sense to take a vacation, whether they're on track to hit a performance bonus or raise or how much they're projected to earn this year

- Ensure they have enough intakes and are scheduling enough appointments to hit their weekly session goal

- Track their daily, weekly, monthly progress and celebrate when they've hit their goals

- Learn what they can do to better support their clients, and help them become more "bought in" to the work they're doing

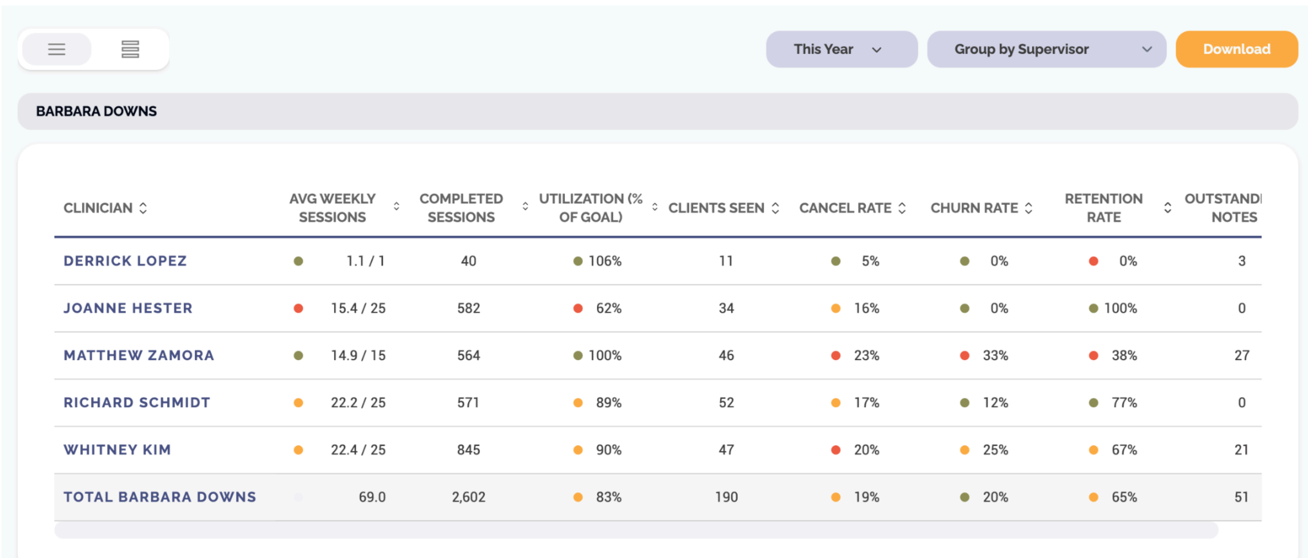
- Watch their overdue notes go down and feel the ping of dopamine when they hit zero!

Navigating PracticeVital as a Supervisor

As a supervisor, you'll spend most of your time in the following pages:

Clinician Metrics Page

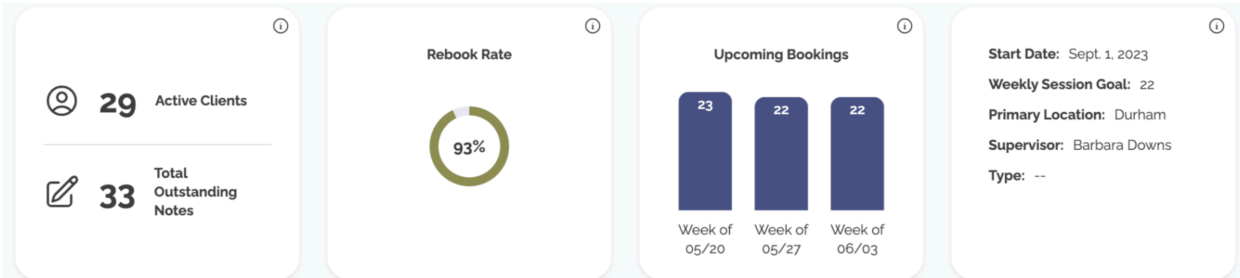
- Group clinicians: You can group clinicians by supervisor to see your whole team of clinicians in one place. Look at the row at the bottom where it says "total" and your name. This will show you the totals or averages across your team of supervisees. In the example below, Barbara Down's team has a 65% retention rate and has a total of 51 outstanding notes.



CLINICIAN	AVG WEEKLY SESSIONS	COMPLETED SESSIONS	UTILIZATION (% OF GOAL)	CLIENTS SEEN	CANCEL RATE	CHURN RATE	RETENTION RATE	OUTSTANDI NOTES
DERRICK LOPEZ	1.1 / 1	40	106%	11	5%	0%	0%	3
JOANNE HESTER	15.4 / 25	582	62%	34	16%	0%	100%	0
MATTHEW ZAMORA	14.9 / 15	564	100%	46	23%	33%	38%	27
RICHARD SCHMIDT	22.2 / 25	571	89%	52	17%	12%	77%	0
WHITNEY KIM	22.4 / 25	845	90%	47	20%	25%	67%	21
TOTAL BARBARA DOWNS	69.0	2,602	83%	190	19%	20%	65%	51

- Draw comparisons: Easily compare performance across all clinicians, or group by primary location or supervisor team for a quick read on how your team is performing.
- Celebrate what's going well: Use the column sort features to organize by top performers according to any metric. Find ways to celebrate or reward these people in your practice to help motivate and retain them.
- Identify areas to intervene: Sort by metric to identify which clinicians are struggling in certain areas. These people may need additional coaching or training to help them make improvements. Share PracticeVital blog posts with clinicians to help offer them strategies to improve.
- Check for outstanding notes: Quickly sort by Notes to see which team members are struggling with note completion.

Individual Clinician Pages



- Spend time familiarizing yourself with each clinician's data before introducing it to supervisees. These pages contain crucial insights into how they are doing, and understanding them will allow you to have meaningful conversations with your supervisees.
- Consider sharing your screen during supervision to walk them through their page of metrics. Once both of you are comfortable with the numbers, you can opt to download and email individual reports using the "download" button as needed.

Why each metric is *vital* to track:

Active clients:

This number shows the clinician's caseload over the last 60 days, not just the roster in the EHR. Typically, a clinician needs an active client count of about 1.8 to 2 times their weekly session goal. For example, if a clinician's target is 20 sessions a week, they'll need around 38 *active clients* in order to ensure they have enough clients to hit their weekly session goal given cancellations, terminations, and clients who come infrequently. .

Rebooking Rate:

Allows us to account for clients. If low, it may mean we have a high number of terminations. If high, we know our current clients are committing to showing up regularly, and the intake team will scale back on assigning you new clients.

Ensures clients aren't slipping through the cracks. If there is no follow up appointment scheduled, it's easy for clients to let several weeks (or months!) go by without a session. Weeks without a session interferes with the momentum needed to make progress towards goals.

Upcoming Bookings:

Check out the upcoming bookings to know how sessions are trending and to ensure clinicians are scheduling enough sessions to meet their productivity goals.

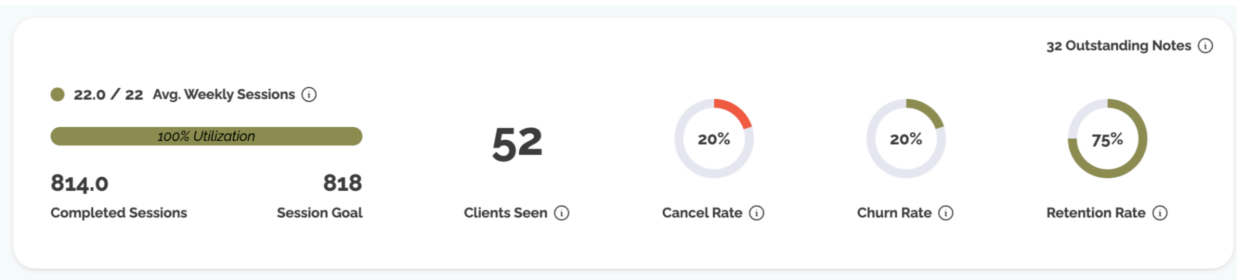
Use this number in combination with cancellation rates to know how many additional appointments are needed in order to meet your practice wide session goals.

practice vital

Utilization Rate:

This is another way of looking at the average number of weekly sessions but as a percentage. So if the goal is to complete 22 sessions per week, and a clinician is averaging 20 sessions per week, their utilization will be 90%.

Review weekly to ensure clinicians are meeting their session goals. If utilization is low, explore whether clinicians may be receiving too few referrals or struggling with low retention or a high % of cancellations.



Cancellation Rate:

High rates may indicate poor client communication or ineffective reminder systems. Addressing these early can improve overall scheduling efficiency and client commitment.

Checking cancellation rates helps us determine the amount of additional sessions we need to schedule in order to account for cancellations.

A high cancellation rate may indicate low client and/or therapist engagement. If a therapist has a high cancellation rate, it may signal they're struggling with burnout or that other areas of their life are interfering with their ability to fully "show up" for their clients.

Retention:

Retention rate looks at the percentage of clients, within a given time frame, that stay for 8 or more sessions.

Research defines, "minimally adequate treatment," or the minimum number of visits to achieve beneficial outcomes, to be 8 or more therapy sessions. In other words, clients need to have eight therapy sessions, at a minimum, in order to achieve their goals.

Check whether clients are staying for the recommended number of sessions (e.g., 8 or more). If retention is low, work with clinicians to ensure they are clearly communicating therapy goals and benefits early on.

If retention is high, it signals a strong therapeutic relationship, positive client engagement and satisfaction with the work

Retention can also point to patterns of client dependency. There's an ideal space between "too few sessions to make progress" and a client who stays in therapy forever

Churn:

Churn is defined as the % of clients who terminate before their 4th session (so they only stay for 1-3 sessions)

High churn can indicate poor client-therapist matches or ineffective initial sessions. If churn is a recurring issue, it might also be a sign of clinician burnout. By addressing this early, you can help clinicians feel more supported and improve client outcomes.

A high churn rate may indicate a poor fit in terms of the clients that are being assigned. Explore trends with clinicians who have a high churn rate to make sure you're making optimal matches or to provide additional clinical training to better match the presenting issues of clients that are being assigned.

How to Help Your Team Embrace PracticeVital: Talking Points for Supervisors

Data is our friend: PracticeVital's data is here to ensure our practice thrives. It helps us provide the best possible care to clients and supports the growth of each clinician.

- Ensures Continuity of Care for Clients:
  High cancellation or low retention rates are signs that clients may not be getting the full benefit of therapy. With this data, we can identify areas for improvement and ensure we're offering the best care possible.

- Keeps Caseloads Balanced:
  The data helps flag when therapists need more clients or when outreach needs to increase. This way, we can keep everyone's caseload full and running smoothly.

- Identifies Trends to Support You:
  The data may reveal signs of burnout or mismatches between clinicians and their clients. If retention is low or churn is high, we can explore whether the right clients are being assigned to your caseload, or if additional training might help.

- Sustains Our Practice:
  Using data helps ensure we're running a sustainable business, allowing us to grow and continue helping people long into the future.

- Empowers You with Insights:
  Having access to your own data gives you the power to make informed decisions about your practice. You deserve to know what's working well and where adjustments may be needed.

- Provides Clarity in a Unique Field:
  Unlike many other industries where performance is easily visible, therapy often happens behind closed doors. This data gives you clear insight into how things are going, allowing for open communication and reflection.

- Offers Targeted Support:
  The data provides specific strategies that can help you better support your clients. By seeing what works and what doesn't, we can continuously improve our services.

- Helps You Plan Ahead:
  The data can help you plan your schedule, project your income for the year, and ensure you're on track for bonuses or raises. It also makes it easy to see when it's a good time to take some well-deserved time off.

- Eliminates Surprises:
  By keeping an eye on trends, we can address issues before they become problems. This means no surprises during annual reviews or unexpected performance improvement plans.

- Celebrates Wins:
  The data allows us to recognize your achievements—whether it's keeping your notes up to date or improving client retention. For example, "Last month, you had 10 missing notes, and this month they're all complete. Great job!"

- Helps Set and Achieve Goals:
  Data helps us set clear, attainable goals. It's rewarding to know when you're meeting expectations and seeing the positive impact of your efforts.

- Improves Client-Therapist Matches:
  Retention data can help ensure we're making the best matches between clients and clinicians, which ultimately helps reduce burnout and increase job satisfaction.

- Increases Our Impact:
  The more we understand and act on this data, the more people we can help. It enables us to be more effective in the work we do and ensure we're making a real difference in the lives of our clients.

By embracing the data, we're creating a culture of growth, transparency, and support that benefits clinicians, clients, and the practice as a whole.