PracticeVital Work Flows

1. Soon After Onboarding

- [ ] **Set Annual & Weekly Session Goals**
    - [ ] Determine your target number of **completed sessions per year**.
    - [ ] Break this annual goal down into a **weekly completed-sessions** target.
- [ ] **Establish Weekly Bookings Target (practice)**
    - [ ] On the Practice Dashboard, note your **practice-wide cancellation rate**.
    - [ ] Calculate how many **weekly bookings** you must schedule to hit your completed-sessions goal.
- [ ] **Establish Weekly Bookings Target (per clinician)**
    - [ ] For each clinician, use their **individual cancellation rate** and **weekly completed-session** goal to determine their **weekly bookings** target.
- [ ] **Review Retention and Churn** data for the past 12 month time period (practice)
    - [ ] Set a goal to improve retention by 2-5% over the next 12 months
    - [ ] Set a goal to decrease churn by 2-5% over the next 12 months
- [ ] **Calculate Client Lifetime Value (LTV)**
    - [ ] **Practice-wide LTV** = (avg. sessions per client) × (avg. revenue per session).
    - [ ] **Clinician-specific LTV** = (clinician's avg. sessions per client) × (clinician's avg. revenue per session).

2. Weekly Workflow

- [ ] **Team Maintenance**
  -Have any new clinicians joined the team? if so, add them in Settings.
  -Have any clinicians gone on leave or made changes to their **session targets?** Update the clinician's information in settings. Consider adding in a different "goal period."
- [ ] Orient new team members to PracticeVital
- [ ] **Review Documentation**
  Look for **overdue progress notes**; notify clinicians.
- [ ] **Bookings & Capacity**
  Compare **actual weekly bookings** vs. your **weekly bookings target**.
  For each clinician:
    -Review **upcoming bookings** for the next week.
    - If bookings < expected completed sessions, then:

Encourage clinician to schedule more, or adjust their calendar availability,
Or add them to your “clinicians with openings” list.

- ☐ **Review data for clinicians who onboarded within the last 90 days**
  Open the Clients Report, filter to **the new clinician**
  - ☐ Assess intakes and re-booking rates: Have they re-booked all initial clients? If not, reach out.
- ☐ **Caseload Review**
  -Review each clinician’s # of **active clients**.
  - Ideal baseline ≈ 2× weekly session goal (e.g., 20 sessions/week → ~40 active clients).
  - If below baseline:
  1. Review **churn & retention** status (red/yellow indicates client loss).
  2. If retention is healthy, clinician likely needs **more referrals**.
- ☐ **Performance Review**
  - Practice-wide **completed sessions** for the past week.
  - Clinician-level **utilization**: flag anyone under-performing.
- ☐ **New Client Follow Ups**
  - **Reach out to clients who completed an intake in the past week**

3. Bi-Monthly Workflow

- ☐ **Payroll Calculations** (if using a flat hourly rate to pay clinicians)
  - ☐ Generate and review payroll data for clinicians and support staff.

4. Monthly Workflow

- ☐ **Intake & Retention Analysis**
  - Total **intakes** this month: compare to previous months.
  -Review the **Retention Report**:
  - Note average sessions per client (practice-wide).
- ☐ **Identify “at Risk” Clients**
  -Review the Clients Data Sheet:
  Filter by **Intake = last month**, **Retention status = any**.
  Sort by **Next Appointment**: identify clients **without** a future booking.
- ☐ **Hold 1:1 Supervision with Clinicians**
  - ☐ Meet each clinician to review their dashboard and set **new monthly goals**.
    - Prepare key insights ahead of each meeting.
- ☐ **Revenue Reconciliation**
  - Check the **Appointments Report** for **missing payments**:
  - From last month (or prior quarter, due to insurance lag).

5. Annual Workflow

- [ ] **Year-Over-Year Performance**
    - [ ] Compare current year metrics vs. prior years.
- [ ] **Compare Performance Across Groups** (Location, Supervisor, Type)
- [ ] **Determine hiring needs, bonuses, raises**
- [ ] **Strategic Goal-Setting**
    - [ ] Define **practice-wide goals** for the upcoming year.
    - [ ] Set **KPIs** for each role:
        - [ ] Clinical Director, Intake Coordinator, Admin staff, Clinicians.
- [ ] **Annual Performance Reviews**
    - [ ] Conduct **1:1 reviews** with every team member:
        - [ ] Celebrate wins, discuss growth areas, align on next-year objectives.