practice vital

PracticeVital "Expert" Guide

The Role of the PracticeVital Expert

Every practice should consider assigning a **PracticeVital Expert**—a point person who understands the tool, stays on top of changes and maintenance, fields questions from team members, and communicates with the PracticeVital support team when needed.

A PracticeVital Expert may take responsibility for:

- Keeping PracticeVital updated week to week.
- Anticipating adjustments as your practice changes (e.g., new hires, schedule changes, updated goals).
- Supporting your team in using PracticeVital effectively.
- Acting as liaison between your practice and the PracticeVital team.

This guide will walk you through **maintenance tasks**, **ways to make changes and updates**, and **questions to consider** so you can keep your practice's data accurate, reliable, and useful.

Orienting Your Team: Questions to Consider

Use these questions to align your team and clarify how PracticeVital will be used across roles.

1. **Access & Roles**
   - Who should have direct logins? (e.g., Clinical Director, Supervisors, Administrators, select clinicians, all clinicians)
   - What permissions should each role have?
2. **Training & Familiarity**
   - How will each user learn the tool?
3. **Information Sharing**
   - How often will data be shared or reviewed with clinicians?
   - Will metrics be in supervision, via download/email, via clinician direct access, or scheduled reviews?
4. **Communication Workflow**
   - Who should team members reach out to with PracticeVital-related questions? Should they reach out to their direct supervisor or to the PracticeVital Expert?
   - How should they communicate their questions?

Key Resources for Orienting Your Team

Leadership:

- PracticeVital in Action: Tips for Putting it to Use

Clinical Supervisors:

- Article: How to Get Clinicians Engaged with Metrics (Without Overwhelming Them)
- Guide for Supervisors
- Supervisor Checklist

Clinicians

- Guide for Therapists
- Video Orienting Therapists

Weekly Maintenance:

Each week, set aside 10-15 minutes to ensure your PV data reflects any changes or updates that have been made at your practice.

1. Team Updates

Have any clinicians joined or left your team? Have any clinician's weekly goals changed? Have any clinicians gone on family leave?

- **Adding or Removing Clinicians**
    - Action: Assign a weekly session goal, supervisor, location (if relevant) and clinician type
- **Updating Existing Clinicians**
    - Action: Edit clinician record if there are changes to any clinician's:
        - **Session goal** (e.g. family leave, part → full time, update to session goal during onboarding period). Use the "Multiple Goal Periods" feature.
        - **Supervisor**
        - **Location**
        - **Type** (e.g., part-time → full-time, LMFT → LCPC, etc.)

2. Access & Permissions

Has a new administrator, supervisor, CFO, or biller joined the leadership team who will need access to PracticeVital?

- **New User Access Needs:**
    - **Action**: Add new users and set appropriate permissions.

3. Services & Billing Code Updates
Have any new services, codes, or billing types been added in your EHR?

- **Service Updates:**
    - It's important to map all new codes as soon as you begin using them in your EHR as numbers within PracticeVital will be inaccurate if you are using services or codes in your EHR that have not yet been mapped within PracticeVital.
    - **Action**: When logging in to PracticeVital, click on the banner at the top of your screen that says "Action Required" then click "Contact Us" to send us an email.

4. Metrics & Settings (only needs occasional review)
To make changes to any of the following, please email support@practicevital.com

- **Metric Thresholds:** Review whether current benchmarks/thresholds (utilization %, retention targets, etc.) are still optimal for your practice.
- **Note Deadline**: Confirm that your notes deadline reflects current practice expectations.
- **Weeks in Year:** Make sure your setting matches your ideal number of weeks in the year. Some practices choose to adjust a year to 48 or 50 weeks rather than 52 to account for time off/PTO.

Tips for Success

- **Centralize Updates:** Keep a single "source of truth" where all practice changes are logged—whether staffing, new services, or clinician goals. A shared document or space allows everyone to communicate in one place, making it easy for the PracticeVital Expert (or designated point person) to quickly see what's changed and update PracticeVital most efficiently.

- **Join Monthly Meet Ups**: Every month we host a free 60 minute live Zoom meeting for practice owners or their leadership team to ask questions, learn from other PracticeVital users, and see live demos of new features and ways to use PracticeVital. We encourage you to attend every month to ensure you stay on top of updates and get the most out of the tool. Sign up via the link to receive a calendar invite and link to the meet up. Note: *You need to register each month to receive the invitation for that month.*

- **Download Guides & Worksheets**: Review and download our guides, worksheets, and resources for your whole team to use and embrace PracticeVital.

- **Use the Support Library**: Visit the support library with tips to help you navigate PracticeVital, announcements about our latest features, and answers to commonly asked questions.

- **Bookmark the Resource Center**: Make sure to regularly explore the resource center to ensure you don't miss out on upcoming meet ups, webinars, the latest blog articles and more.

- **Watch for Newsletter Updates:** Be on the look out for announcements from the PracticeVital team. Make sure you mark the dates for the next meet up and are up to date on new features and training opportunities.

Quick Reference: Short List of Support Articles

For step-by-step instructions, see these key support articles:

- Library of Training Videos
- Adding/removing clinicians
- Adding/removing users & assigning permissions
- Editing clinician categories (location, supervisor, type)
- Granting access to clinicians
- Setting/adjusting weekly session goals
- Setting up multiple goal periods
- Creating or editing groups of clinicians
- Adding or updating service mappings
- Setting up group access
- FAQs relating to metrics calculations
