

Introducing PracticeVital

Therapist Guide

Why are we using PracticeVital?

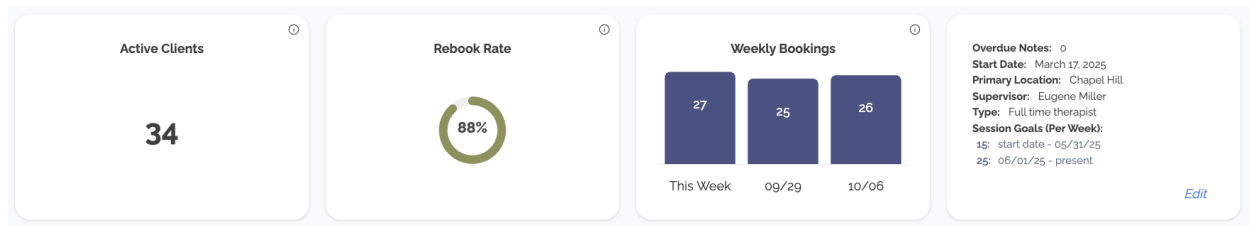
PracticeVital is a new software tool we are implementing to help empower you with a better understanding of how you're doing, what's working well, and where you can focus for improvement. We'll use the data from PracticeVital to better inform our discussions and as a way to provide more targeted coaching to you.

Understanding our data and tracking key performance metrics will help our whole practice function more efficiently and effectively. It will ensure our practice is thriving, and that our clients are benefiting, as much as possible, from engaging in therapy with us.

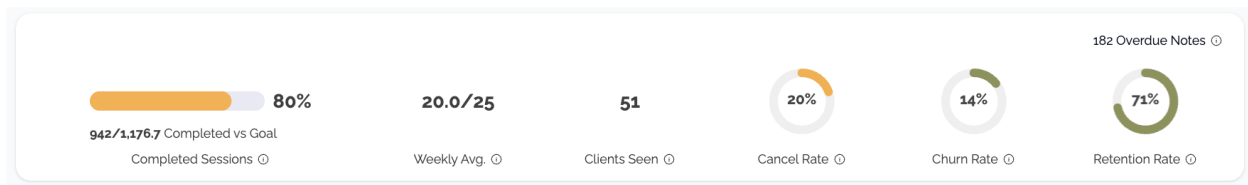
How can I use my PracticeVital data?

- Track progress towards your goals and celebrate when you've hit a new threshold or made a positive change ("I'm hitting my weekly session target, score!")
- Evaluate when or how much time to take time off in order to still meet your session goals and provide continuity of care to your clients
- Get a better sense for whether you're on track for your next advancement or bonus, or how much you're projected to earn this year given your current metrics
- Work with your supervisor to learn what you can do to improve your retention, churn and cancellation rates in order to optimize care for your clients
- Gain a better understanding on whether your clients are "bought in" to the work you're doing or if it would be helpful to make adjustments
- Watch your overdue note count go down... and celebrate when you hit zero!
- View your upcoming bookings to easily see how many more clients you might need to schedule in the coming weeks.
- Know how many of each type of session you've had over the past year (or whatever time frame you're curious to see). Easily see how many couples sessions, groups you held, or intakes you had.

Why is each metric *vital* to track?



- **Active clients:**
 - Gives a reliable count of active clients so our intake team has an accurate picture of your caseload.
 - Helps us prepare for additional clients needed. We may need to increase our outreach and marketing efforts if we see that you don't have enough active clients to hit your average weekly session target.
- **Rebooking Rate:**
 - Allows us to account for clients. If low, it may mean you have a high number of terminations. If high, we know your 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.
 - If you rebook with a client any time in the future, they will be counted as part of your rebooking rate.
- **Upcoming Bookings:**
 - Gives you an 'at a glance' view of the number of sessions you have coming up. You can easily see how many sessions you have upcoming and whether or not you need to schedule additional sessions to meet your weekly session goal.
 - You can use this number in combination with your cancellation rate to know how many additional appointments to book in order to meet your weekly goal. For example, if you have a goal of seeing 22 clients/week and you currently have 22 scheduled for the upcoming week and you have a 15% cancellation rate, you'll want to schedule an additional 3 to 4 sessions for the next week to account for likely cancellations.



- **Cancellation Rate:**

- Helps you determine the amount of additional sessions you'll want to schedule in order to buffer for cancellations. For example, if your goal is to see 20 clients/week and you have a 25% cancellation rate, you'll need to schedule an additional 25% (or 5 clients) to reach it
- A high cancellation rate may indicate low client and/or therapist engagement. If you have a high cancellation rate, it may signal to us you're struggling with burnout or that other areas of your life are interfering with your ability to fully "show up" for your clients. If this is the case, we want to know, and we want to find ways to support you.
- Allows us to track practice wide trends that inform scheduling and time off.

- **Retention:**

- Your retention rate looks at the percentage of clients, within a given time frame, that stay with you 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.
 - There are a few exceptions to this rule including shorter term therapy modalities. We have ways of excluding shorter term treatment protocols from your retention numbers so they won't skew your data.
- If high, signals a strong therapeutic relationship, positive client engagement and satisfaction with the work you're doing together.
- If low, may indicate a mismatch in the types of clients we're assigning to you. We'll explore trends with you to make sure we're making optimal matches.
- Points 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.

- Clients who are “retained” at 8 or more sessions are more likely to refer others to work with you due to meeting their treatment goals and having a positive experience.
- **Churn:**
 - Churn is defined as seeing a client for fewer than four sessions before they terminate.
 - Churn rate is known as the “revolving door” metric– meaning clients come in and don’t stick around.
 - If you’re frequently churning through clients, you won’t feel as successful. We all want to feel we’re doing good work and really helping our clients. A high churn rate will let us know we may need to match you with different referrals in terms of the clients’ presenting issues.
 - A high churn rate is correlated with therapist burnout. A protective factor for burnout is feeling good about our work and our ability to do it well. A high churn rate means we’re frequently terminating with clients before they’ve had a chance to meet their treatment goals – meaning we aren’t being effective in our work with them and we are less likely to feel good about the work we’re doing.