

PracticeVital

Metrics Glossary & Thresholds



Current Caseload - Definitions:

- **Active Clients:** The number of clients that have had a counted session within the last two months. Clients are considered active in the current caseload if they've had an appointment categorized as *Intake, Session, Evaluation and Testing or Billable Cancel* in PracticeVital in the prior 60 days. Group appointments are not included.
- **Rebook Rate:** Of the active clients, this is the percentage that have their next appointment scheduled.
- **Upcoming Bookings:** The number of bookings that are on a clinician's calendar for the next three weeks. You'll notice intakes are specifically broken out when you click the "i" pop-up.
- **Total Outstanding Notes:** The total number of sessions that have overdue notes, dating back to the earliest data available to PracticeVital. You have the option to see overdue notes from a more specific or recent timeframe in the "Key Metrics" section.

Key Metrics - Definitions:

- **Average Weekly Sessions:** The total counted sessions in that time frame divided by the total number of weeks in that time frame. Note, weeks are based on your preferred calendar configuration set in onboarding.
- **Completed Sessions:** The number of counted sessions completed for the time frame selected. Note, days and weeks are based on your preferred calendar configuration set in onboarding.
- **Utilization:** The percentage of completed sessions out of the clinician's session goal for that time frame. This percentage gives you a sense for how much this clinician is being utilized (or their general capacity) out of their target.
- **Clients Seen:** The number of clients that have had a counted session during this time frame.
- **Cancel Rate:** The percentage of scheduled sessions that were canceled and non-billable. Note, you can discover billable cancellations (i.e. no-shows, or late cancellations) broken out by code in the Completed Sessions Report or within the deep dive breakout for an individual clinician.
- **Churn Rate:** The percentage of clients with an intake during the time frame that stayed for fewer than 4 billable sessions. Note, churn is a metric that requires a longer time frame to calculate, as it takes time to see whether a client will continue to return. For this reason, churn has a grace period of 8 weeks to exclude clients with a recent intake. These clients may still return for more sessions.

- **Retention Rate:** This is the percentage of clients with an intake during the time frame that stayed for 8 or more billable sessions. Note, retention is a metric that requires a longer time frame to calculate, as it takes time to see whether a client will continue to return. For this reason, retention has a grace period of 8 weeks. These clients would not have had time to complete 8 sessions, and so are excluded from the retention calculation. Visit the Retention Report to view different session-levels for retention.
- **Outstanding Notes:** This is the total number of sessions that have overdue notes for this time period based on the note completion deadline defined by your practice. Visit Settings to check your notes deadline.

Metric Performance - Default Thresholds:

PracticeVital defaults to the following industry-informed thresholds for performance. You may adjust these metric thresholds based on your practice's preferred standards and expectations in Settings.

	●	●	●
Rebooking Rate	>85%	65% - 85%	<65%
Average Weekly Sessions	>95%	75% - 95%	<75%
Utilization	>95%	75% - 95%	<75%
Cancel Rate	<10%	10% - 20%	>20%
Churn Rate	<25%	25% - 40%	>40%
Retention Rate	>70%	50% - 70%	<50%