Supervisor Checklist:
Key Areas to Check on a Weekly Basis

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Use this weekly checklist to stay on top of your team's performance and guide targeted interventions to improve both clinician success and client care.
Pro Tip: Meet with supervisees monthly to review their individual page via screen share.

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Sort & Compare Info Across Clinicians or Groups of Clinicians

Click into "clinician metrics." Use sorting to spot trends across your clinicians (e.g., high cancellation rate or low retention). Click into individual pages to provide targeted coaching for those who need extra support.

Utilization Rate & Average Weekly Sessions

Review how many sessions each clinician is completing compared to their weekly target. For example, if a clinician's goal is to complete 20 sessions per week and they're only averaging 15, check their individual clinician page to investigate if the issue is due to low referrals, lack of rebooking, low retention or too many cancellations.

Cancellation & No-Show Rates

Keep an eye on high cancellation or no-show rates. If you notice high numbers (e.g., 25%+ cancellations), go to the individual clinician page to see patterns and address gaps in communication or reminders.

Outstanding Notes

Check for overdue notes. If any clinician has 5+ outstanding notes, visit their individual pages and click into the "i bubble" next to the number of outstanding notes to see the notes that are overdue. Consider sending a screenshot of overdue notes so they can get caught up quickly.

Retention Rate

Look at the percentage of clients who are staying for 8+ sessions. If retention is low, go to the individual clinician page to dig into the details and explore strategies to improve client engagement and goal-setting in early sessions.

Churn Rate

Check if clients are dropping off after 1-3 sessions. If churn is high (above 25%), investigate the individual clinician page and work with the clinician to find out if there's a referral mismatch or other issues causing clients to not stick around.

Appointment Scheduling

Click into individual clinician pages. Review upcoming bookings and the active clients count. If a clinician isn't booking future sessions or has a low number of active clients (should be roughly 1.8 to 2x their weekly session goal), discuss strategies to improve scheduling and retention.