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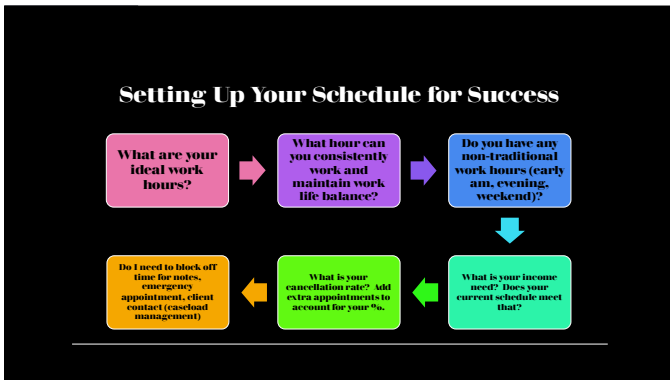
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**Look Back!**

- Look back at your last 5 months on your clinical calendar.
- What appointment times were most often empty?
- How many unfilled appointments did you average each week?
- How many ACTIVE clients do you have?
- How many ACTIVE clients do not have a next appointment scheduled?

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**Look IN!**

- Look at client retention.
- How many of your client commit to care and complete the treatment plan?
- Do you notice a trend with client dropout?
- Do you notice a strength emerging as you consider most successful clients?
- Do you need to update your bio, psychology today, specialties list?

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**Looking Out:  
Planning for  
Breaks and  
Vacations**

Do you have a vacation planned?

Do you have regularly scheduled breaks? Mental health days, doctor/dentist appointments, do you need to add those?

Do you need to make adjustments for team trainings, family events, personal events?

Review your calendar regularly and make changes as far in advance as possible.

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**GETTING FULL & STAYING FULL!**

**Caseload Management (burnout prevention)**  
Document contact and discharge noncompliant clients with a termination note and referral email.

Discuss treatment plan compliance with clients who frequently cancel and/or reschedule. Set a firm boundary.

Intakes are always ON! If you have a scheduled time in your calendar available, it needs to be scheduled to keep you on track.

Tight schedules  
DECREASE cancellations, no shows, and noncompliant clients

Ensure EVERY client schedule out their treatment plan.

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## School Based Services



### SCHEDULING

- Schedule ALL your clients out on your calendar according to their treatment plan
- You can adjust your calendar as you go. This is fall-through-the-cracks prevention.
- CONNECT with campus leaders and Build relationships (BILL 888888 for consultation, collaboration, and wrap around services)
- Know that you make a BIG difference!

### BALANCING

- Manage your caseload. Ensure you are at minimum 1/5 office based
- Summer and breaks are scheduled, you can plan
- See clients in office, via telehealth, or do telephone check ins

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## Delivering High-Quality Services

-  What specialized training do you have? Do you market your speciality?
-  Do you attend case consultation?
-  Do you attend trainings? Book studies?
-  What do you do to stay fresh and ever-learning and growing as a clinician?
-  What interests you most about clinical care?

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## LOOK AT THE DATA!



HOW MANY CLIENTS HAVE YOU BEEN ASSIGNED?



WHAT IS YOUR AVERAGE TREATMENT PLAN LENGTH?



ARE YOU USING ASSESSMENTS?



WHAT IS YOUR THERAPEUTIC ALLIANCE SCORE?



WHAT DO THE MOST COMPLAINT MOST SUCCESSFUL CLIENTS HAVE IN COMMON?

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### What is working, what is not working?

- Are you giving clients feedback on their work?
- Are goals and progress and regression a normalized part of the discussion during every treatment session?
- Do you ask clients for feedback about the direction of care and ensure you are meeting their expectations?

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### Goals

- Do client and therapist agree upon goals?
- Are goals regularly reviewed and adjusted as needed?
- Do assessments help SHOW clients their progress or regression?
- “What goal is most important to work on today?”

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### You are the “tool” of your job!

- How do you stay sharp?
- How do you stay focused?
- How do you improve function?
- How do you set goals?
- How do you stay motivated?
- How do you celebrate wins?
- How do you know you are making a difference?



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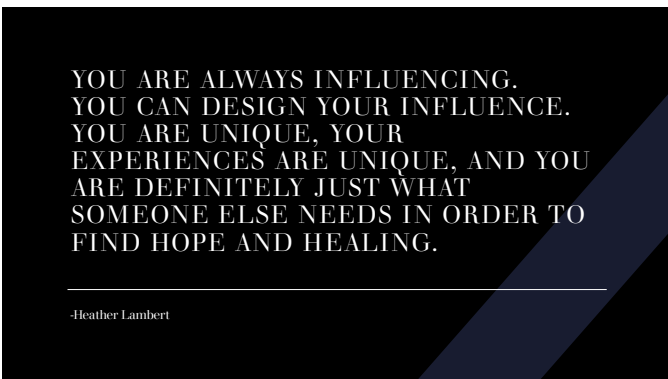
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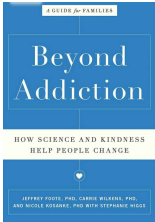
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February/March  
Thurs, Feb 2nd noon  
Wed, Feb 22nd noon  
Thurs, March 23rd noon



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