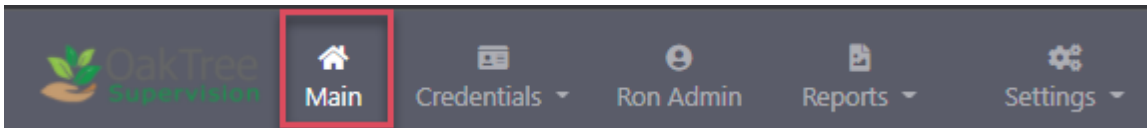


## Release Notes OakTree Software Build 1.8

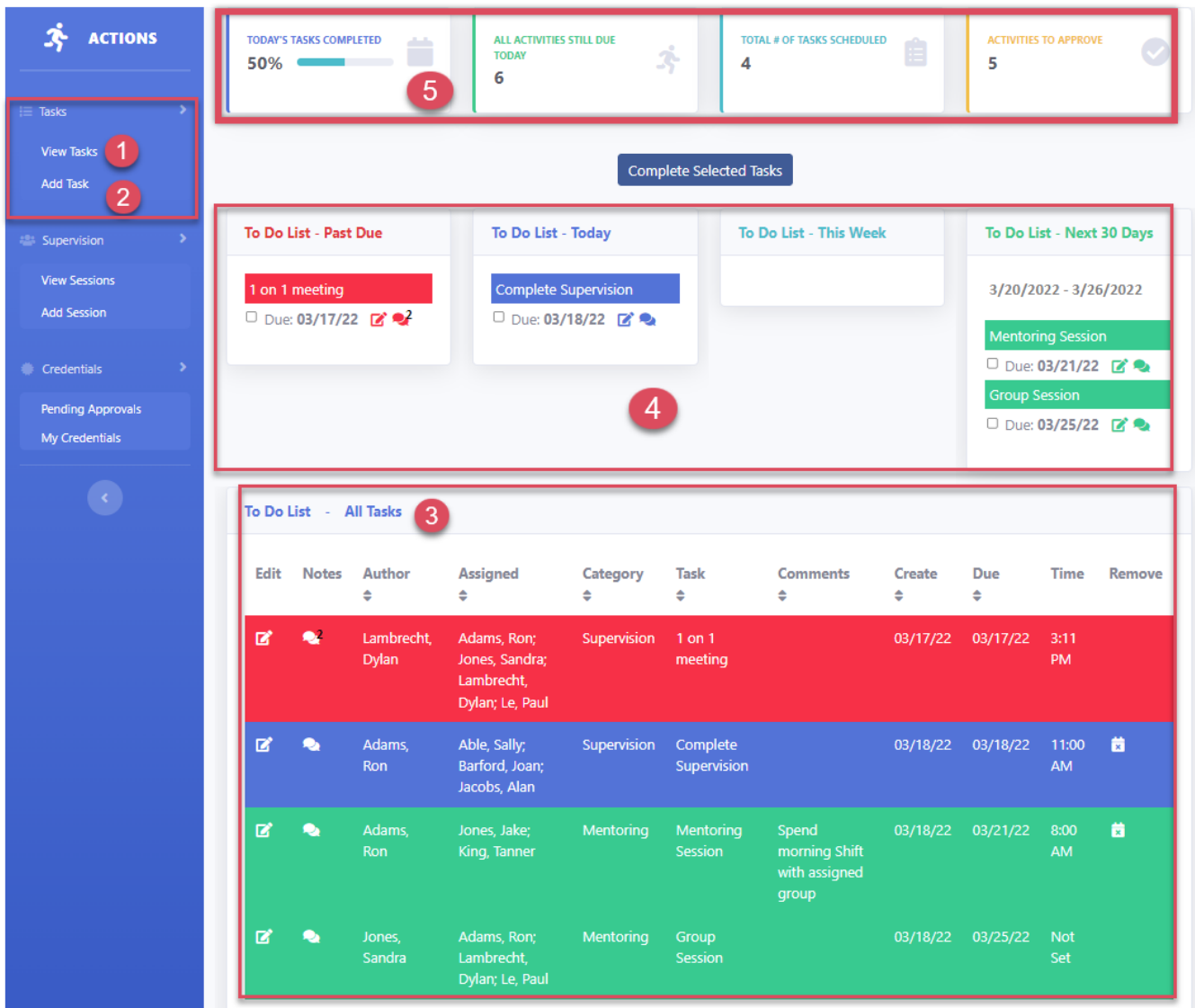
### Summary of Enhancements and Bug Fixes

#### New Enhancement found under Main Icon



#### ➤ To Do List

1. Actions module - Home view after signing in
2. Add Tasks to a To Do List (See Fig. 1)
3. List of assigned tasks of staff
4. Task sorting by Past Due, Today, This Week and next 30 Days
5. Tracking of task completion percentage



**Summary of Tasks:**

- TODAY'S TASKS COMPLETED: 50% (5 tasks)
- ALL ACTIVITIES STILL DUE TODAY: 6
- TOTAL # OF TASKS SCHEDULED: 4
- ACTIVITIES TO APPROVE: 5

**Task Categories:**

- To Do List - Past Due:** 1 on 1 meeting (Due: 03/17/22)
- To Do List - Today:** Complete Supervision (Due: 03/18/22)
- To Do List - This Week:** (Empty)
- To Do List - Next 30 Days:** 3/20/2022 - 3/26/2022
  - Mentoring Session (Due: 03/21/22)
  - Group Session (Due: 03/25/22)

**To Do List - All Tasks Table:**

Edit	Notes	Author	Assigned	Category	Task	Comments	Create	Due	Time	Remove
		Lambrecht, Dylan	Adams, Ron; Jones, Sandra; Lambrecht, Dylan; Le, Paul	Supervision	1 on 1 meeting		03/17/22	03/17/22	3:11 PM	
		Adams, Ron	Able, Sally; Barford, Joan; Jacobs, Alan	Supervision	Complete Supervision		03/18/22	03/18/22	11:00 AM	
		Adams, Ron	Jones, Jake; King, Tanner	Mentoring	Mentoring Session	Spend morning Shift with assigned group	03/18/22	03/21/22	8:00 AM	
		Jones, Sandra	Adams, Ron; Lambrecht, Dylan; Le, Paul	Mentoring	Group Session		03/18/22	03/25/22	Not Set	

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(Fig. 1)

**ACTIONS**

TODAY'S TASKS COMPLETED 50%

ALL ACTIVITIES STILL DUE TODAY 6

TOTAL # OF TASKS SCHEDULED 4

AC AP 5

Tasks

View Tasks

**Add Task**

Supervision

View Sessions

Add Session

Credentials

Pending Approvals

My Credentials

## Add Task

**Task Category \***  
Mentoring

**Task Description \***  
Mentoring Session

**Due Date \***  
03/18/2022

**Time (Optional)**  
08:00 AM

**Add or Remove Assigned Users**  
James, Derwin Assign Selected User Remove Selected User

**Assigned**  
Bosa, Joey; James, Derwin

**Additional Information**  
Start AM mentoring

\* - Required Fields

Cancel Update

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## ➤ Supervision

1. View Session - see history of supervision sessions completed (See Fig. 2)
2. Add Session Document supervision sessions (See Fig. 3)

(Fig. 2)

The screenshot displays the 'Supervision' section of a software interface. On the left is a blue sidebar with 'ACTIONS' and a list of options: 'Tasks', 'View Tasks', 'Add Task', 'Supervision', 'View Sessions' (highlighted with a red box and a red circle containing the number 1), 'Add Session' (with a red circle containing the number 2), 'Credentials', 'Pending Approvals', and 'My Credentials'. A red arrow points from the 'View Sessions' option to the 'Sessions' table. At the top of the main content area are four summary cards: 'TODAY'S TASKS COMPLETED 50%' with a progress bar, 'ALL ACTIVITIES STILL DUE TODAY 6', 'TOTAL # OF TASKS SCHEDULED 4', and 'ACTIVITIES TO APPROVE 5'. Below these is the 'Supervision' header with an 'Add Session' button (with a red circle containing the number 2). The 'Sessions' table has columns: Edit, Tasks, Author, Assigned, Category, Topic, Date, Begin, End, Duration, and Remove. The first row is highlighted in yellow and shows a session by Lambrecht, Dylan on 03/17/22. The second row shows a session by Jones, Sandra on 03/18/22.

Edit	Tasks	Author	Assigned	Category	Topic	Date	Begin	End	Duration	Remove
		Lambrecht, Dylan	Adams, Ron; Jones, Sandra; Lambrecht, Dylan; Le, Paul	Monthly Session		03/17/22	2:11 PM	1:11 PM	0.00	
		Jones, Sandra	Adams, Ron; Le, Paul	Monthly Session	Ethics	03/18/22	9:00 AM	10:00 AM	1.00	

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(Fig. 3)

**ACTIONS**

TASKS SUMMARY: TODAY'S TASKS COMPLETED 50%, ALL ACTIVITIES STILL DUE TODAY 6, TOTAL # OF TASKS SCHEDULED 4

**Add Session** 2

**Session Date \***  
03/18/2022

**Begin Time (Optional)**  
08:00 AM

**End Time (Optional)**  
11:00 AM

**Duration (Hour / Minute)**  
3

**Form \***  
Supervision 1

**Category \***  
Monthly Session

**Add or Remove Participants**  
Jacobs, Phil [Assign Selected User] [Remove Selected User]

**Participants**  
Barford, Joan; Gates, Antonio; Jacobs, Phil

**Topic**  
Client Supervision Class

**Case Review**  
Review of Cass Studies

**Discussion**  
Recommendation for improvement

**Recommendations**  
Read material assigned

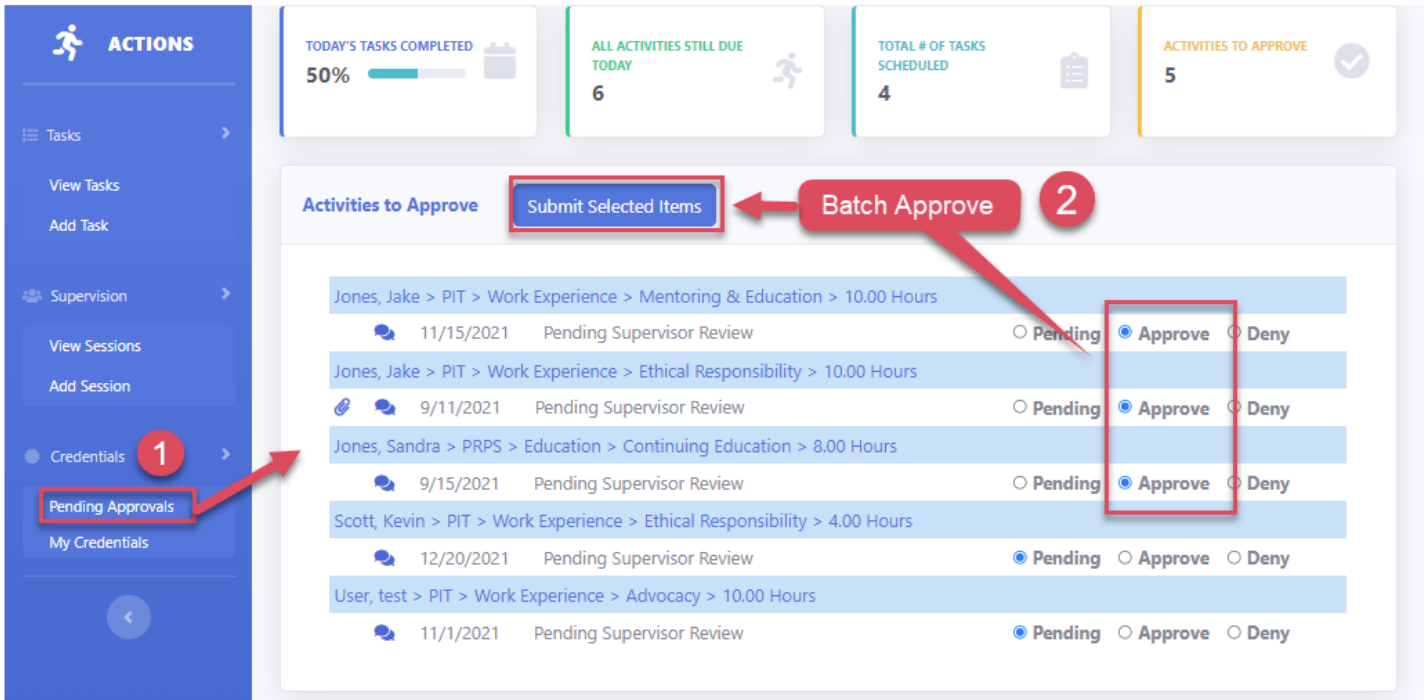
\* - Required Fields [Cancel] [Update]

# Release Notes OakTree Software Build 1.8

## ➤ Credential Hours Approval

1. Supervisors can approve hours submitted by staff for credential requirements (See Fig. 4)
2. The ability for supervisors to batch approve hours submitted by staff for credential requirements (See Fig 4)

(Fig. 4)



# Release Notes OakTree Software Build 1.8

## ➤ Demographics

1. Additional fields for providers to add their demographics
2. Export of demographics field for providers

### My Profile

**Name:** Ron Adams      **Agency:** Orion Health and Wellness Center  
**Title:** SuperAdmin      **Location:** Orion South  
**Supervisor:** N/A

- Credential License Number
- Change Password
- Demographics**

#### Demographics

**Date of Birth:** 04/05/1980      **Address:** 18037 Oak Street

**Age:** 41      **Zip Code:** 32456

**Gender:** Male      **City:** Port Saint Joe      **State:** FL

**Race:** Hispanic      **County:** Gulf

**Ethnicity:** Latino      **Phone No.:** 498-345-1212      **Type:** Cell

**Language:** Spanish      **Email:** jforst@hotmail.com

**Highest Level of Certification:** Core Peer Recovery Specialist

**Are you or have you ever been on probation?** No

**State/Counties Providing Services To:**

Florida      Gulf      Add

State	County	Remove
FL	Gulf	✗
OK	Canadian	✗

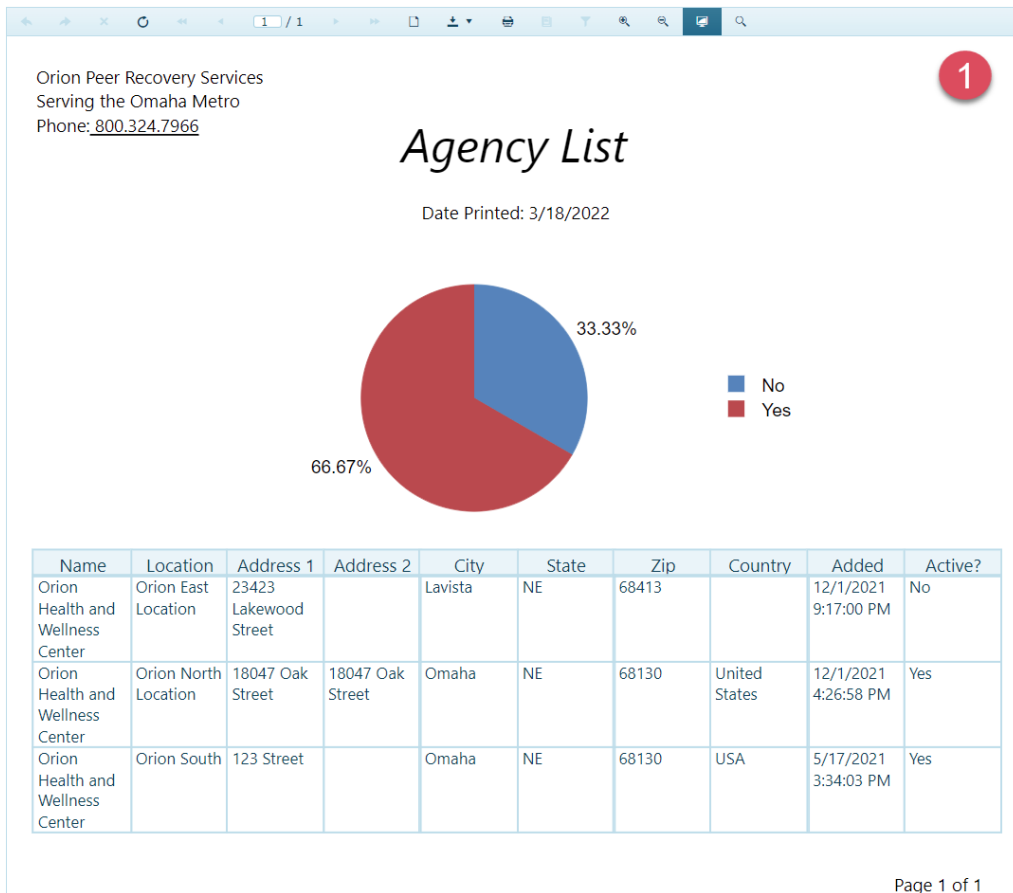
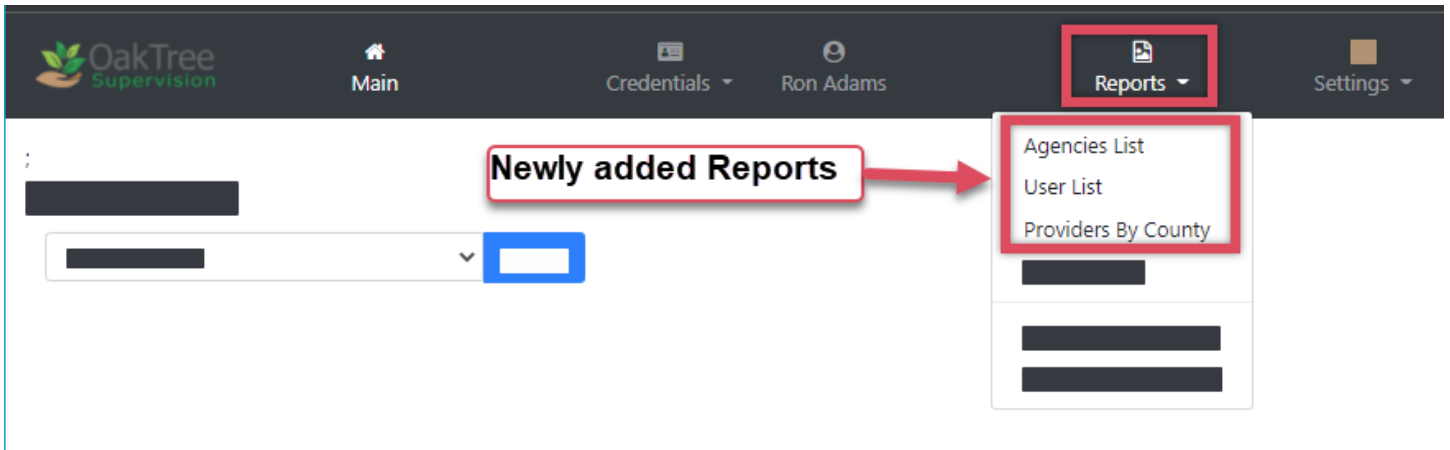
**Update All Changes**

System Information

# Release Notes OakTree Software Build 1.8

## ➤ New Reports - Added

1. Agency List – percentages of active and inactive agencies
2. User List – list of each active user assigned to this organization
3. Providers by County – list of active users who have entered their demographics in the Oaktree under this organization



# Release Notes OakTree Software Build 1.8

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Orion Peer Recovery Services  
Serving the Omaha Metro  
Phone: [800.324.7966](tel:800.324.7966)

## User List

Date Printed: 3/18/2022

First Name	Last Name	Supervisor	Assigned Credential	Create Date	User ID	Job Title	Role	Agency ID	Agency Name	Agency Location
Sally	Able	Derwin James		9/14/2021 6:59:35 PM	9	Supervisor All Records in Agency	Supervisee	TEST	Orion Health and Wellness Center	Orion South
Ron	Adams			6/30/2021 3:05:26 PM	4	SuperAdmin	Super Admin	TEST	Orion Health and Wellness Center	Orion South
Joan	Barford	Derwin James		9/17/2021 4:42:29 PM	20	Supervisee	Supervisee	TEST	Orion Health and Wellness Center	Orion South
Joey	Bosa	Derwin James		9/16/2021 8:01:52 PM	13	Peer Specialist	Supervisee	TEST	Orion Health and Wellness Center	Orion South
Kyle	Brewer			5/17/2021 3:34:04 PM	1	Peer Specialist Program Manager	Super Admin	TEST	Orion Health and Wellness Center	Orion South
Antonio	Gates	Phillip Rivers		9/16/2021 8:22:48 PM	16	Supervisee	Supervisee	TEST	Orion Health and Wellness Center	Orion South
Tom	Howard	Sally Able		9/14/2021 7:03:17 PM	10	Supervisor Supervisee Records	Supervisor Supervisee Records	TEST	Orion Health and Wellness Center	Orion South
Alan	Jacobs	Derwin James		9/17/2021 4:40:33 PM	19	Supervisee	Supervisee	TEST	Orion Health and Wellness Center	Orion South
Phil	Jacobs	Ron Adams		9/14/2021 6:46:05 PM	8	Supervisor All Records	Supervisor All Records	TEST	Orion Health and Wellness Center	Orion South
Derwin	James			8/24/2021 9:32:34 PM	5	Supervisor	Supervisor Supervisee Records	TEST	Orion Health and Wellness Center	Orion South

3

Orion Peer Recovery Services  
Serving the Omaha Metro  
Phone: [800.324.7966](tel:800.324.7966)

## Providers By County

Date Printed: 3/18/2022

County	State	First Name	Middle Name	Last Name	Job Title	City	Phone	Email	User Id	Agency Name	Agency Location
Canadian	OK	Ron		Adams	SuperAdmin	Concho	498-345-1212	jforst@hotmail.com	4	Orion Health and Wellness Center	Orion South
Clark	AR	Sandra		Jones	SuperAdmin				21	Orion Health and Wellness Center	Orion South
<b>2 Counties</b>											



## Release Notes OakTree Software Build 1.8

- Task category should now change after being updated
- The remove icon on the task grid table should now work for the author
- Demographics setup should now only be accessible to the super admin
- The date of birth field should be updated with more usable selection options
- The zip code and phone number fields have not been updated. Leaving it open for other countries, but can change if the group would rather have it updated.
- The remove function on a task should now refresh immediately after selecting.
- The author of a task should now be able to “edit task” category and “assigned to”
- The cursor should be active in most fields when entering a screen.
- Fixed modal screen interaction on Add New Task
- Editing a task should maintain any changes made by the author
- Modified the address field in demographics. Put address first followed by zip code for the user to benefit from the autofill of city and state
- Added validation when adding counties and states to the selection area more than once
- Modified UI for displaying county and state
- A user can now add a supervision session and keep track of the history of sessions
- Add a New Task – Due Date defaults to Today’s date but can be changed