

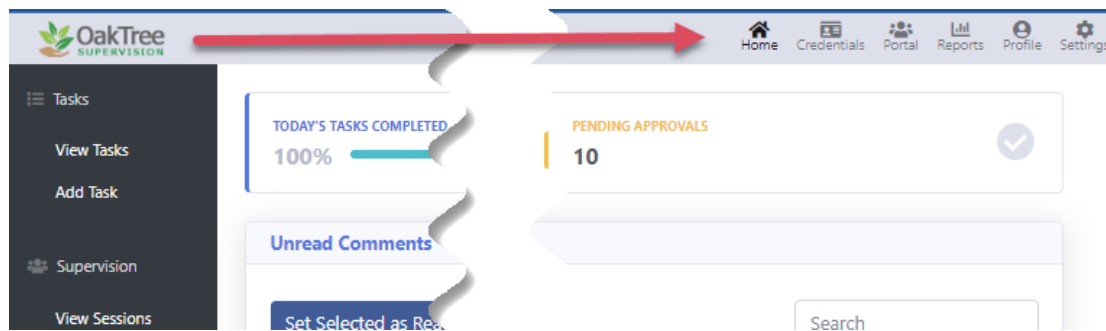
## Release Notes OakTree Supervision Software Build 2.0

### Enhancements and Bug Fixes - Summary

#### Navigation Icons have moved to the upper right corner

To improve screen layout and real estate, the top row of icons has been reduced in size and moved to the right. User login confirmation can be found by hovering over the Profile icon.

The color scheme and side navigation bar have been modified for users to easily identify functions when hovering over the selections and unnecessary icons have been removed for more efficient use of space.



#### Updated the “Home” page

Once the user logs into the system, they are taken to a “Home” page. This home page provides quick access to information and activities.

- 1) Unread Comments:** This allows users to see any unread comments they are associated with in Credentials or Tasks. Users will only be able to see comments from staff that they have access to (as a Supervisor or Super Admin)
- 2) Apply Hours:** view the dashboard. This allows the user to view a summary of their credentials and conveniently apply hours to any of the categories.
- 3) To-Do List Summary:** View all of your tasks in a summary
- 4) Mini Dash Cards:** The mini dash cards at the top of the screen are now active links that take the user to the corresponding function.

The dashboard includes a sidebar with navigation options: Tasks, Supervision, Credentials, Pending Approvals, and My Credentials. At the top, there are three summary cards: 'TODAY'S TASKS COMPLETED' (100%), 'DUE TODAY' (10), and 'UNREAD COMMENTS' (11). A 'PENDING APPROVALS' card shows 10. The 'Unread Comments' section has a 'Set Selected as Read' button (1) and a table with columns: Created, Source, Author, Note, and icons for reading and editing. The 'Apply Hours' section (2) has a table with columns: Cred, Type, Cat, and Apply. The 'To Do List' section (3) shows task counts for Today (0), Past Due (0), This Week (0), and Next 30 Days (0). Red callouts 4 point to the 'DUE TODAY' and 'UNREAD COMMENTS' cards.

## 1) Unread Comments

A new section called “Unread Comments” was added to allow users to immediately see any unread comments that they are associated to.

1. Read the note by clicking this icon
2. Edit your notes by clicking this icon
3. Check one or more boxes then click the **Set Selected as Read** button to mark and remove them from the list
4. Show 5 or more unread comments at a time
5. If there are more pages select them here

This detailed view of the 'Unread Comments' table includes the following callouts:
 

- 1: Points to the eye icon in the 'Note' column for reading.
- 2: Points to the pencil icon in the 'Note' column for editing.
- 3: Points to the checkboxes in the 'Created' column.
- 4: Points to the 'Set Selected as Read' button at the top left of the table.
- 5: Points to the pagination controls at the bottom right, which show 'Showing 1 to 5 of 12 rows' and '5 rows per page'.

## 2) Apply Hours

Users can apply hours to their credentials from the home page, making it easier to access your credential types and categories.

1. Click the hourglass icon to apply your hours
2. Show 5 or more unread comments at a time
3. If there are more pages select them here

Cred	Type	Cat	Apply
CorePIT	Education	AR Core Training	⌚
CorePIT	Education	Continuing Education	⌚
CorePIT	Peer Supervision	Advocacy/Ethical Responsibility /Mentoring	⌚
CorePIT	Peer Supervision	Assigned Peer Supervisor	⌚
CorePIT	Work Experience	Advocacy	⌚

Showing 1 to 5 of 7 rows 5 rows per page

Search

1 2 >

## 3) To-Do List

Users can access their To-Do list and mark them as complete. This provides users a quick way to view all of the tasks associated to them.

1. Click the pencil/paper icon to edit or assign users to your task
2. Click the message icon to send a message to other users
3. The task description is shown here
4. Check the box then click the **Complete Selected Tasks** button to mark and remove them from the list

Complete Selected Tasks

Today (1) ✓

Conduct a Supervision Session Due: 01/26/23

Past Due (1) >

This Week (0) >

Next 30 Days (1) >

#### 4) Mini Dashboard Cards

Now, not only can users see the information displayed on the mini dashboard cards, but each card is an active link. Users can click on the card and it will take them to the appropriate function.

1. Percentage of tasks completed today
2. Number of tasks due today, past due, and pending approvals
3. Number of unread comments
4. Number of pending approvals



### Attaching multiple documents to their transcript records.

Previously, users could only add one supporting document/attachment when applying for hours. Now when the user uploads a document, they can upload multiple documents.

#### Manage Attachments ✕

APR, Advocacy, Education ✕

Activity Date(s): 01/12/2023 to 01/12/2023 Hours: 4

Description:

Add Document(s):

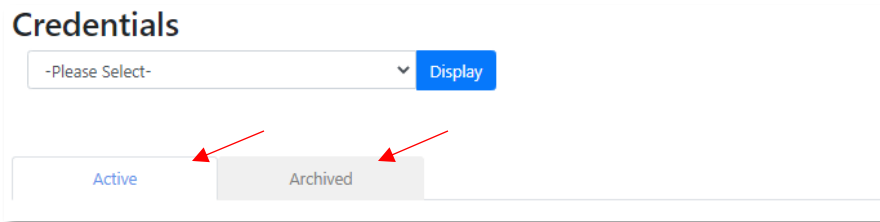
No file chosen

<input type="checkbox"/>	File Name
<input type="checkbox"/>	Paul_Ethics Training Hours_Jan23.pdf
<input type="checkbox"/>	Paul_EthicsTraining_Certificate_Jan23.pdf

Showing 1 to 2 of 2 rows

## Renewing a User's Credentials

The Renew Credentialing feature provides the OakTree Super Admin the option to renew a user's credentials. In the "Active" tab, you will see any current and/or open credentials. Completed credentials can be renewed, which will move them to an "Archived" tab along with any corresponding transcripts. Then a "renewed" credential is assigned in the Active tab, with zero (0) Hours Completed and a new Start Date and Expire Date.



Hours Completed	Total Hours Remaining	Renew
146	0	
46 ✓	0 ✓	

Start Date	Expire Date	Credential Type	Hour Type	Category	Hours Completed	Total Hours Remaining	
11/4/2021	5/4/2023	Advanced Peer Recovery Specialist			39 ✓	0 ✓	
			Advocacy		8 ✓	0 ✓	
				Education	8 ✓	0 ✓	
			Education		26 ✓	0 ✓	
				Ethics	26 ✓	0 ✓	
			Peer Supervision		5 ✓	0 ✓	
				Education	5 ✓	0 ✓	