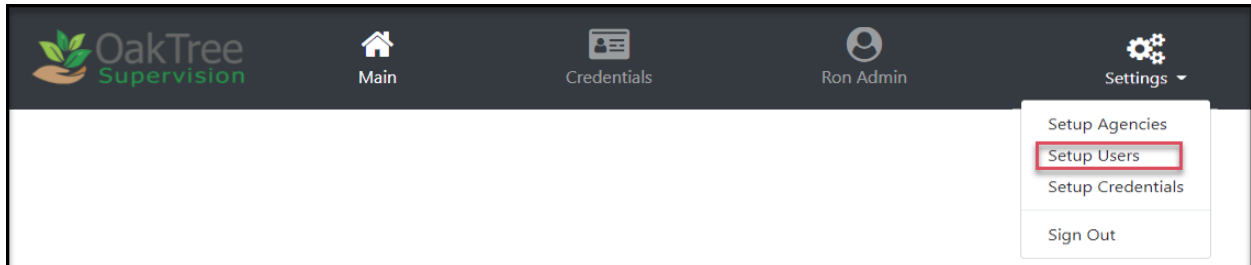


OakTree Supervision Settings - Setup Users

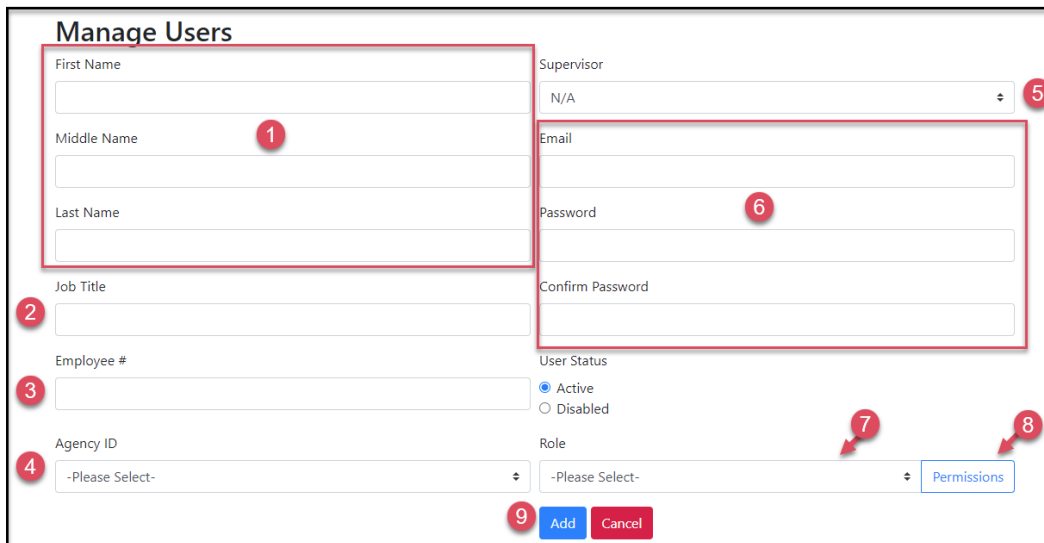
OakTree Supervision provides a means to track and record your supervisee's credentialing progress. The second step is to add users to the database.

Step #1 – To start go to Settings → Setup Users



Step #2 - Click  button

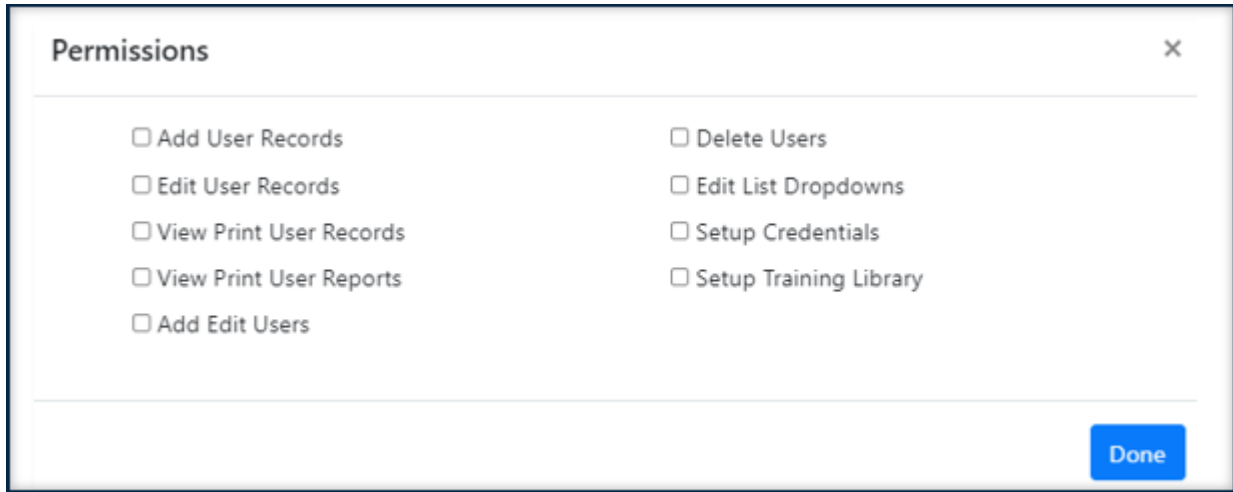
Step #3 – Create your users

A screenshot of the 'Manage Users' form. The form is divided into two columns. The left column contains fields for 'First Name', 'Middle Name', 'Last Name', 'Job Title', 'Employee #', and 'Agency ID'. The right column contains fields for 'Supervisor', 'Email', 'Password', 'Confirm Password', 'User Status' (with radio buttons for 'Active' and 'Disabled'), and 'Role'. At the bottom right, there is a 'Permissions' button. At the bottom center, there are 'Add' and 'Cancel' buttons. Red numbered callouts (1-9) point to various fields: 1 points to the name fields, 2 to Job Title, 3 to Employee #, 4 to Agency ID, 5 to Supervisor, 6 to the password fields, 7 to Role, 8 to Permissions, and 9 to the Add button.

1. **Name of User** – Enter in First, Middle, and Last Name (if no middle name leave blank)
2. **Job Title** – Enter the job title of the user
3. **Employee #** – Enter the user's employee number
4. **Agency ID** – Select the Agency ID from the list (**if you cannot find the Agency ID refer to guide Setup OakTree Agencies**)
5. **Supervisor** – (Select a supervisor from the list **if applicable**)
6. **Login information** – Enter the user's email address, create a password and confirm the password (**see Fig.1 below for password rules**)
7. **Role** – Select Role for this user (**see fig. 2 for role descriptions**)
8. **Permissions** – Click the button to see or modify the permissions of the user

OakTree Supervision Settings - Setup Users

Screenshot of Permissions dialog box when opened.



The following are the **DEFAULT PERMISSIONS** for each “Role”:

(Any user can be modified to have any permission)

	Add User Records	Edit User Records	View/Print User Records	View/Print User Reports	Add/Edit Users	Delete Users	Edit List Mngrs	Setup Creds	Setup Train Library
Super Admin	X	X	X	X	X	X	X	X	X
Supervisor All Records	X	X	X	X	X	X	X	X	X
Supervisor All Records own agency	X	X	X	X					
Supervisor Supervisee Records	X	X	X	X					
Supervisee (own records only)	X	X	X	X					

OakTree Supervision Settings - Setup Users

Password Creation Rules

Supervisor: N/A

Email: testuser@hotmail.com

Password:

Confirm Password:

Passowords must be at least eight characters long and must meet at least three of the following four criteria

- At least one uppercase letter
- At least one lowercase letter
- At least one number
- At least one special character

Fig.1

Click the password field to see the password rules

List of Access Level with an explanation of each

Role

-Please Select-

Super Admin

Supervisor All Records

Supervisor All Records In Agency

Supervisor Supervisee Records

Supervisee

Fig. 2

Super Admin –

Supervisor All Records –

Supervisor All Records –

Supervisor All Record in Agency –

Supervisor Supervisee Records –

Supervisee –

Step 4 – If you find that you need to modify a user’s information look for the pencil under the Edit column

First Name	Last Name	Job Title	Agency ID	Agency Location	Supervisor	Status	Edit
Ron	Admin	SuperAdmin	OBHS	West Omaha	N/A	Active	
Sam	Howard	OHBS Supervisor	OBHS	West Omaha	Admin, Ron	Active	
Maryann	Vissee	OHBS Peer Specialist	OBHS	West Omaha	Admin, Ron	Active	

For additional questions, contact AccuCare Support at 800-324-7966 or email support@orionhealthcare.com and we will be happy to assist you!