

OakTree

Settings - Setup Credentials

OakTree provides a means to track and record your supervisee’s credentialing progress. The third step is to set up credentials for the database.

Step #1 – To start go to Settings → Professional - Credentials

The screenshot shows the OakTree Practice Management interface. At the top, there is a navigation bar with icons for Home, Credentials, Clinical, Appointments, Calendar, Reports, Profile, and Settings. The 'Settings' icon is highlighted with a red box. Below the navigation bar, the page title is 'Manage Credentials' with a '+ Add' button. A table lists existing credentials:

Created	Credentialing Body	Credential Acronym	Credential Type	Hour Type	Category	Minimum Direct Hours
8/27/2021	NAADAC	APR	Advanced Peer Recovery Specialist			38
				Advocacy		8
					Education	8
				Education		25
					Ethics	25
				Peer Supervision		5

On the right side, there is a sidebar menu with sections: Admin (Agency, Users, Notifications, System), Clinical (Demographics, Chart Workflow), and Professional (Credentials, Skills Assessment, Libraries). The 'Professional' section is highlighted with a red box, and an arrow points from the 'Settings' menu item to the 'Credentials' option.

Step #2 - Click  button

Step #3 – Using the use case scenario follow the proceeding steps

*******Example Use Case Scenario *******

Governing Body: NAADAC

Credential Type: Nicotine Dependence Specialist (NDS)

A voluntary national credential that provides foundational knowledge of nicotine addiction, develops skills and strategies for nicotine addiction counseling, and examines related recovery and wellness issues.

- 800 direct hours of “employment” in “health care services”
- 218 direct hours of “education” in “healing art”
- 52 direct hours of training comprised of:
 - 40 hours of Nicotine-specific education.
 - 6 hours of ethics training

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Here is a view of what you will see upon opening credentials when you first open it.

Manage Credentials

Credentialing Body:

Credentialing Type:

Credential Acronym:

Credential Description:

Renewal Timeframe:

Category List

Hour Type	Category	Minimum Direct Hours	Indirect Hours	Total Hours Needed

Example of Side  – Refer to the example case scenario to fill out 1 through 6

1. **Credential Body** – Click the [Add] button to add or select NAADAC
2. **Credential Type** – Click the [Add] button to add or select Nicotine Dependence Specialist
3. **Credential Acronym** – Type in NDS
4. **Credential Description** – Type in a description explaining the credentialing type
5. **Renewal Time frame** – select the reoccurrence of time the credentialing is expected to cover
6. **Select either Year or Month** to complete the side 

Manage Credentials

1 Credentialing Body:

2 Credentialing Type:

3 Credential Acronym:

4 Credential Description:

5 Renewal Timeframe:

6

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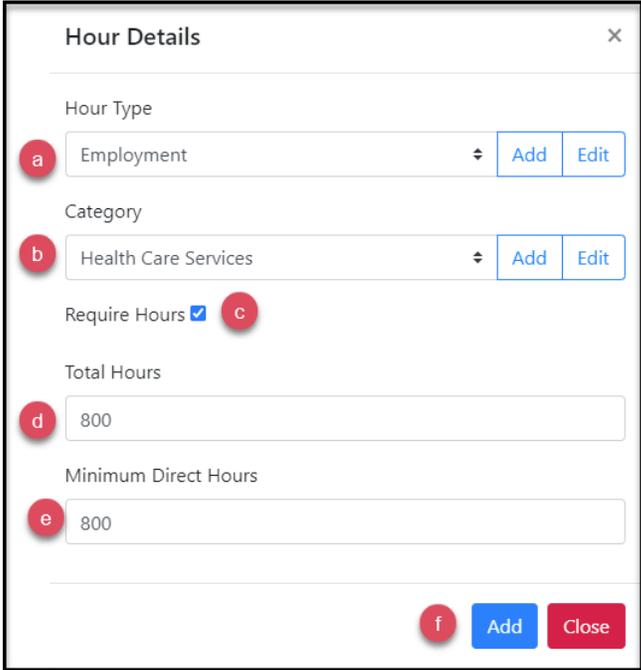
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Example of Side  - Using the case scenario add hour details for a direct set of hours

1. To start click the  button to add the first set of hours

Here is the first entry = 800 direct hours of “employment” in “Health Care Services”

2. Fill out Hour Details
 - a. Hour Type – Add or select Employment
 - b. Category – Add or select Health Care Services
 - c. Check {Require Hours} box
 - d. Total Hours – type in 800
 - e. Minimum Direct Hours – type is 800
 - f. Click the [Add] button to continue



Hour Details

Hour Type
a Employment Add Edit

Category
b Health Care Services Add Edit

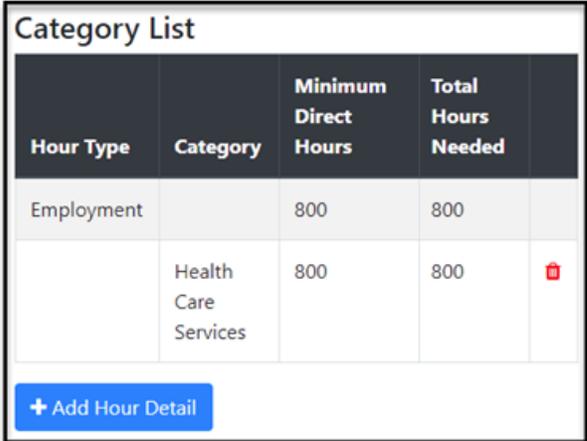
Require Hours c

Total Hours
d 800

Minimum Direct Hours
e 800

f Add Close

Your first entry will look similar to this screen shot



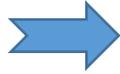
Hour Type	Category	Minimum Direct Hours	Total Hours Needed	
Employment		800	800	
	Health Care Services	800	800	

+ Add Hour Detail

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- Continuing to the next hourly details using the steps above and this second entry = 218 direct hours of “education” in “healing art”

Your first and second entry should similar to this screen shot



Hour Type	Category	Minimum Direct Hours	Total Hours Needed	
Education		218	218	
	Healing Art	218	218	
Employment		800	800	
	Health Care Services	800	800	

[+ Add Hour Detail](#)

- The last set of hourly details shows a total of 52 hours under Training broken down into three categories =
 - 52 direct hours of training comprised of:
 - o 40 hours of Nicotine-specific education
 - o 6 hours of ethics training
 - o 6 hours of HIV/other pathogens.

Hour Details ×

Hour Type: Training Add Edit

Category: Nicotine-specific Add Edit

Require Hours

Total Hours: 40

Minimum Direct Hours: 40

[Add](#) [Close](#)

Hour Details ×

Hour Type: Training Add Edit

Category: Ethics Add Edit

Require Hours

Total Hours: 6

Minimum Direct Hours: 6

[Add](#) [Close](#)

Hour Details ×

Hour Type: Training Add Edit

Category: HIV/Other Pathogens Add Edit

Require Hours

Total Hours: 6

Minimum Direct Hours: 6

[Add](#) [Close](#)

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The last step – click the [Save] button to add to Manage Credentials

****Important Reminder****

Plan you Category List creation carefully.

The category list will display on screen in the order it was added. For example (viewing the screenshot below) if you were to add another Category to heading Hour Type of Education it would show below the heading of Hour Type Training.

Manage Credentials

Credentialing Body
NAADAC Add Edit

Credentialing Type
Nicotine Dependence Specialist Add Edit

Credential Acronym
NDS

Credential Description
A voluntary national credential that provides foundational knowledge of nicotine addiction, develops skills and strategies for nicotine addiction

Renewal Timeframe
2 Year

Category List

Hour Type	Category	Minimum Direct Hours	Total Hours Needed	
Education		218	218	
	Healing Art	218	218	✖
Employment		800	800	
	Health Care Services	800	800	✖
Training		52	52	
	Ethics	6	6	✖
	HIV/Other Pathogens	6	6	✖
	Nicotine-specific	40	40	✖

Save to credentials list
+ Add Hour Detail
Save Cancel

Screenshot of Credential for Nicotine Dependence Specialist as shown on screen

5/5/2021	NAADAC	NDS	Nicotine Dependence Specialist		1070	0	1070		
				Education	218	0	218		
				Healing Art	218	0	218		
				Employment	800	0	800		
				Health Care Services	800	0	800		
				Training	52	0	52		
				Ethics	6	0	6		
				HIV/Other Pathogens	6	0	6		
				Nicotine-specific	40	0	40		

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Screenshot example of multiple credentials added to OakTree Supervision

Manage Credentials							
+ Add							
Created	Credentialing Body	Credential Acronym	Credential Type	Hour Type	Category	Minimum Direct Hours	Total Hours Needed
5/3/2021	NAADAC	PR	Arkansas Peer Recovery Specialist			571	571
				Education		46	46
					Core Training	30	30
					Post-Core Training	16	16
				Experience		500	500
					Advocacy	25	25
					Ethical Responsibility	25	25
					General	400	400
					Mentoring/Education	25	25
					Recovery/Wellness	25	25
				Peer in Training-PIT		N/A	N/A
					Completed	N/A	N/A
				Peer Supervision		25	25
					Advocacy/Ethics/Mentoring/Recovery	25	25
5/3/2021	NAADAC	APR	Arkansas Advanced Peer Recovery Specialist			559	559
				Application		N/A	N/A
					Advanced Peer Application	N/A	N/A
					Application Reviewed (NAADAC/APAC)	N/A	N/A
					Scheduled Advanced Training (UALR Mid-South)	N/A	N/A
					Submit Letter of Recommendation (PRFS)	N/A	N/A
				Education		34	34
					Advanced Training	18	18
					Peer Ethics	1.5	1.5
					Post-Advanced Training (Recovery to Practice)	14.5	14.5
				Experience		500	500
					Advocacy/Ethics/Mentoring/Recovery	100	100
					General	400	400
				Peer Supervision		25	25
					Advocacy/Ethics/Mentoring/Recovery	25	25
5/5/2021	NAADAC	NDS	Nicotine Dependence Specialist			1070	1070
				Education		218	218
					Healing Art	218	218
				Employment		800	800
					Health Care Services	800	800
				Training		52	52
					Ethics	6	6
					HIV/Other Pathogens	6	6
					Nicotine-specific	40	40

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