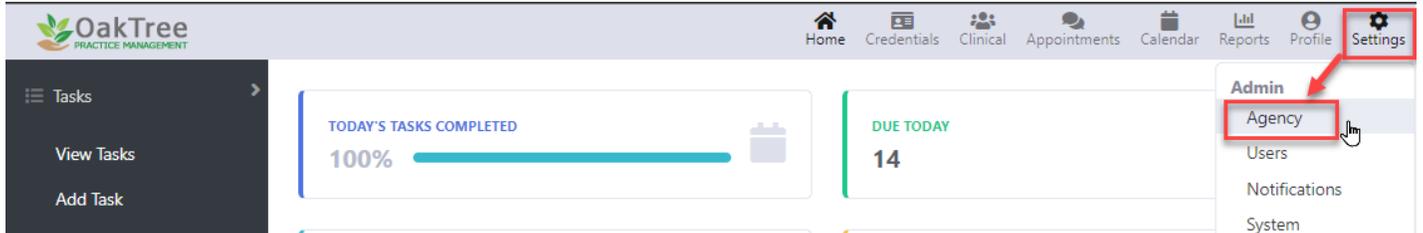


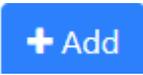
OakTree

Settings - Setup Agencies

OakTree provides a means to track and record your supervisee's credentialing progress. The first step is to add an agency or many agencies to the database.

Step #1 – To start go to Settings → Admin - Agency



Step #2 - Click  button

Step #3 – Create your agencies

A screenshot of the 'Manage Agencies' form. The form is titled 'Manage Agencies' and contains several input fields and buttons. The fields are: Agency Name (with an 'Add' button), Location (with an 'Add' button), Agency ID, Agency Status (with radio buttons for Active and Disabled), Address 1, Address 2, City, State, ZIP, Country, and Phone. There are 'Add' and 'Cancel' buttons at the bottom. Red circles with numbers 1 through 7 are placed over the 'Add' buttons for Agency Name, Location, and the main 'Add' button, and over the Address 2, City, and Country fields.

1. **Agency Name** – Click the [Add] button to create a new Agency Name
2. **Location** – Click the [Add] button to create a new Location
3. **Agency ID** – If you have an Agency ID enter it here
4. **Address** – Enter Address, City, State, and Zip
5. **County** – Enter your Country
6. **Phone** – Enter in Agencies main contact number
7. **Add** – Save your Entries to the database

OakTree

Settings - Setup Agencies

Step 4 – If you find that you need to modify an agency look for the pencil under the Edit column

Manage Agencies

[+ Add](#)

Agency Name	Agency Location	Agency ID	Status	Edit
ABC Peer Specialists	ABC Peer South Location	ABCSOUTH	Active	
Orion Behavioral Health Services	West Omaha	OBHS	Active	
Orion TX Agency	Orion North	TEST	Active	

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