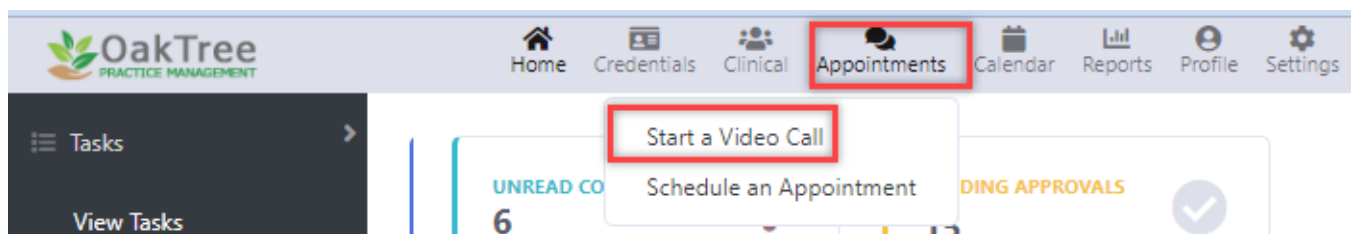


## OakTree Practice Management: Video Calling and Scheduling Appointments

OakTree provides two options under appointments. One is to start a video call directly as an impromptu meeting and the other is used to schedule an appointment for future meetings.

### How to Start a Video Call

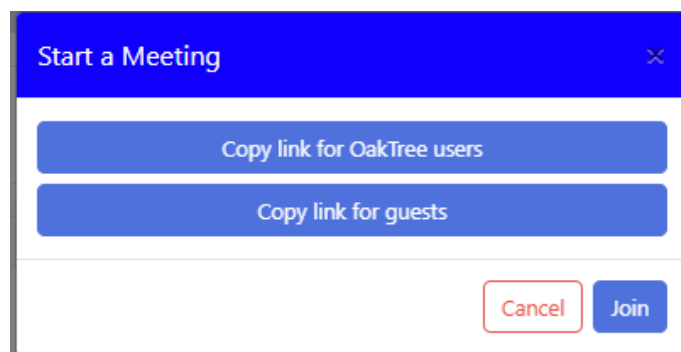
Under Appointments select the **{Start a Video Call}** link if you want to create an immediate invite to OakTree users and/or guests.



### Starting a New Meeting - Inviting Attendees

The first time you start an impromptu video call, you will have 2 options to copy the invite link before joining the video meeting. The [Copy link for Oaktree users] button will copy the invite link which will require the recipient to log into OakTree to join the meeting. The [Copy link for guests] button will copy an invite link that does not require an OakTree login. This can be sent to clients, parents, or other non-OakTree users.

Once you have copied and sent the invites, you can join the video session. NOTE: You can also copy the invite links while you are in the video meeting.



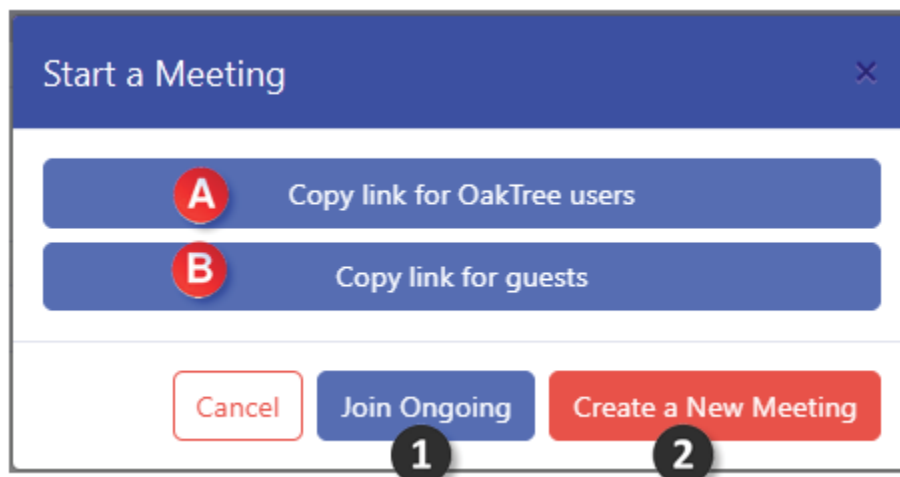
## Join an Ongoing Video Call (Host)

If the user has a prior video call, and selects the {Start a Meeting} link from the Appointment icon in the top ribbon, they will have the option to:

- 1) Join the previous meeting that you created. Selecting the [Join Ongoing] button will re-open the last meeting you created. The (A) Copy link for OakTree users and (B) Copy link for guests buttons allow you to copy the invite link for that last meeting. The [Join Ongoing] feature can be beneficial when a connection is lost during the meeting and a user or guest can re-join using the same button and/or invite link.

**IMPORTANT NOTE:** Once a meeting ends, that meeting ID is valid for 3 hours. Therefore, the host can use the [Join Ongoing] and users and guests can join (as long as the host is logged into the meeting) during this time. Each time the meeting is ended, the 3-hour time limit begins. After this period has passed and the session has not re-started, that meeting ID is no longer valid, and a new meeting must be created.

- 2) Start a brand-new video session with a new meeting ID by selecting the [Create a New Meeting] button. After selecting this button, a new video session (with a new meeting ID) will be created, and the user will have new links to copy and send to OakTree users or other guests.

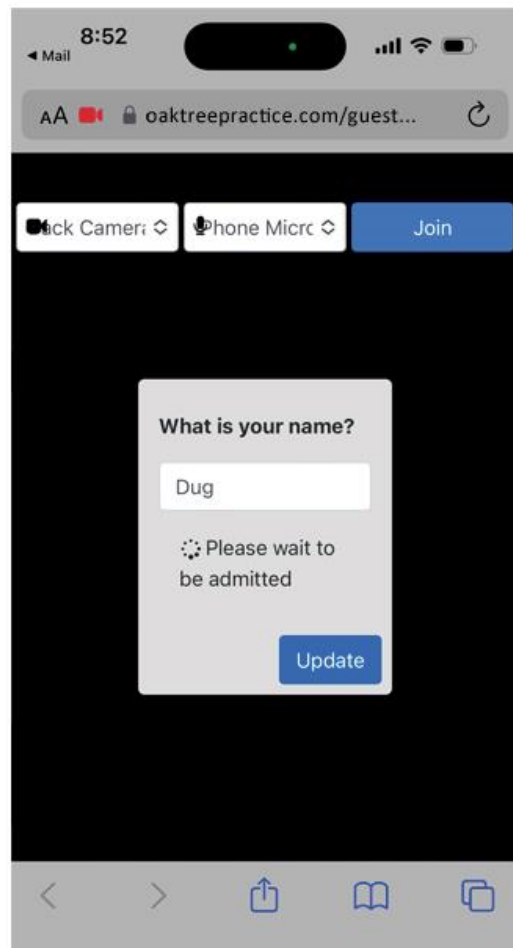


## Joining a Video Call (OakTree Users and Guests)

When an **OakTree user** receives the copied invite (i.e., via email or inner office messaging), they can click on the meeting link to join. When they select the link, they will be asked to log into OakTree before joining the meeting.

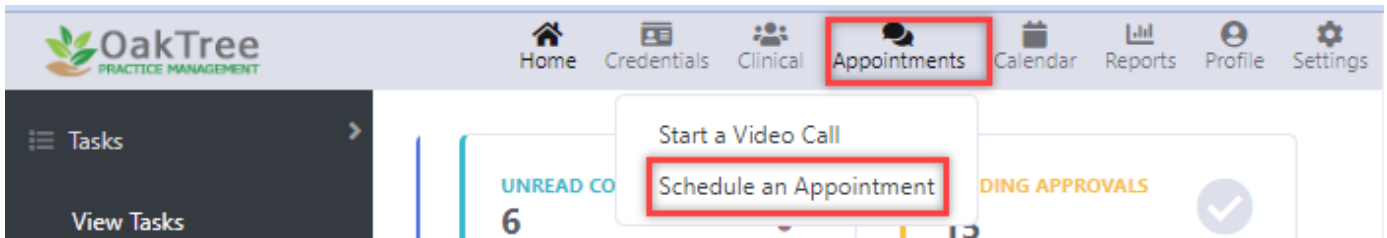
When a Guest receives the link (i.e., via email, text, or other digital messaging) they can also select the invite link. After selecting the link, the guest will be asked for their name, which will be submitted to the host of the meeting. While the host is in the meeting, they will receive a notice/alert, that a guest is trying to join. If the host authorizes the guest, the guest will then be admitted into the video call.

*Selecting the invite link as a guest on a cell phone.*



# How to Schedule an Appointment

**Step 1** – Under Appointments in the top ribbon menu select the {Schedule an Appointment} link to create and add a scheduled appointment to your Oaktree calendar and in the OakTree calendars of those staff you invite.



**Step 2** – Fill out each section as appropriate.

**NOTE:** If selecting “Video Conference” for the Setting, the invite email(s) will provide a direct link to join the meeting.

**2. Chose either In-person or Video Conference**

**3. Chose date of appointment**

**4. Enter the time of the appointment**

**6. Set up a recurrence if the your plan to have more that one appointment if applicable)**

**8. Select one or more staff for the appointment (If applicable)**

**1. Select a Service Type from the provided list**

**5. Change the Duration or use the default is 60 minutes**

**7. Type in a location for the In-Person appointments**

**9. Select one or more clients for the appointment (if applicable)**

## Scheduling Appointments Select Staff

Here is an example of how to invite OakTree staff for a Video Conference using the Schedule an Appointment option in Oaktree.

**Add/Edit Appointment**

Service Type  
Staff Meeting

Setting  
Video Conference

Date  
10/30/2023

Time  
02:00 PM

Duration (Minutes)  
45 15m 30m 45m 60m 75m 90m

Recurrence  
No Recurrence

Select Staff  
X Alai, Ron X Le, Paul X Vissee, MaryAnn

Select a Host  
Alai, Ron

Select Client(s)  
Choose Client(s)

Close Save and Close

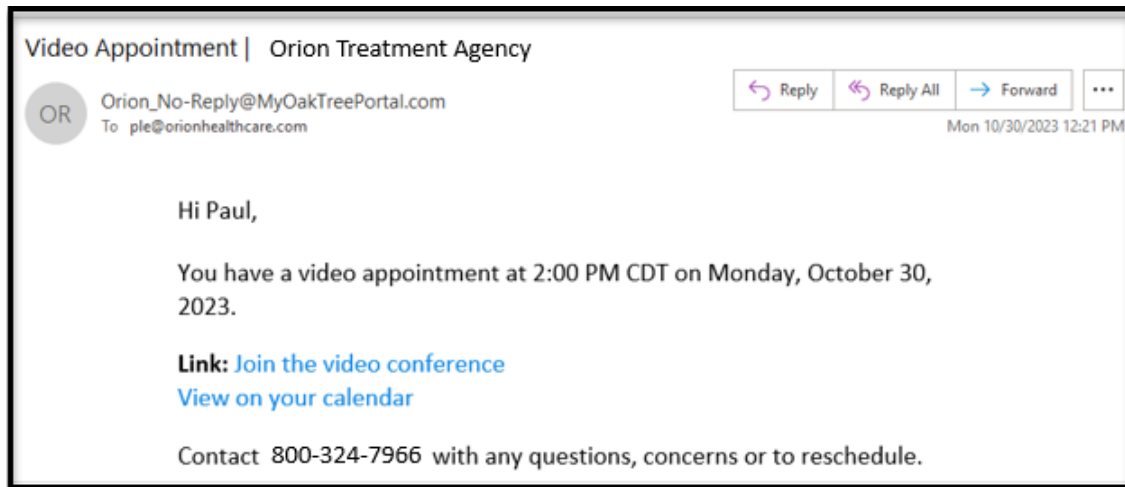
I have added my self and two others for this staff meeting

Since I added myself to staff list I am able to also make make self the host

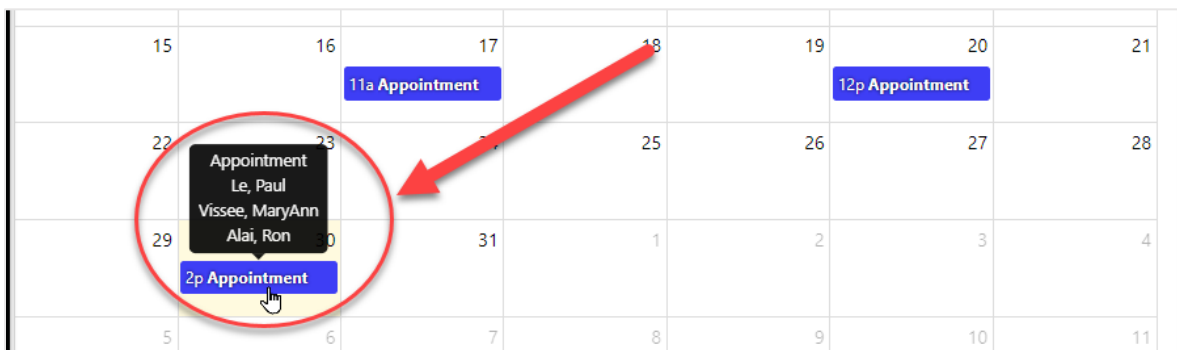
### ***Important notes to consider when using the Schedule an Appointment dialog box.***

- If you {Schedule an Appointment} with a video call, you must use the link in the calendar for that appointment, to join the video call. Joining a call using the {Start a Meeting} link will open a different session from the scheduled one.
- After scheduling an appointment, an email notice is automatically sent to the Host, selected staff, and/or select clients.
- Users and Guests can select the link in the email notice to **join the video conference**. Users can view their appointment list in Calendar, they can select the Join Meeting button (not the Start a Meeting link)
- The link will not be activated until the set day and **1 hour before** the time of the appointment

Here is an example of an email your invitees will receive. They will be able to use the links to join the video conference and add the appointment to their external calendar like Outlook.



This example screenshot shows what your OakTree Invitee will see when hovering over their calendars.



This example screenshot shows the OakTree user's "List" view, where they can select the appropriate "Join Now" link to enter the meeting



## Scheduling appointments for Selected Clients

Here is an example of how to invite clients for a Video Conference using the Schedule an Appointment option in Oaktree. Remember you will only see a list of those clients who are part of your caseload or are authorized to view.

**Add/Edit Appointment**

**Service Type**  
Group Session

**Setting**  
Video Conference

**Date**  
11/06/2023

**Time**  
09:00 AM

**Duration (Minutes)**  
60 15m 30m 45m 60m 75m 90m

**Recurrence**  
No Recurrence

**Select Staff**  
Choose User(s)

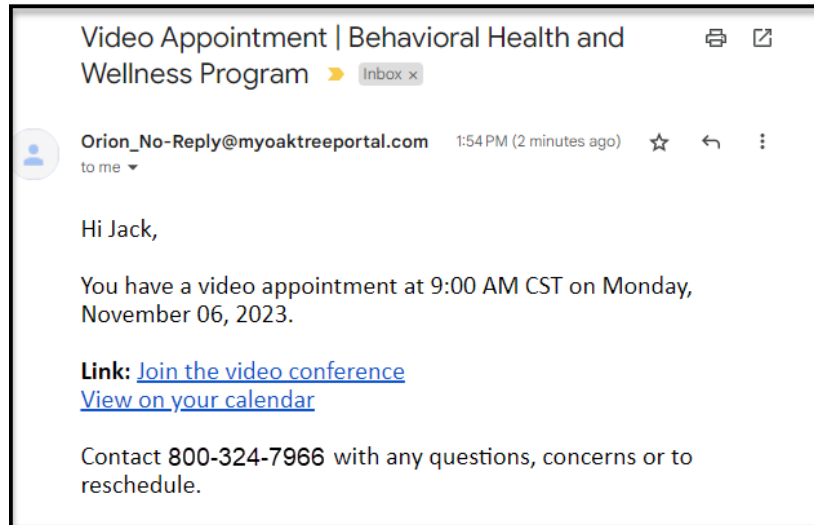
**Select Client(s)**

- × Able, Janet (DOB: 2015-10-21)
- × Albert, Jack (DOB: 2013-02-12)

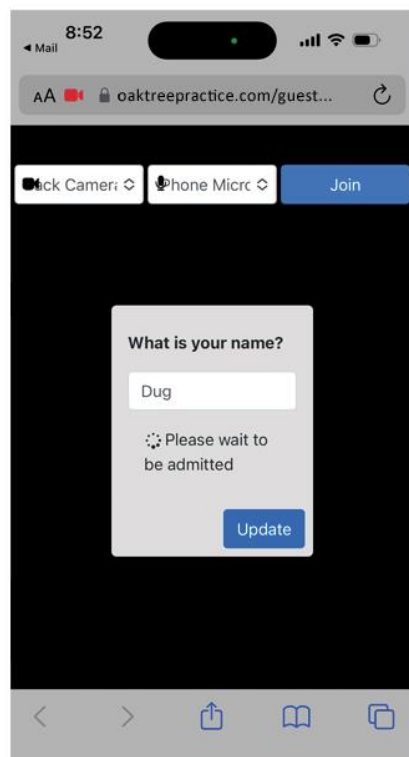
Close Save and Close

Here I have added my clients for a Group Session

Here is an example of an email your clients will receive. They will be able to use the links in the email to join the video conference and add the appointment to their external calendar like Outlook.



Selecting the link (from a phone for example) will allow the guest to enter their name, preview their camera views, then join (after the host authorizes) the video meeting.



For more questions, user guides, and tutorials on OakTree, visit our 24-hour online [Help Center](#), call us at 800-324-7966, or email [support@orionhealthcare.com](mailto:support@orionhealthcare.com)