



Release Notes OakTree Supervision Software Build 2.2

Enhancements and Bug Fixes - Summary

In this recent update, there were numerous maintenance and bug fixes, as well as an upgrade to the OakTree host server for increased security and improved internal protocols. In addition, the following features were added:

- New upload document feature in OakTree and the OakTree Client Portal
- Beta version of "AI" Reporting
- Custom forms in Professional Development
- Addition of Attributes in Client Demographics
- New text editor in clinical tools/forms
- Automatically generate ASI narrative report
- Super Admin management of User Profiles
- Numerous maintenance and bug fixes

Upload Documents in OakTree and the OakTree Client Portal

Users can upload external files to the client's chart by going to the Client Summary. You will see an Upload File button, where you can select the file and have it saved into the clients chart.

Client Summary

Select Different Client AI Tools

Selected Client: Applesauce, Paula

DOB: 05/05/2000 **Age:** 23

Email: paulaapplesauce423@hotmail.com **Phone:** 4026548985

Upload File

Search

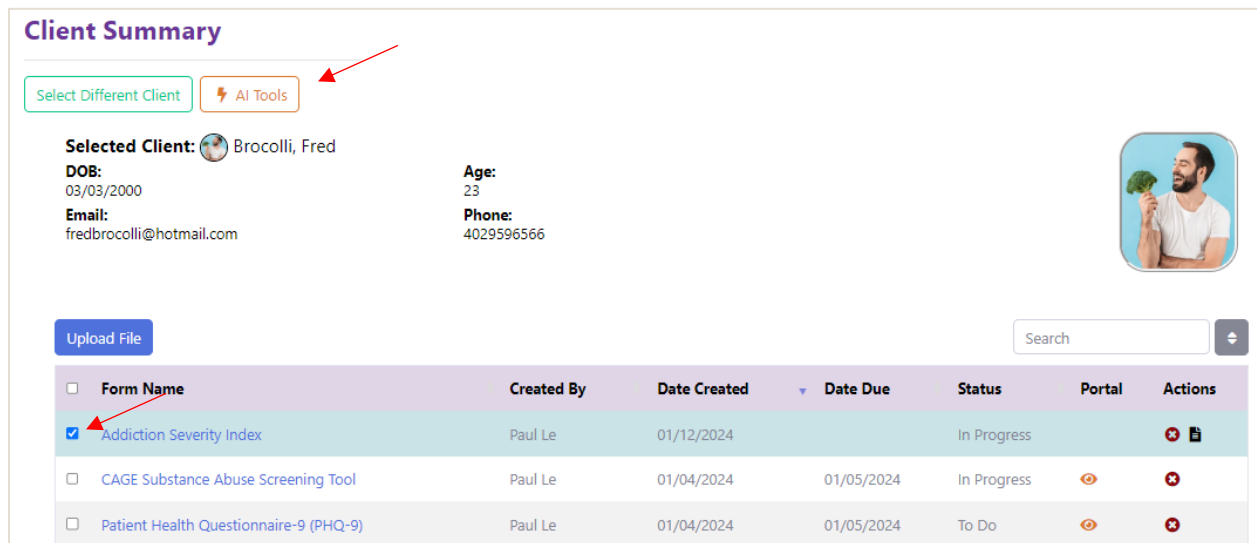
| <input type="checkbox"/> | Form Name | Created By | Date Created | Date Due | Status | Portal | Actions |
|--------------------------|--------------------------|------------|--------------|----------|-------------|--------|---------|
| <input type="checkbox"/> | Addiction Severity Index | Paul Le | 12/20/2023 | | In Progress | | |

A similar button is available for clients when they are logged into their portal. When a client uploads a file from their portal, it will automatically upload into their chart, in the Client Summary.

Generative AI Tools for Reporting, Analysis and More: Beta Version

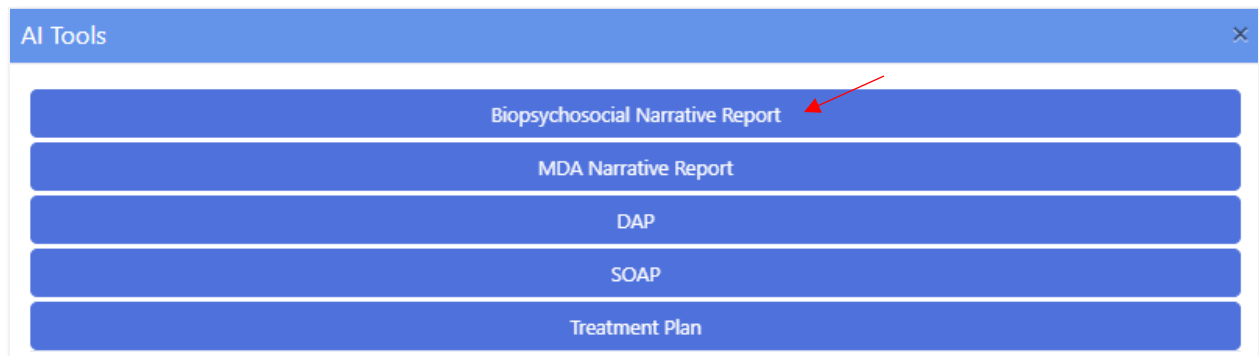
Orion has launched its beta version of an Artificial Intelligence (AI) Tool to assist the user with reporting and other analytics. Currently, from the Client Summary, users can select a form, then select the AI Tools button, to see pre-defined reports or forms that will automatically be generated by the AI engine. This includes narrative reports, DAP and SOAP notes, and a treatment plan.

Users can select different forms, either 1 or multiple, then select one of the pre-set AI Tools to see the analytic output(s).



The screenshot shows the 'Client Summary' page for a client named Fred Broccoli. At the top, there are two buttons: 'Select Different Client' and 'AI Tools'. A red arrow points to the 'AI Tools' button. Below the buttons, client information is displayed: Selected Client: Broccoli, Fred; DOB: 03/03/2000; Age: 23; Email: fredbroccoli@hotmail.com; Phone: 4029596566. There is a profile picture of a man holding a broccoli. Below the client info, there is an 'Upload File' button and a search bar. A table lists forms with columns: Form Name, Created By, Date Created, Date Due, Status, Portal, and Actions. The 'Addiction Severity Index' form is selected with a checkmark. A red arrow points to the checkmark.

| <input type="checkbox"/> | Form Name | Created By | Date Created | Date Due | Status | Portal | Actions |
|-------------------------------------|--|------------|--------------|------------|-------------|--------|---------|
| <input checked="" type="checkbox"/> | Addiction Severity Index | Paul Le | 01/12/2024 | | In Progress | | |
| <input type="checkbox"/> | CAGE Substance Abuse Screening Tool | Paul Le | 01/04/2024 | 01/05/2024 | In Progress | | |
| <input type="checkbox"/> | Patient Health Questionnaire-9 (PHQ-9) | Paul Le | 01/04/2024 | 01/05/2024 | To Do | | |



The screenshot shows a blue dropdown menu titled 'AI Tools'. It contains five options: 'Biopsychosocial Narrative Report', 'MDA Narrative Report', 'DAP', 'SOAP', and 'Treatment Plan'. A red arrow points to the 'Biopsychosocial Narrative Report' option.

Once you've generated the AI output, you can save the content back into the form, or other formats (depending on the AI Tool chosen).

AI Tools

H₁ H₂ B I U

Presenting Situation:

Fred Broccoli, a 42-year-old white male, was referred for evaluation due to issues related to substance abuse and legal involvement.

Medical Status:

Fred reports a history of two hospitalizations, with the most recent being two years and two months ago due to a broken rib. He has chronic high blood pressure and takes Loratadine for this condition. Fred does not receive financial compensation for any physical disability.

Employment/Support Status:

Fred completed 12 years of education and has 2 years of technical education. He works as a welder, possesses a valid driver's license, and has access to an automobile. He has been employed full-time for 5 years. There is no information about financial support from others or current employment status.

Drug/Alcohol Use:

Fred began using alcohol at the age of 14 and reports using alcohol for 20 years. He admits to using alcohol for 10 days in the past 30 days. There is no information about other substance use.

Legal Status:

Fred has a history of criminal justice involvement, with multiple arrests and charges, including shoplifting/vandalism/theft and parole/probation violations.

Family History:

There is no indication of significant problems related to alcohol, drugs, or psychological issues within Fred's family history.

Family/Social Relationships:

There is no available information regarding Fred's marital status, living arrangements, or relationships with family and friends.

Psychiatric Status:

← Back

Save to:

Addiction Severity Index

Cancel Copy Save

Saving the narrative to the Addiction Severity Index Assessment, will populate built-in text editor in the ASI Assessment. The text editor allows users to make modifications to the narrative, which is included in the assessment.

Addiction Severity Index

General Medical Employment Drug/Alcohol Legal Family History Family/Social Psychiatric Interviewer's Assessment

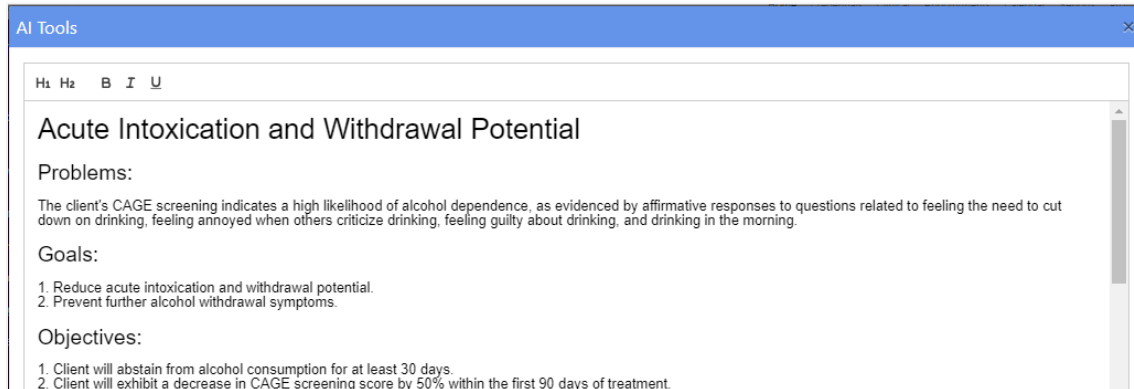
Diagnostic Impressions Recommendation Narrative Summary

H₁ H₂ B I U

Presenting Situation:

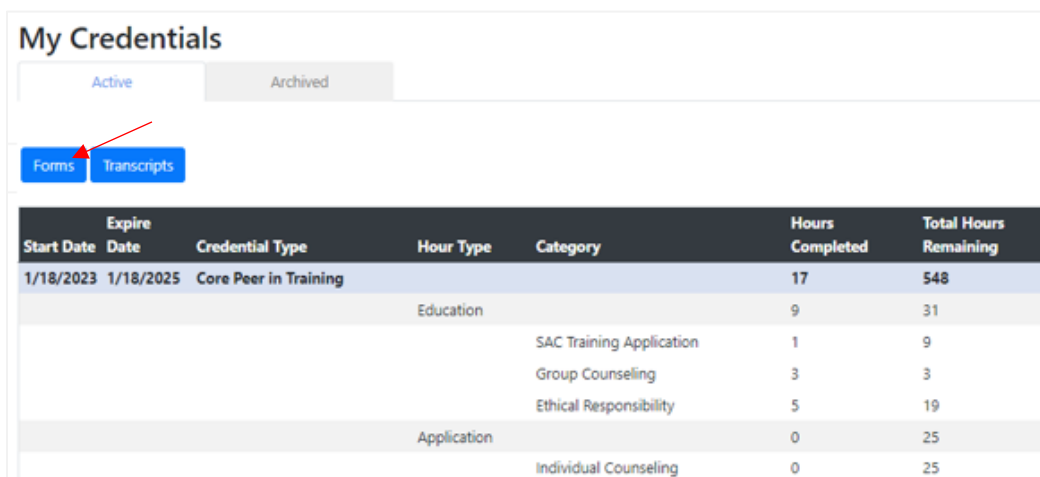
Fred Broccoli, a 32-year-old male, was referred for evaluation by [Referral Source's Name] for assessment due to reasons [Reason for Assessment]. The interview took place on [Date of Interview] at [Interview Start Time]. Fred has a history of 2 hospitalizations, with the most recent being 2 years and 2 months ago for a broken rib. He reports chronic medical problems, including high blood pressure for which he takes Loratadine. He has a history of substance use, with the first use of alcohol at the age of 14. Fred has a profession as a welder, holds a valid driver's license, and has been employed full-time for 5 years. He has financial compensation for a physical disability and has reported no significant distortion in his medical status.

Users can select a variety of forms and then select the AI Tools to view different reports and outputs for their use. The example below is a Treatment Plan automatically written from selecting the CAGE screening tool and the Treatment Plan AI Tool.

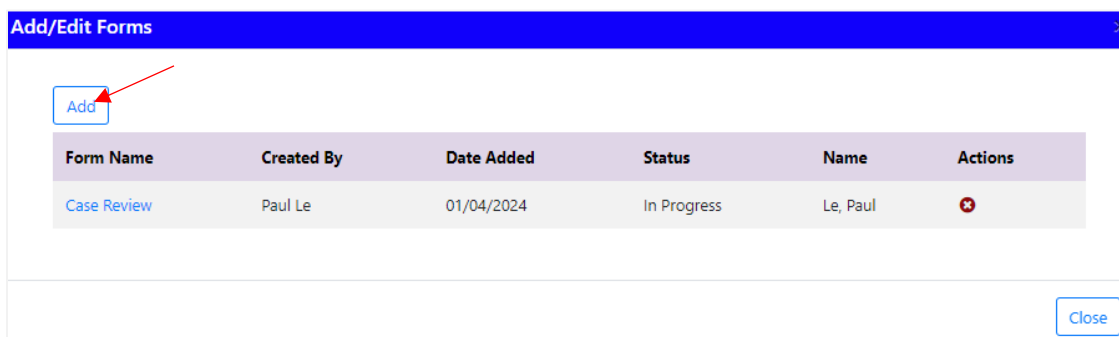


Custom Forms in Professional Development

In addition to clinical features, users can add custom forms to professional development functions of OakTree. Currently, in the Credentials module, there is a new FORMS button. Users can select this button to administer a form that is specific to a user (as opposed to a client)



Once they select Forms, they'll be able to add a new form, and/or see a list of forms that have already administered.



Client Demographics: Attributes

A new field was added to Client Demographics called Attributes. This allows users to assign additional attributes to the client as part of their master record. This field can be customized to display any attributes, such as languages spoken, alumni, funding source, etc. This will be valuable in reporting and other tools in the system in the future.

The screenshot shows a form with several sections. On the left, there are dropdown menus for Work Status, Department, Race, and Marital Status. In the middle, there are dropdown menus for Tribal Affiliation/Enrollment, Religion, and Ethnicity. On the right, there are sections for Tribal Affiliation Other, Religion Other, and Language. Below these is the 'Attributes' section, which has a dropdown menu currently set to 'None selected'. A red arrow points to this dropdown, and another red arrow points to the 'English Speaking' checkbox option in the dropdown menu. Below the Attributes section, there is a section for 'Contact Information - Physical Address'.

User Profile Access for Super Admins

Users with Super Admin access or Supervisors with authorized access can view another user's Profile. This is beneficial for running reports and quality assurance. To view other users's Profile (with appropriate security access), the user can select the Profile icon in the top ribbon, then "Other Profiles". Then choose the user and select [Display]. If you are making any edits to the profile, be sure to select the [Update All Changes] button.

The screenshot shows the OakTree Practice Management interface. At the top, there is a navigation ribbon with icons for Home, Credentials, Clinical, Appointments, Calendar, Reports, and Profile. A red arrow points to the Profile icon. Below the ribbon, the 'Profile' section is visible. It shows a dropdown menu with 'Able, Sally' selected. A red arrow points to the dropdown arrow. To the right of the dropdown is a 'Display' button. Below the dropdown, there is a list of other users: Adams, Ron; Alanstone, Rob; Barford, Joan; Barlow, Barry. To the right of this list, there is a summary of the selected user's profile: Agency: Orion Health and Wellness Center; Location: Orion South; Role: Super Admin. A red arrow points to the Profile icon in the ribbon.