How to Upload Files to a Client Record

Once you have started to use OakTree you may need to upload documents. In OakTree we provide the means to upload and attach PDF, JPG, Jpeg, and PNG-type files.

1) To Start – Go to the Clinical



2) Next, click My Caseload and select a client

My Caseload						
Add Client	Please Select Client Below: DOB: Email:		Age: Phone:			
Client Communications Clinical Forms	Add Client	how All Clients			Search	÷
🚢 Client Chart 📏	Name 2	DOB	Age	Case Management Role	Date Assigned	 Actions
Send Forms	Appletop, Allison	02/23/2000	23	Primary Case Manager	01/02/2024	🗹 🖪 🖿

3) Once you see your caseload load – select the client then click the Client Summary link

☆ Home >	My Caseload					
Add Client	Selected Client: 🔒	Appletop, Allison	Age:			
My Workflow	02/23/2000 Email: aappletop@hotmial.org		23 Phone: 4024335567	,		
Client Communications Clinical Forms	Add Client	now All Clients			Search	÷
🛎 Client Chart 📏	Name 1	DOB	Age	Case Management Role	Date Assigned	 Actions
Send Forms	Appletop, Allison	02/23/2000	23	Primary Case Manager	01/02/2024	12 🔺 🖿
Case Management	Showing 1 to 1 of 1 rows					
Client Information Client Scoring						
Client Summary						

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4) Click the [Upload File] button to open the Dialog box

# Home C	Client Summary				
My Caseload					
Add Client	elect Different Client	7 AI loois			
🗠 My Workflow 📏	Selected Client:	Appletop, Allison			
Democratica	02/23/2000	23			
Demographics	Email:	Phone:			
Client Communications	aappletop@hotmial.org 4024335567				
Clinical Forms					
🚢 Client Chart 📏	> Upload File				
Send Forms	Form Name	Created By			
Case Management	Treatment Plan	Ron Admin			
Client Information	Well-Being Ass	Ron Admin			
Client Scoring	C Weir being Ass	Cosment Non Admin			
Client Summary	Addiction Seve	rity Index Ron Admin			
	_				

5) Choose one or more files and save them to the client's record.

	Upload File	×
	Select File to Upload:	
1	Choose File No file chosen	
_	Description:	
2		I
	Document Author:	
3		Calendar
	Document Created:	
4	01/29/2024	
F	Comments:	
		le le
6	✓ Make this Visible in Portal	7 8 9
		Upload and Close Upload and Next Cancel

- Choose the file to upload from your computer
- 2. Type in a Description and create the form name
- 3. Type in the Document Author
- 4. Either accept the date given or change it by clicking the calendar icon
- 5. Type in comments if needed
- Keep the default check if you like to also keep this document visible in the client portal
- 7. Upload one image
- 8. Upload multiple images
- 9. Cancel

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