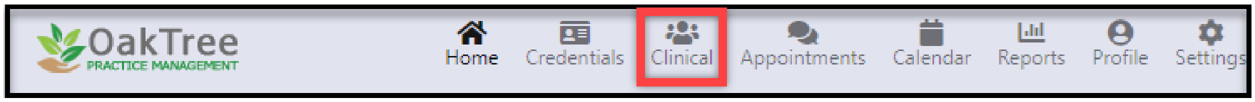
How to Upload Files to a Client Record

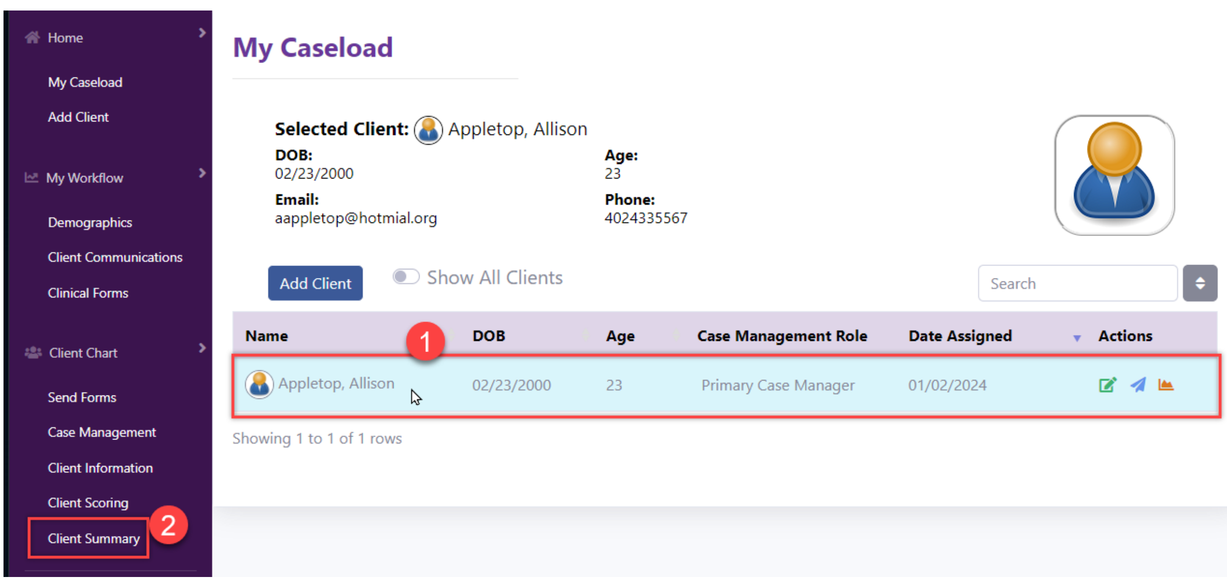
Once you have started to use OakTree you may need to upload documents. In OakTree we provide the means to upload and attach PDF, JPG, Jpeg, and PNG-type files.

1) To Start – Go to the Clinical



2) Next, click My Caseload and select a client

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



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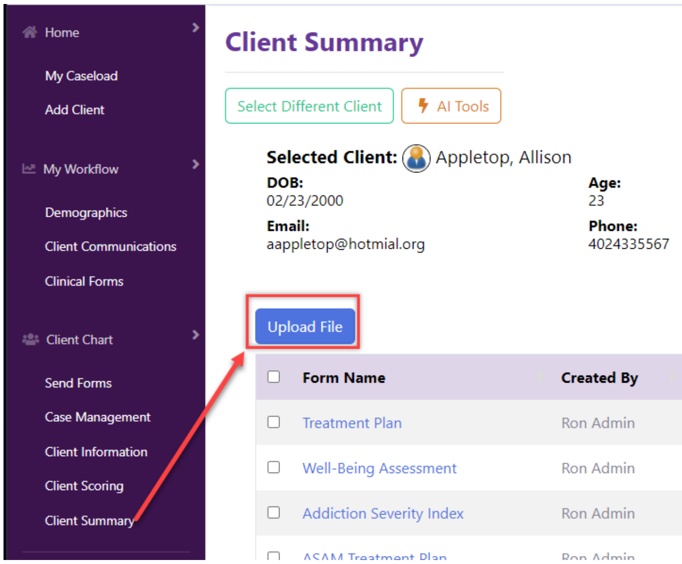
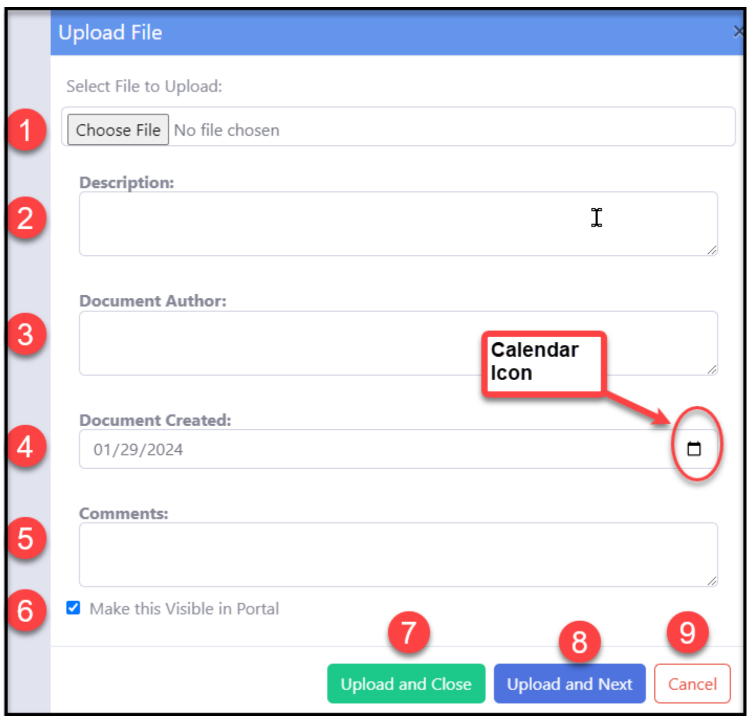
4) Click the [Upload File] button to open the Dialog box



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



1. 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
6. 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!