Release Notes: OakTree Practice Management v3.0

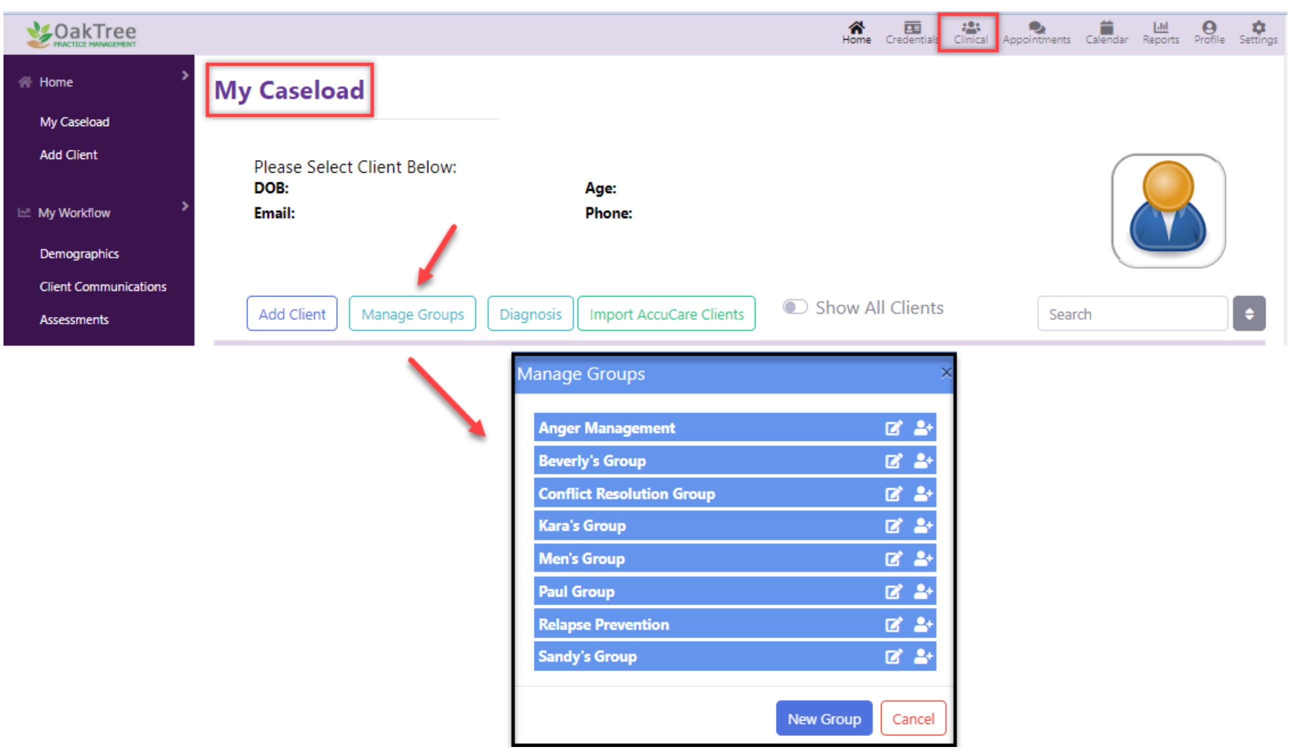
Enhancements and Bug Fixes - Summary

In this recent update, there were numerous maintenance and bug fixes, including:

- Updates to the code base infrastructure (for added security and stability for improved internet protocols)
- New Feature: Manage Groups
- New Feature: Centralized Diagnosis
- New Feature: Attaching Forms to Transcripts
- New Feature: Client import infrastructure (for AccuCare and future systems)
- Additional Screening Tools (CES-D Scale, CAGE-AID, Gambling, DVRNA and more)
- General maintenance and bug fixes

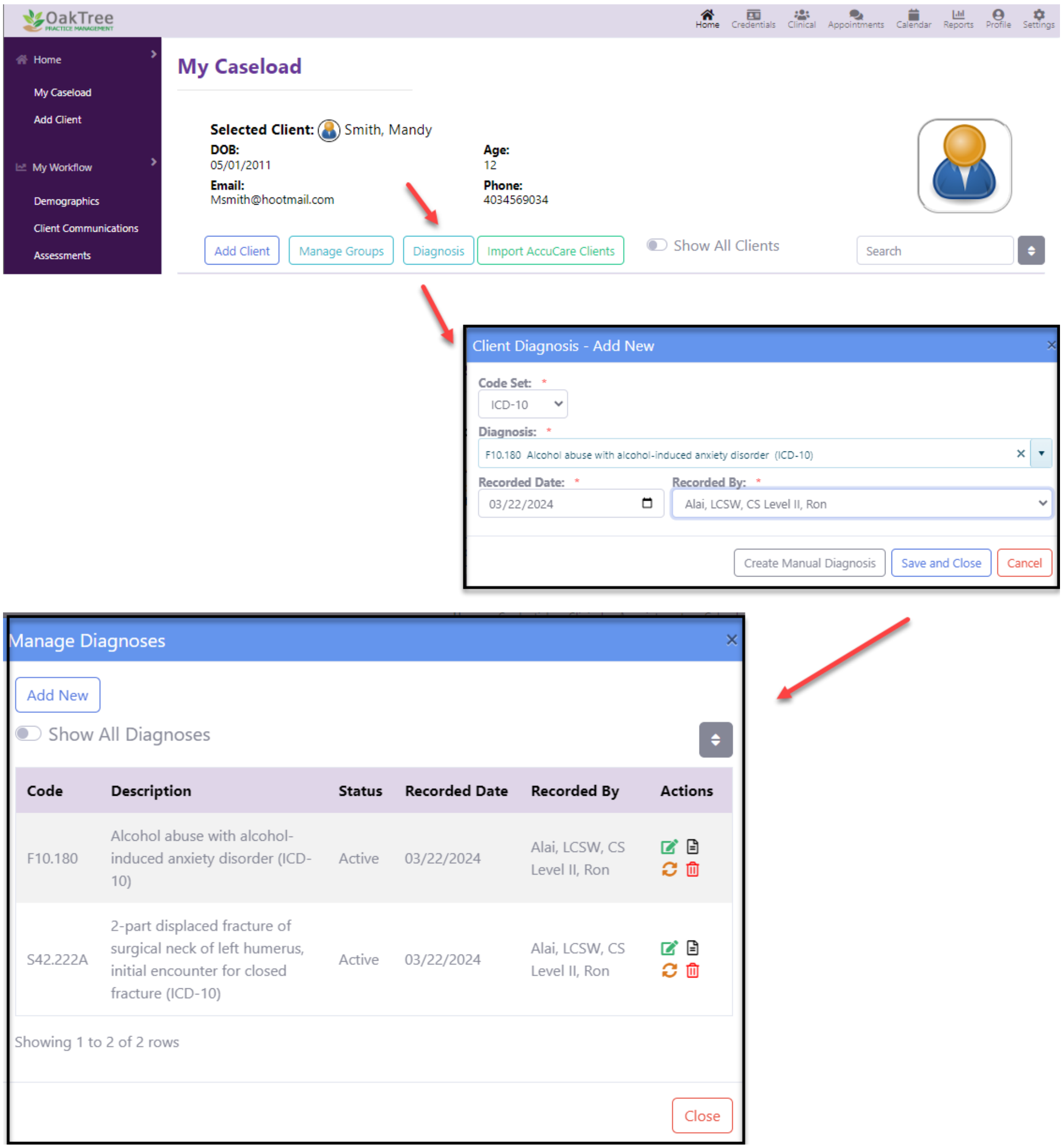
Managed Groups

This module allows you to create your groups of clients to pull into group notes.
You will be able to create your group name and add clients to the group. You will find the [Manage Group] button located under Clinical – My Caseload.



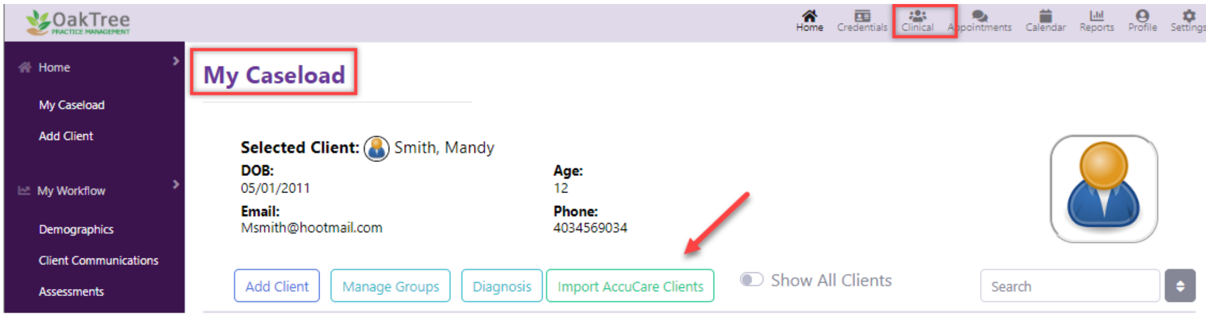
Centralized Diagnosis

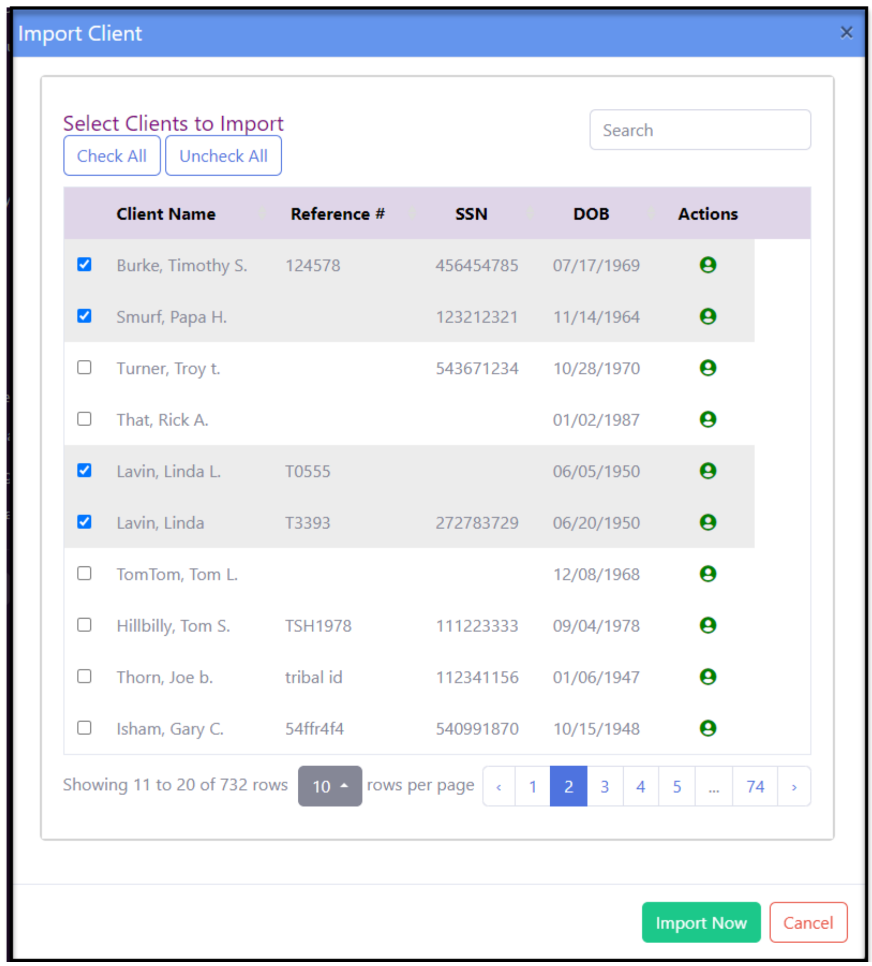
This module allows you to add and edit one or more diagnoses to your client record. The diagnosis will follow the client's progress in a future release. You will be able to pull from both ICD-10 and DSM-5-TR Code Sets.



Client Import AccuCare Clients

If you are moving from an existing AccuCare database you will be able to import your client's demographics by selecting one, multiple, or all clients.



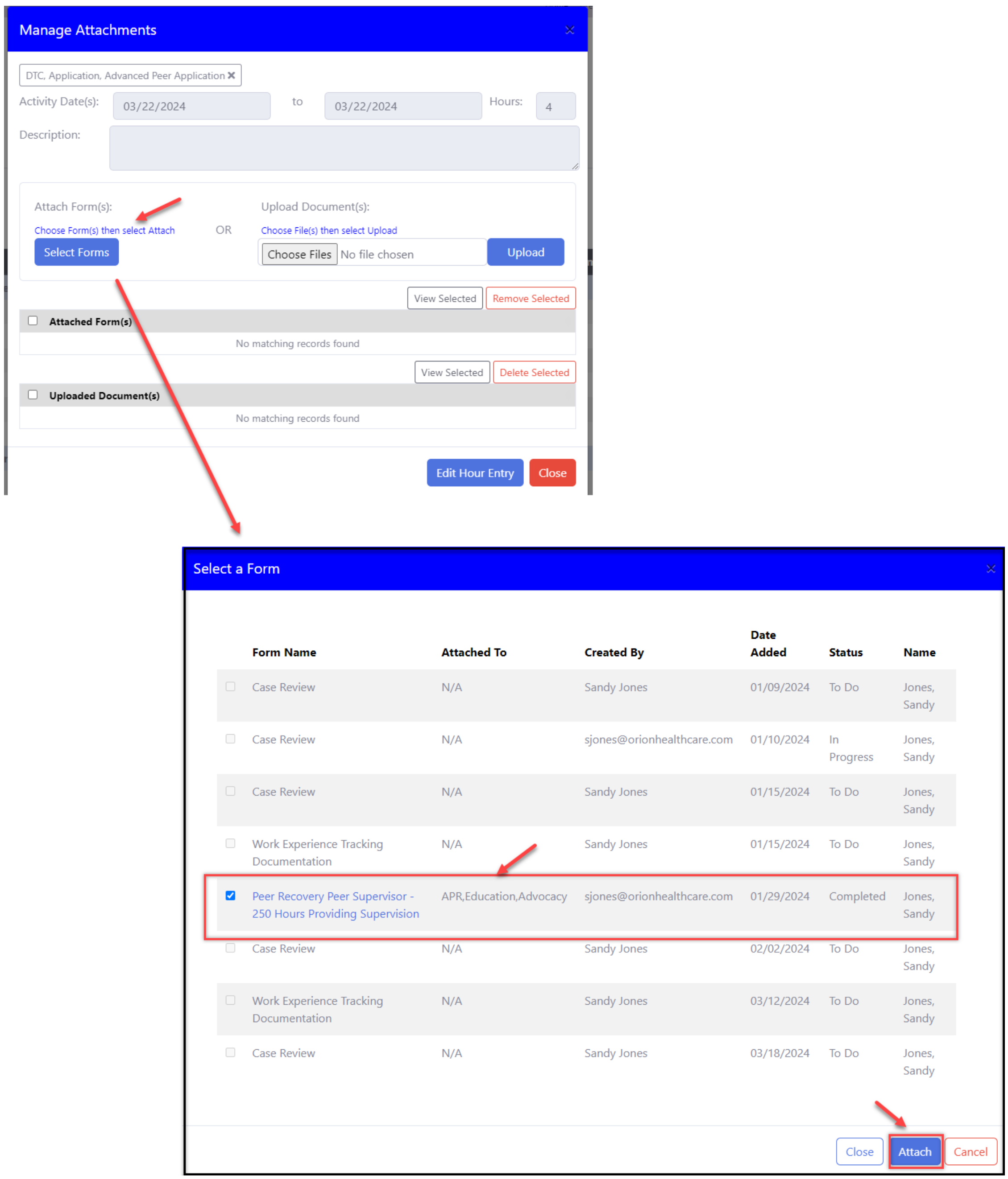


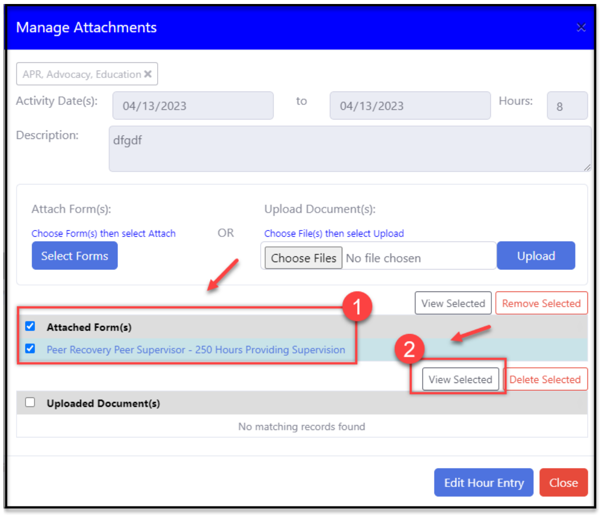
Professional Development: Attaching Forms to Transcripts (Credential Hours)

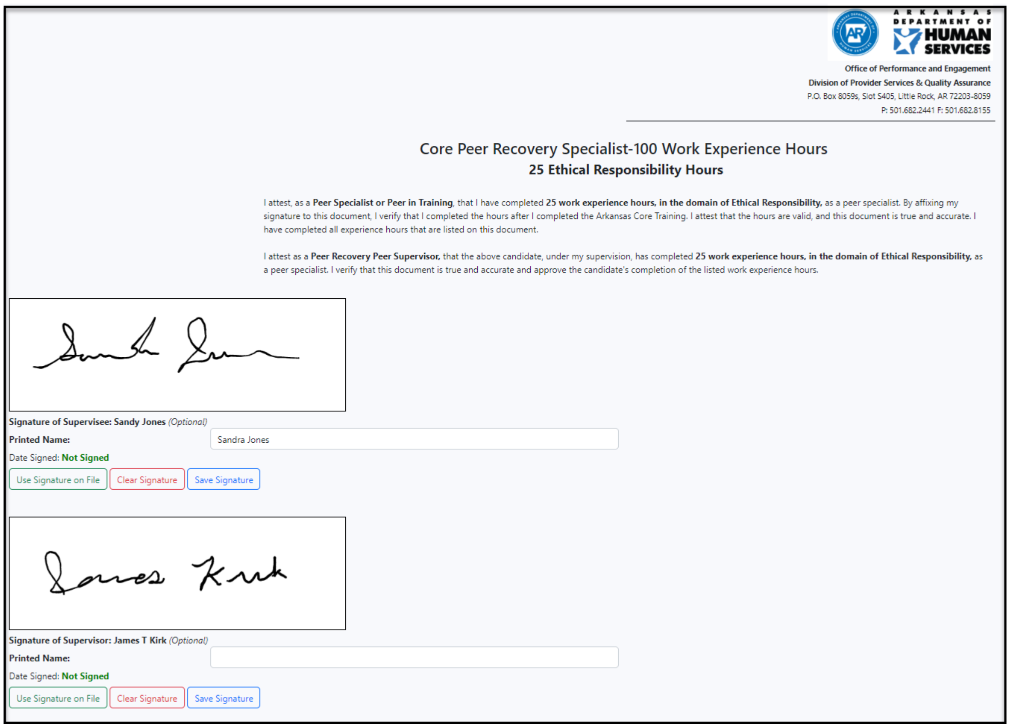
Now when applying hours to your Credentials, you can select one of the Professional Forms to attach to your transcript. This allows users to attach an existing form AND/OR upload an external document (as before) to a transcript.

When Applying Hours for your credentials, then selecting [Save and Upload/Manage Attachments], you'll have a new function to select a form to attach. This could be any custom form in the professional development segment of OakTree. Users can still attach external files (such as training certificates, etc.). They will have both options.

NOTE: Only Professional Forms that have been completed (meaning they are locked and cannot be edited) are able to be attached to transcripts.







New Screening Tools Added

Now, users will have access to additional screening/evaluation tools. Those include:

- **CES-D Scale** - Center for Epidemiologic Studies Depression Scale (CES-D Scale)
- **Gambling** - Gambler Anonymous and Love Someone
- **DVRNA**- Domestic Violence Risk and Needs Assessment

** Coming Soon: Look for these features in future updates **

- Progress Notes (Individual and Group) with check-in and calendar appointment integration
- Batch e-signature of progress notes
- Medication management – adding medications, allergies, and vitals