

## Release Notes: OakTree Practice Management v3.0

### Enhancements and Bug Fixes - Summary

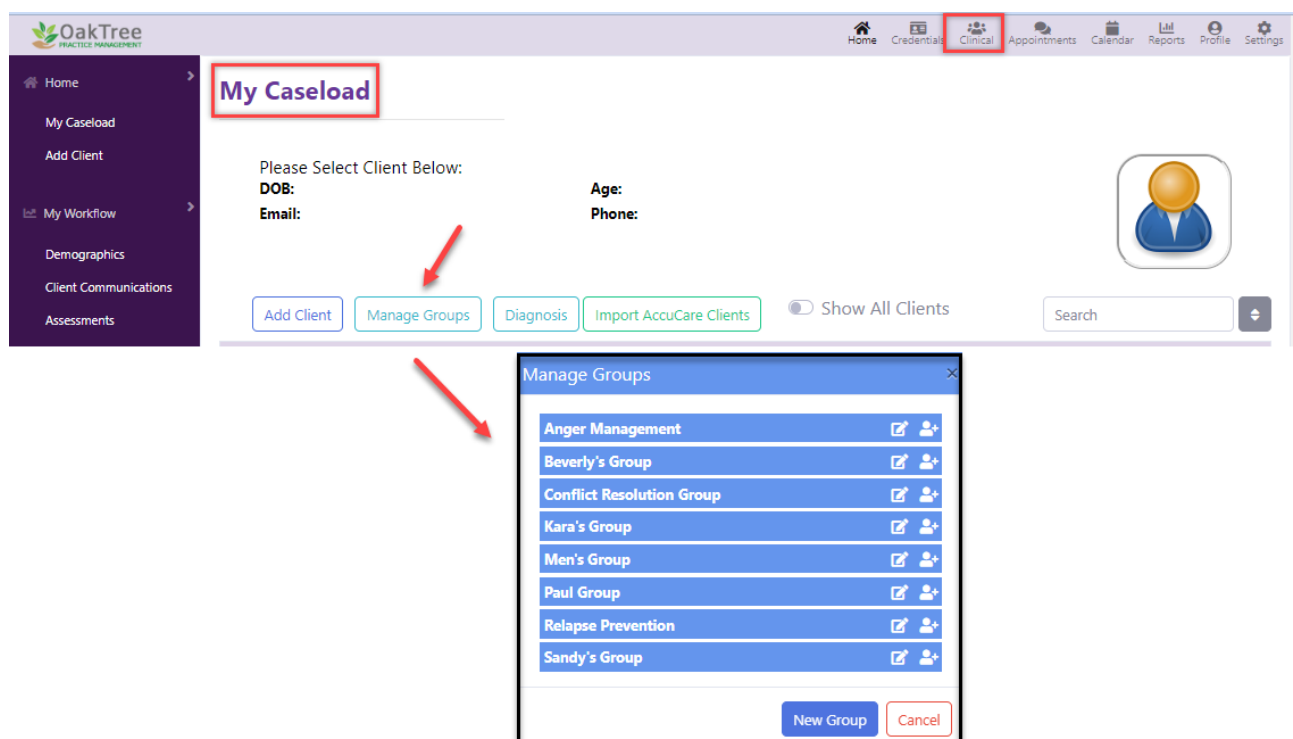
In this recent update, there were numerous maintenance and bug fixes, including:

- 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.



The screenshot displays the OakTree Practice Management interface. The top navigation bar includes Home, Credentials, Clinical (highlighted with a red box), Appointments, Calendar, Reports, Profile, and Settings. The left sidebar lists Home, My Caseload, Add Client, My Workflow, Demographics, Client Communications, and Assessments. The main content area is titled 'My Caseload' and contains a form for client selection with fields for DOB, Email, Age, and Phone. Below the form are buttons for 'Add Client', 'Manage Groups', 'Diagnosis', and 'Import AccuCare Clients', along with a 'Show All Clients' toggle and a search box. A red arrow points from the 'Manage Groups' button to a modal window titled 'Manage Groups'. This modal lists several existing groups: Anger Management, Beverly's Group, Conflict Resolution Group, Kara's Group, Men's Group, Paul Group, Relapse Prevention, and Sandy's Group. Each group entry has an edit icon and a plus icon. At the bottom of the modal are 'New Group' and 'Cancel' buttons.

## 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.

**My Caseload**

**Selected Client:** Smith, Mandy

**DOB:** 05/01/2011

**Age:** 12

**Email:** Msmith@hootmail.com

**Phone:** 4034569034

[Add Client](#) [Manage Groups](#) [Diagnosis](#) [Import AccuCare Clients](#)  Show All Clients

**Client Diagnosis - Add New**

**Code Set:** ICD-10

**Diagnosis:** F10.180 Alcohol abuse with alcohol-induced anxiety disorder (ICD-10)

**Recorded Date:** 03/22/2024

**Recorded By:** Alai, LCSW, CS Level II, Ron

[Create Manual Diagnosis](#) [Save and Close](#) [Cancel](#)

**Manage Diagnoses**

[Add New](#)  Show All Diagnoses

Code	Description	Status	Recorded Date	Recorded By	Actions
F10.180	Alcohol abuse with alcohol-induced anxiety disorder (ICD-10)	Active	03/22/2024	Alai, LCSW, CS Level II, Ron	
S42.222A	2-part displaced fracture of surgical neck of left humerus, initial encounter for closed fracture (ICD-10)	Active	03/22/2024	Alai, LCSW, CS Level II, Ron	

Showing 1 to 2 of 2 rows

[Close](#)

## 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.

**My Caseload**

**Selected Client:** Smith, Mandy

**DOB:** 05/01/2011      **Age:** 12

**Email:** Msmith@hootmail.com      **Phone:** 4034569034

[Add Client](#) [Manage Groups](#) [Diagnosis](#) [Import AccuCare Clients](#)  Show All Clients

**Import Client**

Select Clients to Import

Client Name	Reference #	SSN	DOB	Actions
<input checked="" type="checkbox"/> Burke, Timothy S.	124578	456454785	07/17/1969	
<input checked="" type="checkbox"/> Smurf, Papa H.		123212321	11/14/1964	
<input type="checkbox"/> Turner, Troy t.		543671234	10/28/1970	
<input type="checkbox"/> That, Rick A.			01/02/1987	
<input checked="" type="checkbox"/> Lavin, Linda L.	T0555		06/05/1950	
<input checked="" type="checkbox"/> Lavin, Linda	T3393	272783729	06/20/1950	
<input type="checkbox"/> TomTom, Tom L.			12/08/1968	
<input type="checkbox"/> Hillbilly, Tom S.	TSH1978	111223333	09/04/1978	
<input type="checkbox"/> Thorn, Joe b.	tribal id	112341156	01/06/1947	
<input type="checkbox"/> Isham, Gary C.	54ffr4f4	540991870	10/15/1948	

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## 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.

**Manage Attachments**

DTC, Application, Advanced Peer Application ✕

Activity Date(s): 03/22/2024 to 03/22/2024 Hours: 4

Description:

Attach Form(s): **Choose Form(s) then select Attach** OR Upload Document(s): **Choose File(s) then select Upload**

No file chosen

**Attached Form(s)**

No matching records found

**Uploaded Document(s)**

No matching records found

**Select a Form**

Form Name	Attached To	Created By	Date Added	Status	Name
<input type="checkbox"/> Case Review	N/A	Sandy Jones	01/09/2024	To Do	Jones, Sandy
<input type="checkbox"/> Case Review	N/A	sjones@orionhealthcare.com	01/10/2024	In Progress	Jones, Sandy
<input type="checkbox"/> Case Review	N/A	Sandy Jones	01/15/2024	To Do	Jones, Sandy
<input type="checkbox"/> Work Experience Tracking Documentation	N/A	Sandy Jones	01/15/2024	To Do	Jones, Sandy
<input checked="" type="checkbox"/> Peer Recovery Peer Supervisor - 250 Hours Providing Supervision	APR,Education,Advocacy	sjones@orionhealthcare.com	01/29/2024	Completed	Jones, Sandy
<input type="checkbox"/> Case Review	N/A	Sandy Jones	02/02/2024	To Do	Jones, Sandy
<input type="checkbox"/> Work Experience Tracking Documentation	N/A	Sandy Jones	03/12/2024	To Do	Jones, Sandy
<input type="checkbox"/> Case Review	N/A	Sandy Jones	03/18/2024	To Do	Jones, Sandy

**Manage Attachments**

APR, Advocacy, Education X

Activity Date(s): 04/13/2023 to 04/13/2023 Hours: 8

Description: dfgdf

Attach Form(s): Choose Form(s) then select Attach OR Upload Document(s): Choose File(s) then select Upload

Select Forms No file chosen Upload

Attached Form(s)  Uploaded Document(s)

Peer Recovery Peer Supervisor - 250 Hours Providing Supervision

No matching records found

Edit Hour Entry Close

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**Core Peer Recovery Specialist-100 Work Experience Hours**  
**25 Ethical Responsibility Hours**

I attest, as a Peer Specialist or Peer in Training, that I have completed 25 work experience hours, in the domain of Ethical Responsibility, as a peer specialist. By affixing my signature to this document, I verify that I completed the hours after I completed the Arkansas Core Training. I attest that the hours are valid, and this document is true and accurate. I have completed all experience hours that are listed on this document.

I attest as a Peer Recovery Peer Supervisor, that the above candidate, under my supervision, has completed 25 work experience hours, in the domain of Ethical Responsibility, as a peer specialist. I verify that this document is true and accurate and approve the candidate's completion of the listed work experience hours.

*Sandy Jones*

Signature of Supervisor: Sandy Jones (Optional)  
Printed Name: Sandra Jones  
Date Signed: Not Signed  
Use Signature on File Clear Signature Save Signature

*James T Kirk*

Signature of Supervisor: James T Kirk (Optional)  
Printed Name:   
Date Signed: Not Signed  
Use Signature on File Clear Signature Save Signature

## 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