Release Notes: OakTree Practice Management v3.1

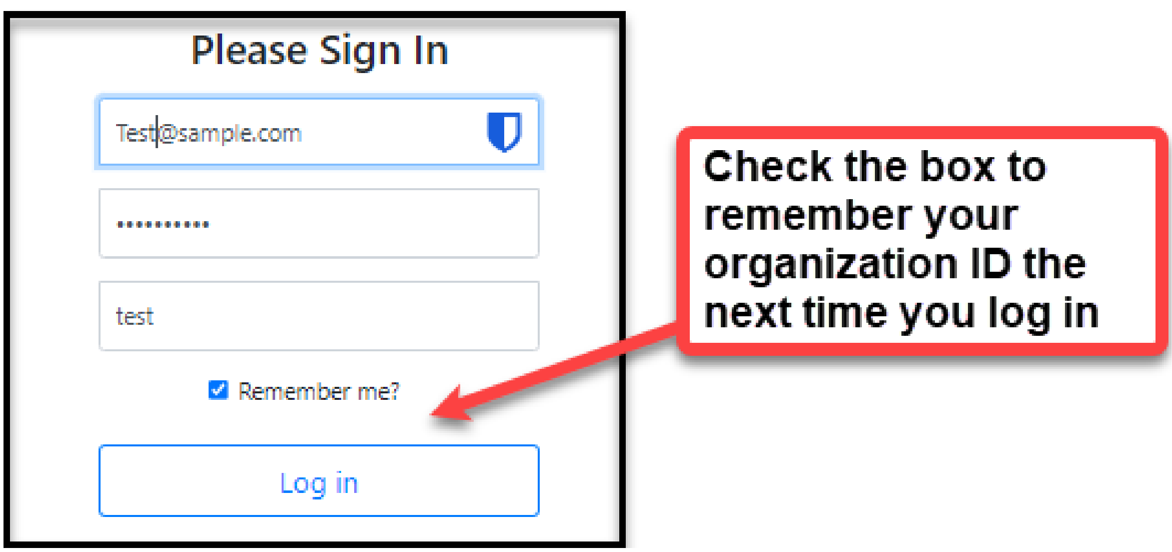
Enhancements and Bug Fixes - Summary

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: Sign-in Page
- New Feature – User Roles
- New Feature – Progress Notes
- New Feature – Medication
- Updated Client ID – Display and Search
- Updated Demographic – Date of Birth and Client Type validation
- Updated AI Tools – Report translator to include Spanish, Lakota, and Portuguese

Sign In Page – New Feature

Remember me checkbox, remembers the user's login credentials.



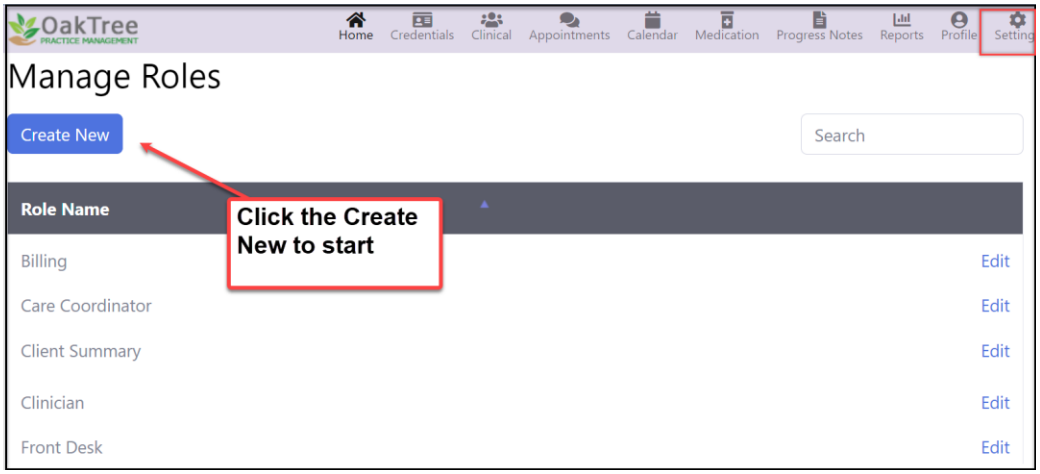
User Roles Setup – New Feature

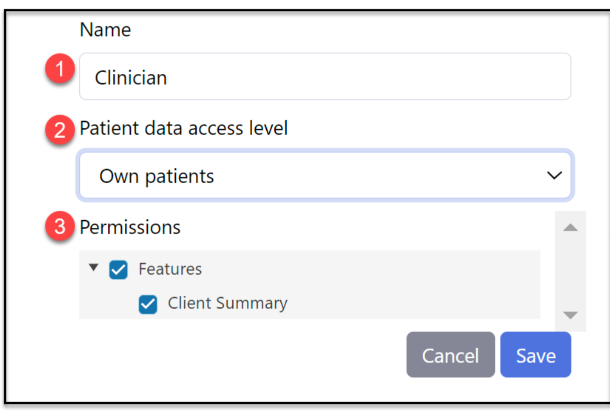
An organization can set up its own defined Role for users.

That role can be assigned to a user in the Manage Users.

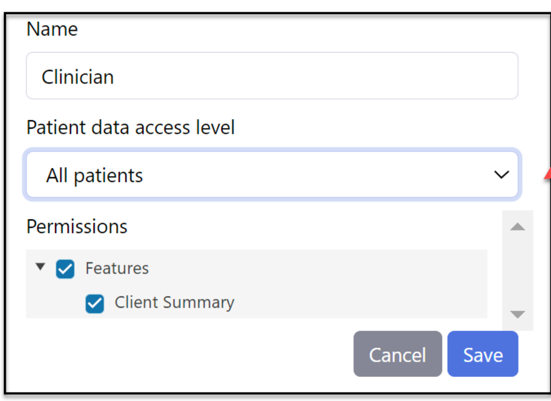
NOTE: If a user has Super Admin (User Level) they will not recognize any Roles assigned. This is for only users with a User Level that is not Super Admin.

You will find Roles under Settings





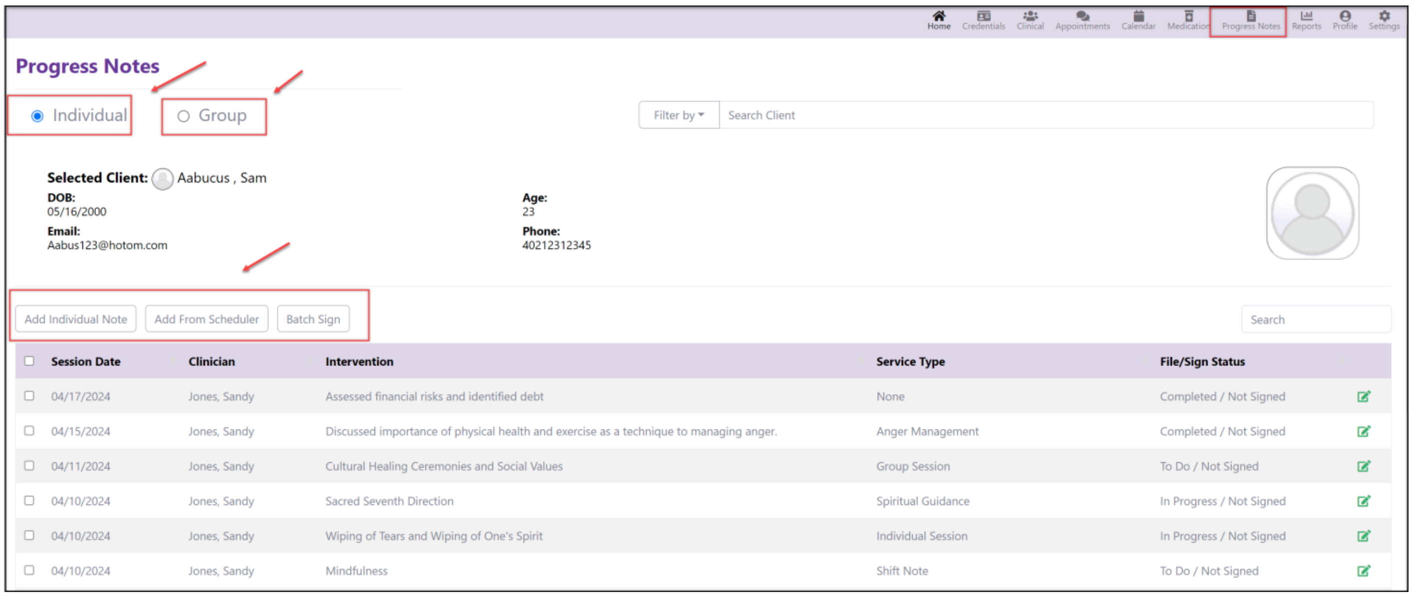
1) Create a name or label for the role
2) Assign client access to the role
   a. Own patients: the user will only be able to view clients that they are a Case Management team member for.
   b. All patients: the user will be able to view all clients in the system.
3) Select what modules this role has access to Client Summary



Progress Notes – New Module

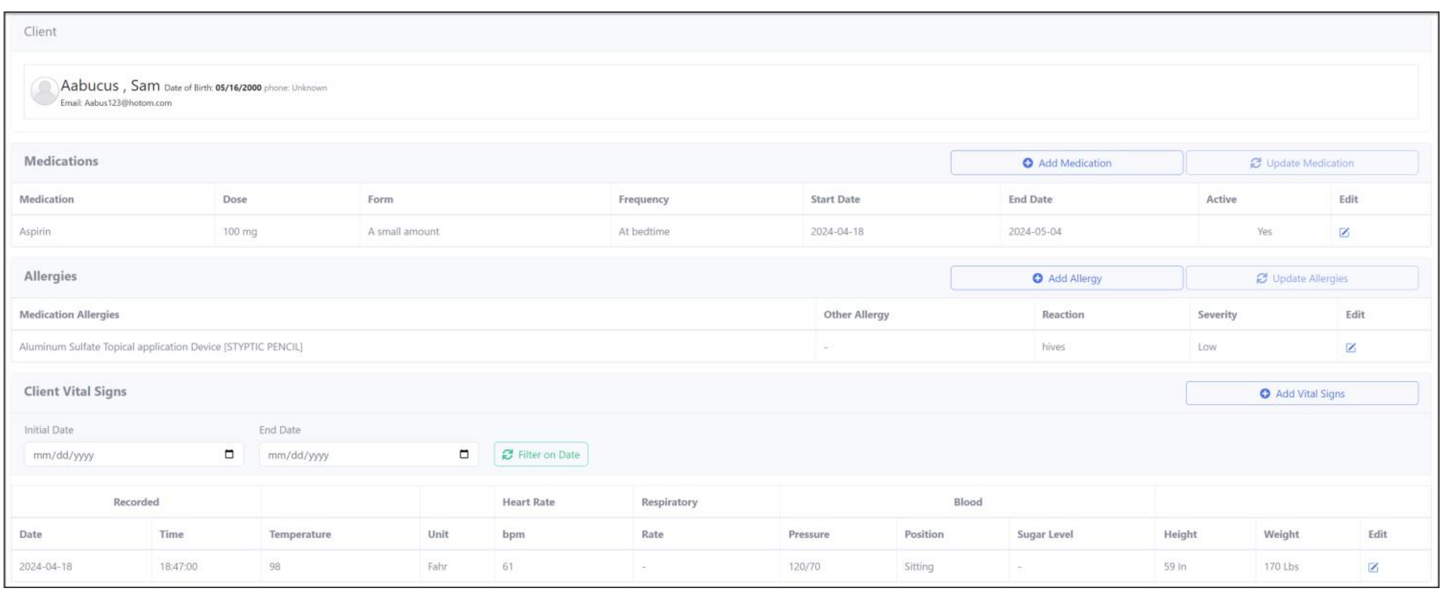
The Progress module can be seen by clicking the Progress Notes Icon on the menu ribbon. You will be able to:

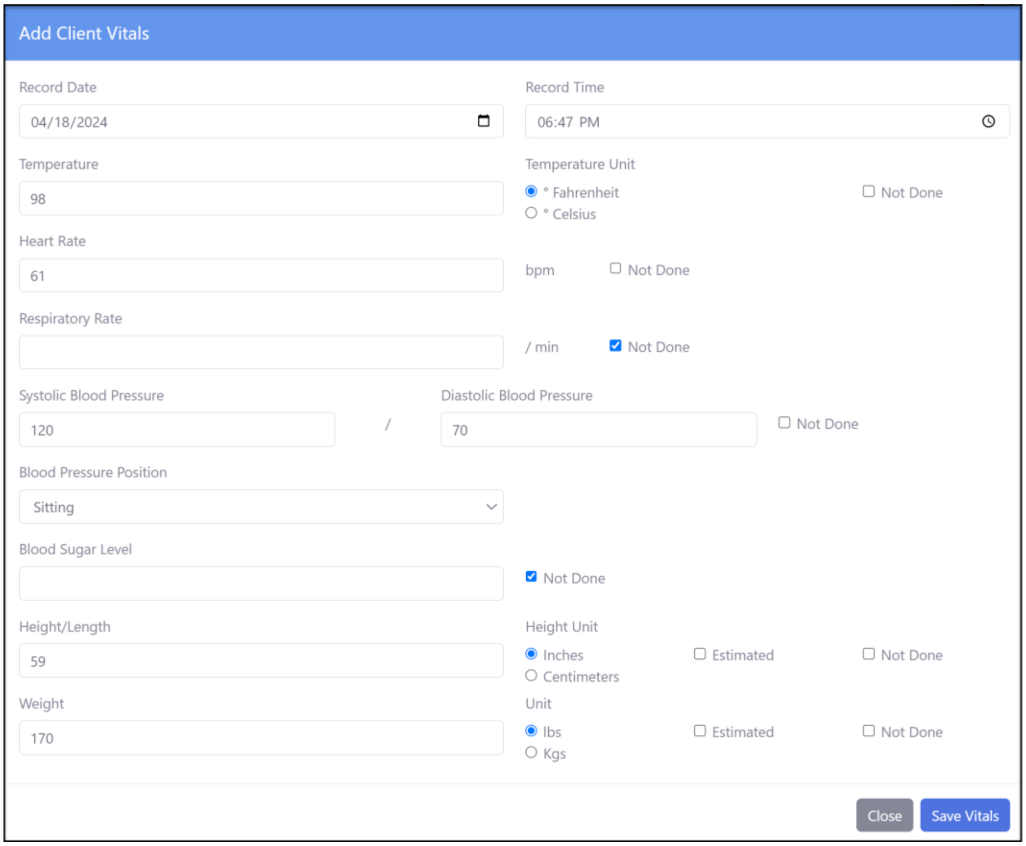
- Create individual Notes
- Group Note
- Add from Scheduler
- Batch Sign Individual notes



Medications – New Module

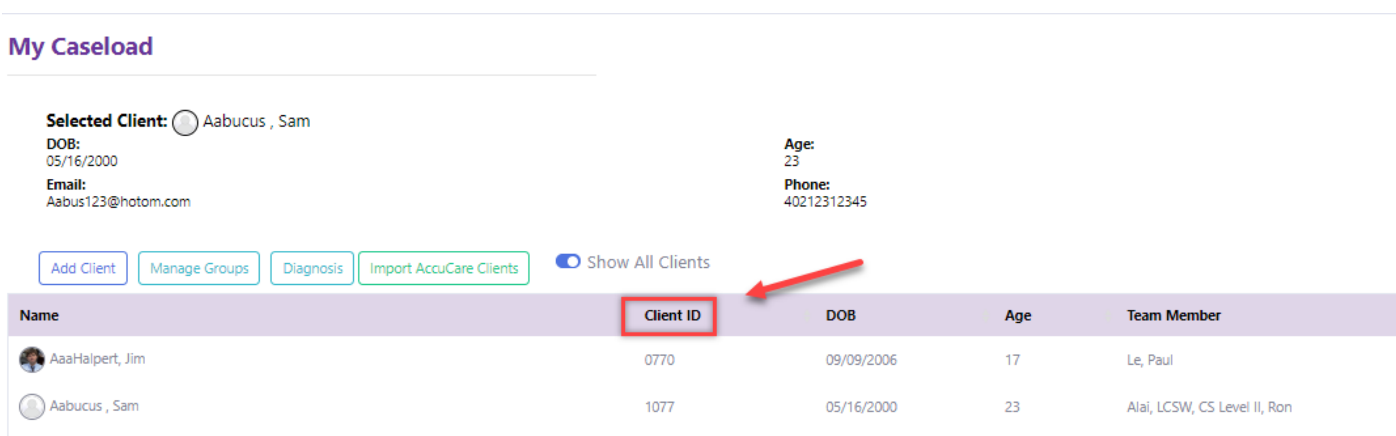
The Medication module enables the recording of medications, Allergies, and Client Vital Signs





Client ID – Display and Search

The Client ID field from Demographics is now displaying on the My Caseload grid.
You can sort it alphanumerically on the grid.
You can search for it in the search field on the My Caseload.
Reminder – Client ID is automatically assigned to a client once their Demographics record is edited. The number assigned is sequential based on the number of clients in the system. This value can be overridden. This field is only required when the user has marked it required in their demographic setup.



Demographics – Date of Birth and Client Type validation.

When the client's age is 18 years old or older and the Client Type selected is Student, then the user will receive a confirmation message when they attempt to Save. The message will prompt them to confirm if they still want to save even though the client's age is older than 17 AND the Client type selected is a student. All other combinations of these two fields (Date of Birth) and (Client Type) are acceptable and should not produce a confirmation message.