

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.



The screenshot shows a sign-in form titled "Please Sign In". It contains four input fields: an email field with "Test@sample.com" and a shield icon, a password field with ".....", a text field with "test", and a "Remember me?" checkbox which is checked. Below the fields is a "Log in" button.

Check the box to remember your organization ID the next time you log in

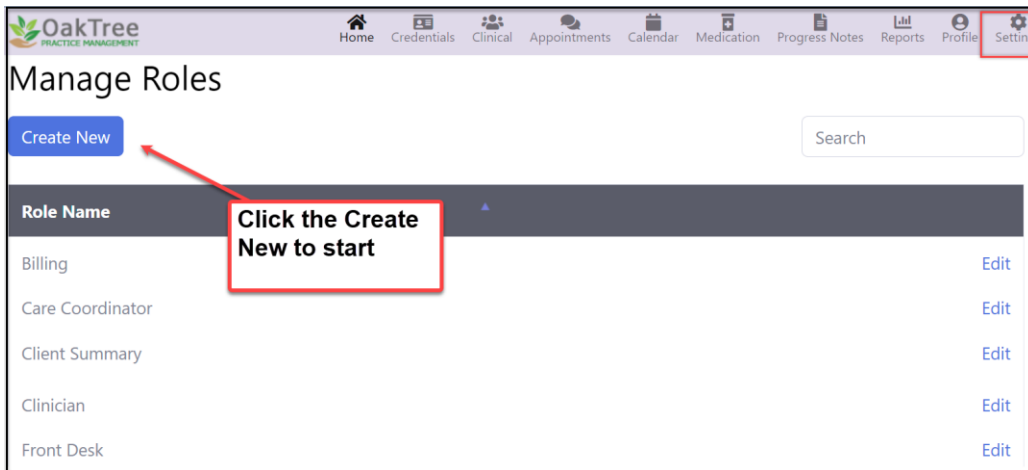
User Roles Setup – New Feature

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



Name

1 Clinician

2 Patient data access level

Own patients

3 Permissions

Features

Client Summary

Cancel Save

- 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

Name

Clinician

Patient data access level

All patients

Permissions

Features

Client Summary

Cancel Save

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

Session Date	Clinician	Intervention	Service Type	File/Sign Status
04/17/2024	Jones, Sandy	Assessed financial risks and identified debt	None	Completed / Not Signed
04/15/2024	Jones, Sandy	Discussed importance of physical health and exercise as a technique to managing anger.	Anger Management	Completed / Not Signed
04/11/2024	Jones, Sandy	Cultural Healing Ceremonies and Social Values	Group Session	To Do / Not Signed
04/10/2024	Jones, Sandy	Sacred Seventh Direction	Spiritual Guidance	In Progress / Not Signed
04/10/2024	Jones, Sandy	Wiping of Tears and Wiping of One's Spirit	Individual Session	In Progress / Not Signed
04/10/2024	Jones, Sandy	Mindfulness	Shift Note	To Do / Not Signed

Medications – New Module

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

Medication	Dose	Form	Frequency	Start Date	End Date	Active	Edit
Aspirin	100 mg	A small amount	At bedtime	2024-04-18	2024-05-04	Yes	Edit

Medication Allergies	Other Allergy	Reaction	Severity	Edit
Aluminum Sulfate Topical application Device [STYPTIC PENCIL]	-	hives	Low	Edit

Recorded		Heart Rate	Respiratory	Blood		Height	Weight	Edit			
Date	Time	Temperature	Unit	bpm	Rate	Pressure	Position	Sugar Level	Height	Weight	Edit
2024-04-18	18:47:00	98	Fahr	61	-	120/70	Sitting	-	59 in	170 Lbs	Edit

Add Client Vitals

Record Date: 04/18/2024 Record Time: 06:47 PM

Temperature: 98 Temperature Unit: Fahrenheit Celsius Not Done

Heart Rate: 61 bpm Not Done

Respiratory Rate: / min Not Done

Systolic Blood Pressure: 120 / Diastolic Blood Pressure: 70 Not Done

Blood Pressure Position: Sitting

Blood Sugar Level: Not Done

Height/Length: 59 Height Unit: Inches Centimeters Estimated Not Done

Weight: 170 Unit: lbs Kgs Estimated Not Done

Close Save Vitals

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.

My Caseload

Selected Client: Aabucus, Sam

DOB:
05/16/2000

Email:
Aabus123@hotmail.com

Age:
23

Phone:
40212312345

Add Client
Manage Groups
Diagnosis
Import AccuCare Clients
Show All Clients

Name	Client ID	DOB	Age	Team Member
AaaHalpert, Jim	0770	09/09/2006	17	Le, Paul
Aabucus, Sam	1077	05/16/2000	23	Alai, LCSW, CS Level II, Ron
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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.

Client

First Name *
Jack

Nickname
[Empty]

Title
Mr. [v]

Gender
Male [v]

Client Type
Student [v]

Student
School Staff
Adult College Student

Department

test.myoaktreeppractice.com says
The Client Type selected is Student and the Date of Birth indicates that they are 23 years old. Would you like to still Save?
OK Cancel