# Release Notes: OakTree Practice Management v3.2

## Enhancements and Bug Fixes - Summary

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

- New Feature: Main Menu
- New Feature: Client Intake Module
- New Feature: Episodes of Care (Admission/Transfer/Discharge)
- New Feature: Client Profile Header
- New Feature: Medication Management
- New Feature: Progress Notes Review and Sign off
- Additional Screening and Eval Tools (currently over 70+)
- Additional Reports: Clinical Summary of Services
- Various system optimization and bug fixes

1. **New Main Menu –** provides an intuitive and user-friendly interface to find the most used modules.
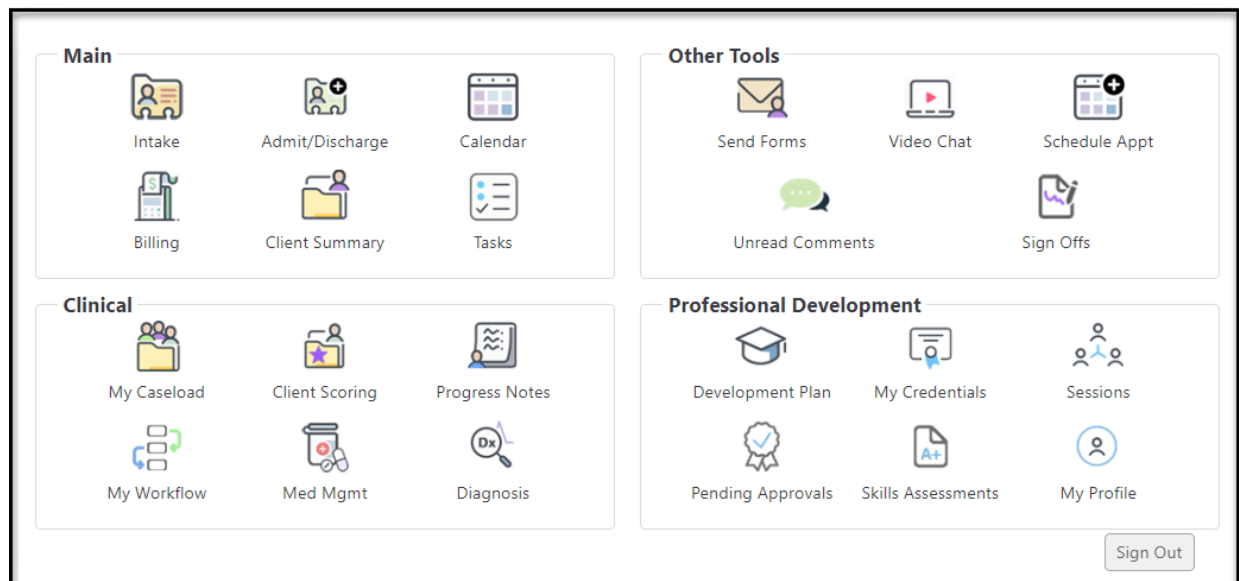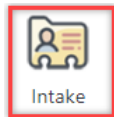
Billing module –
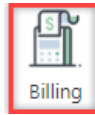
You will find new options under Settings to set up Billing Organizations, Locations of Service, Providers, Payers, and Service Code Setup. Included under the Billing menu you will find initial development of Billing Entry, A/R, and Client Billing Center modules with more features to be added in future releases.
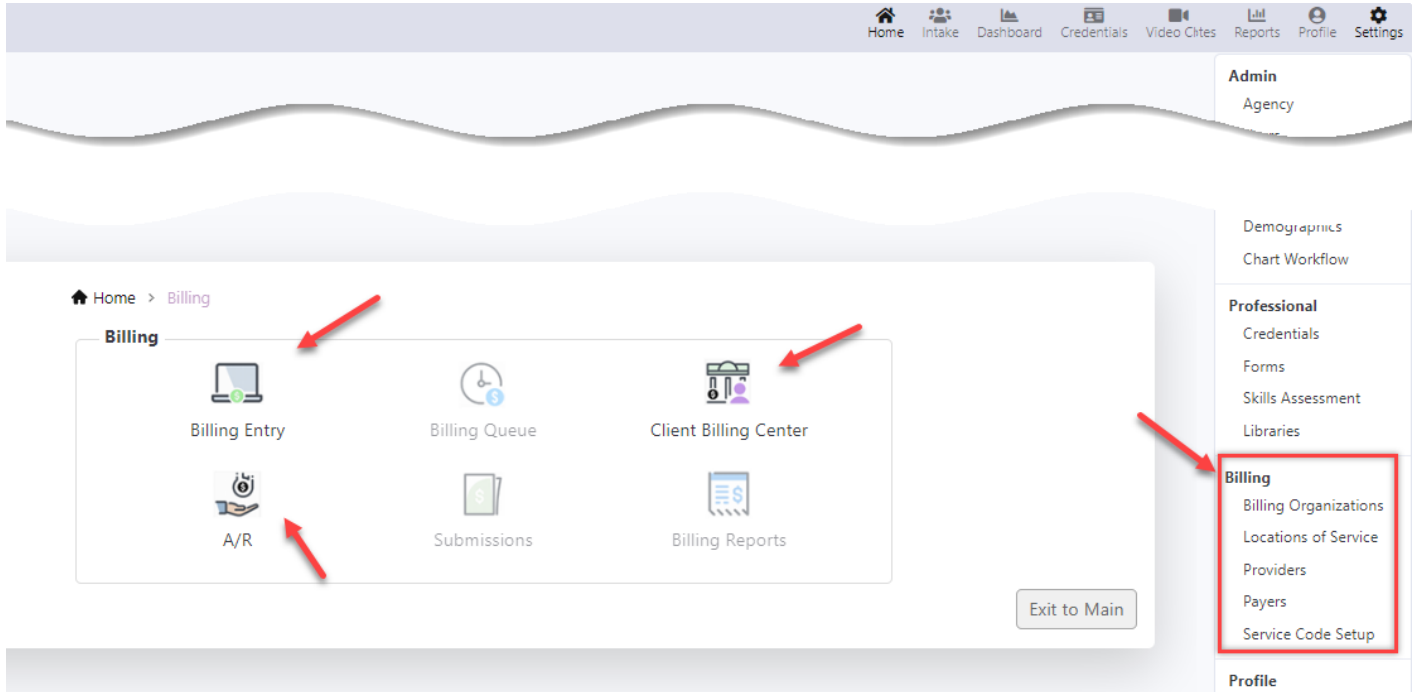
New Client Intake module –

We have centralized Client Intake to provide access to Demographics and Case Management including a location to add Billing information and Payers for quick reference. The Contacts Tab provides a place to enter contact information and referrals associated with the selected client. Comments create a place to author a note, document the date and time, and organize by type.
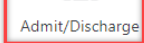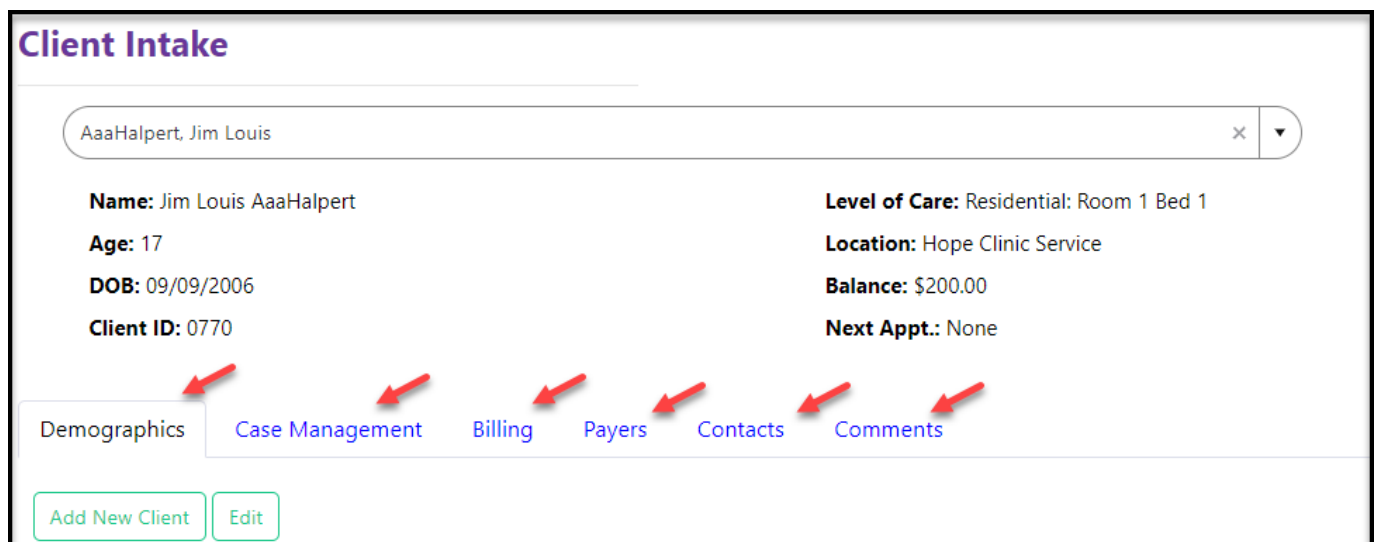
Client Profile Header – This client profile header provides the user with a quick look at the Level of Care, Location of Service, balance, and next appointment. From Client Intake, the user has additional functions to Admit the client, schedule an appointment, send forms through the Client Portal, Edit the profile picture, setup notification for the client and reset the clients portal password.

Episodes of Care module – You will find the new Episode of Care under the [Admit/Discharge] Icon from the Main Menu.. You will be able to create Episodes, add one or more Levels of Care, Transfer between levels of care, discharge and close the episode. You can also document Units, Rooms, and Beds.

Medication Module – Med Mgmt

This module is used to record your client's medications from the NIH list and add instructions. Users can also document allergies as well as track Client Vital Signs.

Client Medation

Select client ▼

Name: Dennis Aardvark
Age: 24
DOB: 06/04/2000
Client ID: 0881

Level of Care: Early Education
Location: Cook County Hospital
Balance: $91.00
Next Appt.: None

👤+ Admit   📅 Schedule   ✈ Send Forms   ••• More ▾

Medications

⊕ Add Medication

Medication	Sequence	Dose	Form	Frequency	Start Date	End Date	Active	Edit
ibuprofen 400 MG Oral Tablet [Ibu]	1	1	Oral Tablet	As directed	2024-07-24	2024-08-16	Yes	✎
ibuprofen 600 MG Oral Tablet [Ibu]	1	1	Oral Tablet	As directed	2024-07-24		Yes	✎
ibuprofen 800 MG Oral Tablet [Ibu]	1	1	Oral Tablet	Every four to six hours	2024-07-23		Yes	✎

Allergies

⊕ Add Allergy

Allergy Type	Allergy	Reaction	Severity	Edit
Other Allergy	peanuts	breaks out in rash	Low	✎

Client Vital Signs

⊕ Add Vital Signs

Initial Date	End Date	
mm/dd/yyyy 📅	mm/dd/yyyy 📅	🔄 Filter on Date

	Recorded				Heart Rate	Respiratory		Blood					
Date	**Time**	**Temperature**	**Unit**		**bpm**	**Rate**		**Pressure**	**Position**	**Sugar Level**	**Height**	**Weight**	**Edit**
2024-08-08	19:38:00	98.6	Fahr		60	-		120/70	Sitting	-	59 In	165 Lbs	✎
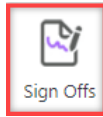
Progress Notes Sign Off -

This module provides a central location where the sender and receivers are given a list of requested signoffs, for example, to a supervisor or other user. Users can send progress notes, to a supervisor or other staff, for review and request for their sign off. The Signer can select multiple notes and sign off in batches for more efficiency. Future releases will include review and sign off on forms.

Batch Sign Selected Items

My Signoffs

	Author Name	Document	Document Date	Client Name	Client ID	Pending Signatures	Your Role	Comments	
☐	Jones, Sandy	Progress Note: General	07/30/2024	Jones, Sandy	0238	• Ron Alai, LCSW, CS Level II	Other	💬0	⊗
☐	Jones, Sandy	Missed Appointment Notes	07/23/2024	Aabucus , Sam	1077	• James Kirk • Ron Alai, LCSW, CS Level II	Other	💬0	⊗
☐	Jones, Sandy	Progress Note: General	07/18/2024	Jones, Sandy	0238	• Ron Alai, LCSW, CS Level II	Other	💬1	⊗
☐	Jones, Sandy	Progress Note: General	07/15/2024	Jones, Sandy	0238	• Ron Alai, LCSW, CS Level II	Other	💬0	⊗
☐	Jones, Sandy	Progress Note: Detailed	06/27/2024	Aabucus , Sam	1077	• Ron Alai, LCSW, CS Level II	Other	💬0	⊗

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Other Pending Signoffs

	Author Name	Document	Document Date	Client Name	Client ID	Pending Signatures	Send To	Your Role	Comments
☐	Alai, LCSW, CS Level II, Ron	Adolescent and Young Adult Health Questionnaire (11-20 Years)	07/29/2024	Aardvark, Dennis	0881	• Sandy Jones	↪	Author	💬0

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Additional Reports –

a. Summary of Services
b. Client Demographics Export
c. Attendance Status
d. Demographics Charts/Grafts

Cumulative Summary of Services

All Agencies

Date Printed: 8/8/2024

1/1/2024 to 12/31/2024

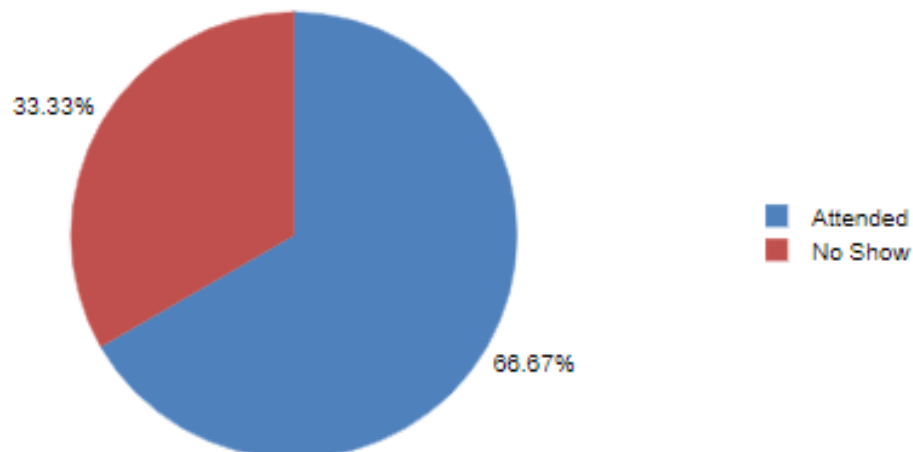| Session Type	Duration (Hours)
	78:55
24-Hour Crisis Line Response Call	1:00
After Care Support	3:45
Anger Management	24:15
Art Therapy	23:00
Budget Meeting	16:18
Crisis Outpatient Psychotherapy	19:20
Daily Notes: Residential	8:30
Family Session with client present	6:00
Family Session without client present	7:45
Group Session	50:59
In-house Video Conference	5:45
Individual Session	29:30
Intake Evaluation	4:00
Shift Note	0:30
Spiritual Guidance	9:00
Tele-health	3:00
Total:	291:32

Attendance Summary
Status

Report Date: 8/8/2024

Clinician	Co-Facilitator	Service Type	Client	Attribute	Date Start	Date End
Jones, Sandy		Anger Management	Able, Jane; Able, Janet ; Albert, Jack; Beta, Alan		01/01/2024	12/31/2024

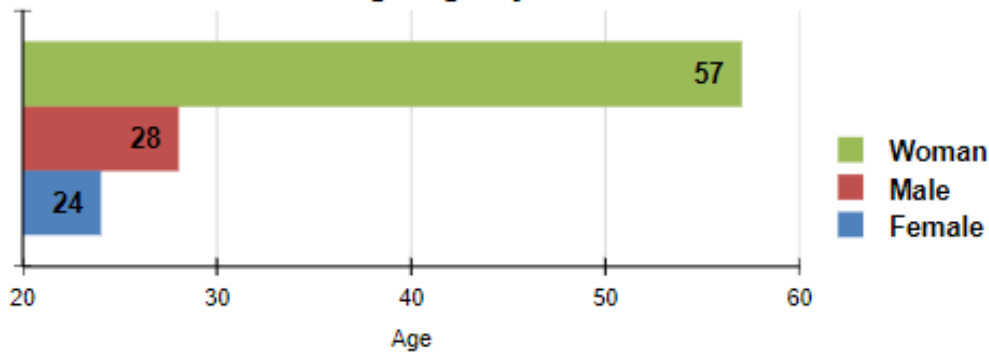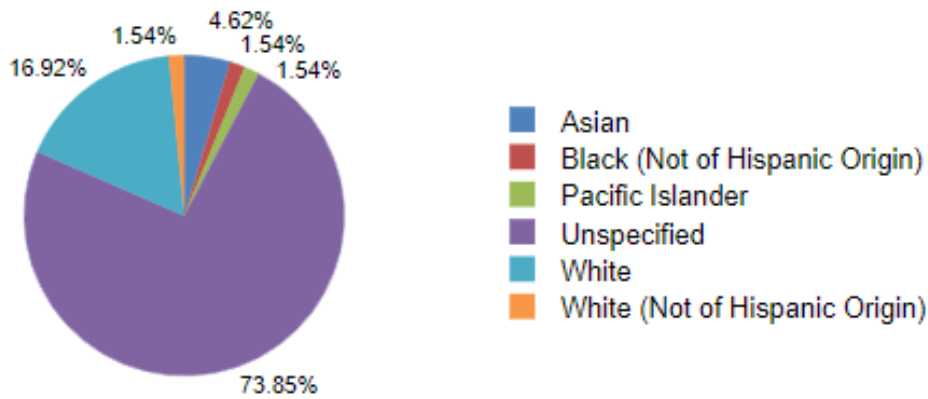| Service Type	Attended	Canceled	Confirmed	Left Message	No Show	Office Canceled	Rescheduled
24-Hour Crisis Line Response Call	0	0	0	0	0	0	0
After Care Support	0	0	0	0	0	0	0
Anger Management	2	0	0	0	1	0	0
Art Therapy	0	0	0	0	0	0	0
	0	0		0		0	
...onferen...							
Individual Session			0		0		0
Intake Evaluation	0	0	0	0	0	0	0
None	0	0	0	0	0	0	0
Shift Note	0	0	0	0	0	0	0
Spiritual Guidance	0	0	0	0	0	0	0
Tele-health	0	0	0	0	0	0	0
Total	**2**	**0**	**0**	**0**	**1**	**0**	**0**

33.33%

66.67%

- Attended
- No Show

User Demographic Summary

Average Age by Gender

57	Woman
28	Male
24	Female

Age: 20, 30, 40, 50, 60

Count of Race

- Asian — 4.62%
- Black (Not of Hispanic Origin) — 1.54%
- Pacific Islander — 1.54%
- Unspecified — 73.85%
- White — 16.92%
- White (Not of Hispanic Origin) — 1.54%

Ethnicity

- African-American — 1.54%
- Cherokee — 1.54%
- English — 12.31%
- Irish — 4.62%
- Unspecified — 76.92%
- Vietnamese — 3.08%