



Release Notes: OakTree Practice Management v3.3

Enhancements and Bug Fixes - Summary

In this recent update, there were various enhancements, reports and bug fixes, including:

- Additional Demographic fields
- Added User Security: Grant and Deny of User Roles
- Additional Reports and Exports: Current Admissions, Admissions and Discharges Custom Forms, Referrals, Client Appointments
- Additional Screening and Eval Tools (currently over 80 +)
- Chart Workflow Search bar
- Various system optimization and bug fixes

Additional Demographic Fields

Additional fields were added to Client Intake>Demographics to capture more information on family and dependents, legal status and other fields common with national outcome measures. These fields will be marked as “hidden” by default, for existing customers. To begin collecting data on these new fields, go to Settings > Clinical Demographics and select “Yes” to enable them.

Interpreter:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Proficient in English:	<input checked="" type="radio"/> Yes <input type="radio"/> No
County	<input checked="" type="radio"/> Yes <input type="radio"/> No
Township	<input checked="" type="radio"/> Yes <input type="radio"/> No
Driver's License #	<input checked="" type="radio"/> Yes <input type="radio"/> No
State Issued	<input checked="" type="radio"/> Yes <input type="radio"/> No
Client Cont'd	
	<input type="radio"/> Yes <input type="radio"/> No Section
Number of Dependents:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Number of children where client is Primary Care Giver:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Number of children age 25 and under:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Number of children living with someone else due to child protection court order:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Number of children for whom patient/client lost parental rights:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Living Arrangement:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Living Status:	<input checked="" type="radio"/> Yes <input type="radio"/> No
MH Residential Agreement:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Health Insurance:	<input checked="" type="radio"/> Yes <input type="radio"/> No
MCO Provider:	<input checked="" type="radio"/> Yes <input type="radio"/> No
MCO Effective Date:	<input checked="" type="radio"/> Yes <input type="radio"/> No
NILF (Not in Labor Force):	<input checked="" type="radio"/> Yes <input type="radio"/> No
Last Grade Completed	<input checked="" type="radio"/> Yes <input type="radio"/> No
School/Job Training Enrollment:	<input checked="" type="radio"/> Yes <input type="radio"/> No
SSI_SSDI Eligibility:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Family Income:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Source of Income/Support	<input checked="" type="radio"/> Yes <input type="radio"/> No

Additional Settings for User Roles

You will find more options for User Roles under Settings > Roles. More specific access can be granted (or denied) for each user “Role” that you setup. Default settings will give full access to all users based on their existing client permission settings. Additional security options are slated for future release.

Patient data access level

Own patients

- Billing
- Calendar
 - Add Event
 - Delete Event
 - Edit Event
- Case Management
 - Add Team Members
 - Edit Team Members
 - Remove Team Member
- Client Intake
 - Billing
 - Comments
 - Contacts
 - Demographics
 - Payers
- Client Scoring
 - Edit Records
- Client Summary
 - Delete Records
 - Edit Records

Diagnosis

- Add Records
- Delete Records
- Edit Records

Medications

- Add Records
- Edit Records

Progress Notes

- Add Records
- Edit Records

Send Forms

- Reset Client Password

Setup

- Professional Forms Setup

Cancel Delete Save

Additional Reports

- Current Admissions Report: Summary of current admissions by location of service
- Admissions and Discharges: Summary of admissions and discharges by location of service
- Referral Export: List of referral records from contacts
- Client Appointments Export: For viewing one or multiple appointments or for analytics
- Custom Forms Export: Select any custom form to export for analysis

Current Admissions

Report Date: 11/9/2024

Admissions by Location of Service

Location	Level of Care	Admissions	
ABC Treatment	Level 1 MH	0	
	Level 1.5 Outpatient Therapy	0	
	Level 1.7 Medically Managed Outpatient Treatment	0	
	Level 2 MH	0	
	Level 2.1 Intensive Outpatient Treatment	0	
	Level 2.5 High-Intensity Outpatient Treatment	0	
	Level 2.7 Medically Managed Intensive Outpatient Treatment	0	
	Level 3 MH	0	
	Level 3.1 Clinically Managed Low-Intensity Residential Treatment	0	
	Level 3.7 Medically Managed Residential Treatment	0	
	Level 4 Medically Managed Inpatient Treatment	0	
	Total Admissions		0
	Total # Unduplicated Clients Served		0

Census Report: Admissions and Discharges

Report Date: 11/9/2024

Admissions by Location of Service

Location	Level of Care	Admissions	
ABC Treatment	Level 1 MH	0	
	Level 1.5 Outpatient Therapy	0	
	Level 1.7 Medically Managed Outpatient Treatment	0	
	Level 2 MH	0	
	Level 2.1 Intensive Outpatient Treatment	0	
	Level 2.5 High-Intensity Outpatient Treatment	0	
	Level 2.7 Medically Managed Intensive Outpatient Treatment	0	
	Level 3 MH	0	
	Level 3.1 Clinically Managed Low-Intensity Residential Treatment	0	
	Level 3.7 Medically Managed Residential Treatment	0	
	Level 4 Medically Managed Inpatient Treatment	0	
	Total Admissions		0
	Total # Unduplicated Clients Served		0

Discharges by Location of Service

Location	Level of Care	Discharges	
ABC Treatment	Level 1 MH	1	
	Level 1.5 Outpatient Therapy	0	
	Level 1.7 Medically Managed Outpatient Treatment	0	
	Level 2 MH	0	
	Level 2.1 Intensive Outpatient Treatment	0	
	Level 2.5 High-Intensity Outpatient Treatment	0	
	Level 2.7 Medically Managed Intensive Outpatient Treatment	0	
	Level 3 MH	0	
	Level 3.1 Clinically Managed Low-Intensity Residential Treatment	0	
	Level 3.7 Medically Managed Residential Treatment	0	
	Level 4 Medically Managed Inpatient Treatment	0	
	Total Discharges		1
	Total # Unduplicated Clients Served		1

Agency Totals

Total Discharges	2
Total # Unduplicated Clients Served	1




Service Type	Meeting ID	Status	Description	Created By	Setting	Invited Users	FirstName	LastName	MeetingDate	MeetingTime	Duration
Individual Session	3	No Show	Remm, Beverly	Video Conference	Remm, Beverly	Jane Able	3/7/2024	10:30:00		30	
Individual Session	4	Attended	Scott, Kevin	Video Conference	Scott, Kevin	Doc Baker	3/8/2024	10:30:00		30	
Art Therapy	5	Attended	Remm, Beverly	In-Person	Remm, Beverly	Nellie Oleson	3/7/2024	13:30:00		30	
Individual Session	6	No Show	Scott, Kevin	Video Conference	Scott, Kevin	Laura Ingalls	3/14/2024	13:30:00		30	
Art Therapy	7	No Show	Remm, Beverly	In-Person	Remm, Beverly	Hannah Banana	3/14/2024	12:00:00		60	
Individual Session	8	Attended	Le, Paul	In-Person	Jones, Sandra	Jane Banana	3/11/2024	12:00:00		15	
Individual Session	9	Attended	Jones, Sandra	In-Person	Johnson, Magic	Tom Banana	3/12/2024	12:00:00		15	
Individual Session	10	No Show	Johnson, Magic	In-Person	Ramirez, Yubia	Jane Banana	3/13/2024	12:00:00		15	
Individual Session	11	No Show	Ramirez, Yubia	In-Person	Le, Paul	Tom Banana	3/14/2024	12:00:00		15	

Search Bar for Chart Workflow: Assigning Forms and Signatures

When assigning custom forms to your workflow tables, users will have the ability to filter for forms by typing into the search bar. For example, if a user is looking for their company specific form, they can begin typing the values that are specific to their form and it will appear on the grid. This reduces search time when looking for forms to assign to tabs, setup signatures

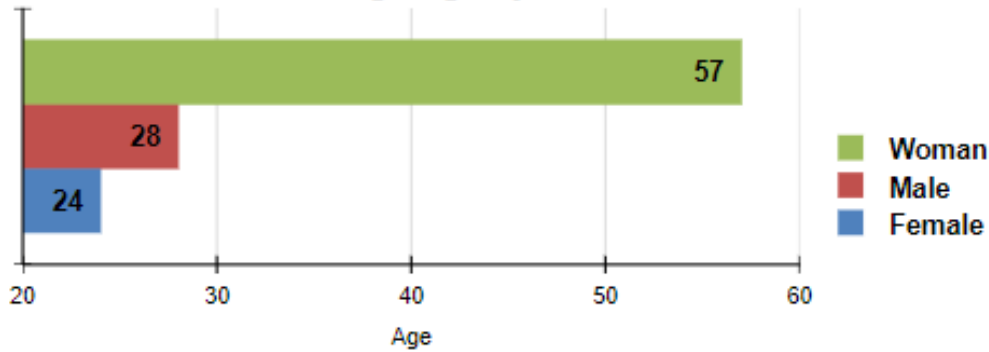
Assign Forms

Workflow for Chart **Clinical Workflow (Default)** for Job title **Clinician (Default)**
Tab **Basic Outpatient**

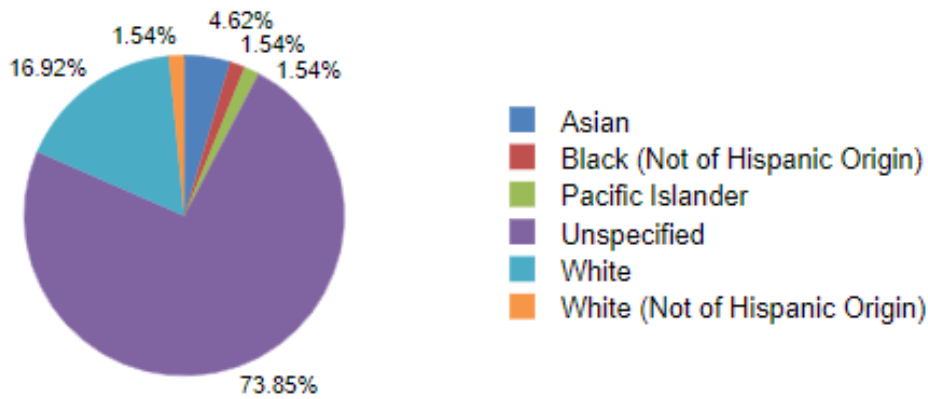
Selected	Form Name	Form Description	Signatures	Required
<input checked="" type="checkbox"/>	 <u>ASI</u>	Addiction Severity Index	<input type="button" value="Signatures"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="checkbox"/>	 <u>ASI LITE</u>	Addiction Severity Index Lite Version	<input type="button" value="Signatures"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="checkbox"/>	 <u>ASI NATIVE</u>	AI/AN Addiction Severity Index	<input type="button" value="Signatures"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No

User Demographic Summary

Average Age by Gender



Count of Race



Ethnicity

