

OakTree Professional Development User Guide:

How to Attach Forms to Credential Hours (Attestation/Work/Supervision)

- 1) Go to My Credentials, and Apply Hours. From the Apply Hours screen, fill out the information as needed (whether its required hours or not required hours)
- 2) Then Select the [Save and Upload/Manage Attachments] button

Apply Hours

-Please Select Additional (if applicable)- Add

A-PIT, Education, Attestation X

Activity Date(s) 11/22/2024 to 11/22/2024

Activity Type

Attestation Form ✓ Add Edit

Description

Cancel Save and Exit Save and Upload/Manage Attachments

NOTE: Attaching a form (ex. Attestation form) will vary based on how each agency has their credential type and categories are setup. Each Agency can setup their categories and activity types to their preference using the Add/Edit buttons where present or in the credential setup.

- 3) From the Manage Attachments screen, select the [Select Forms] button

Manage Attachments

A-PIT, Education, Attestation X

Activity Date(s): 11/22/2024 to 11/22/2024 Hours:

Description:

Attach Form(s): Upload Document(s):

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

Select Forms Choose Files No file chosen Upload

View Selected Remove Selected

Attached Form(s) No matching records found

View Selected Delete Selected

Uploaded Document(s) No matching records found

Edit Hour Entry Close

- 4) From the Attach Forms screen, select the form you want to attach to the transcript. Then select [Attach]

NOTE: You can only attach forms that have been filed as completed. You can preview the forms if their status is "Completed". (Forms are "completed" from the forms module via the [Forms] button in My Credentials)

Form Name	Attached To	Created By	Date Added	Status	Name
<input type="checkbox"/> Case Review	N/A	Paul Le	01/04/2024	In Progress	Le, Paul
<input checked="" type="checkbox"/> Peer Recovery Peer Supervisor - 250 Hours Providing	PS-PIT,Ethical Responsibility,Education; PRPS.Group Counseling,Education; PS-PIT,Advocacy,Advocacy	Paul Le	03/26/2024	Completed	Le, Paul
<input type="checkbox"/> Core Peer Recovery Specialist - 25 Peer Supervision Hours	N/A	Paul Le	04/29/2024	To Do	Le, Paul
<input checked="" type="checkbox"/> Core Peer Recovery Specialist - 25 Mentoring Education Hours	PS-PIT,Advocacy,Advocacy	Paul Le	04/29/2024	Completed	Le, Paul
<input type="checkbox"/> Work Experience Tracking Documentation	N/A	Paul Le	05/09/2024	In Progress	Le, Paul
<input type="checkbox"/> Core Peer Recovery Specialist - 25 Recovery Wellness Hours	N/A	Paul Le	11/22/2024	To Do	Le, Paul
<input type="checkbox"/> Advanced Peer Recovery Specialist - 25 Peer Supervision Hours	N/A	Paul Le	11/22/2024	To Do	Le, Paul

- 5) Once you attach the form, you'll be able to see it in the Attached Form(s) section. You can continue to upload documents, view any documents in the grids, go back and edit hours section, or just close and return to Credentials.

Activity Date(s): 11/22/2024 to 11/22/2024 Hours: []

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)

- Advanced Peer Recovery Specialist - 25 Peer Supervision Hours

Uploaded Document(s)

No matching records found

- 6) From the transcripts screen, you will see that the form was attached to the hour you just applied. To view, select the paperclip.

Transcripts

Active Archived

Assign Credential Forms Apply Hours

Supervisee	Activity Date	Credential Acronym	Hour Type	Category	Activity Type	Supervisor Reviewed	Hours Applied	Status
Paul Le	11/22/2024	PS-PIT	Advocacy	Advocacy	Conference Workshop	Paul Le	5	Approved
Paul Le	11/22/2024	A-PIT	Education	Attestation	Attestation Form	Paul Le	N/A	Approved

- 7) For Supervisors, you will be able to view those attached forms from Pending Approvals. The form will be either attached with another hour entry, or (depending on how your agency sets up credentials) labeled as its own hour entry.

NOTE: in the example below, both methods are used:

- where "Attestation" is its own Hour Category with 1 attachment of the attestation form
- Where the attestation form is attached to an Hour Category "Ethics"

My Approvals

James, Derwin > PIT > Advocacy > Education > 5.00 Hours > (Start: 11/02/2021 Expire: 05/02/2023) > Paul Le (Supervisor)		
1	4/21/2024	Pending Supervisor Review <input checked="" type="radio"/> Pending <input type="radio"/> Approve <input type="radio"/> Deny
Rivers, Phillip > PIT > Advocacy > Core Training > 5.00 Hours > (Start: 09/16/2021 Expire: 03/16/2023) > Paul Le (Supervisor)		
2	4/29/2024	Pending Supervisor Review <input checked="" type="radio"/> Pending <input type="radio"/> Approve <input type="radio"/> Deny
Rivers, Phillip > PIT > Work Experience > <u>Attestation</u> > Hours > (Start: 09/16/2021 Expire: 03/16/2023) > Paul Le (Supervisor)		
1	4/29/2024	Pending Supervisor Review <input checked="" type="radio"/> Pending <input type="radio"/> Approve <input type="radio"/> Deny
Rivers, Phillip > PIT > Advocacy > Ethics > 3.00 Hours > (Start: 09/16/2021 Expire: 03/16/2023) > Paul Le (Supervisor)		
2	4/11/2024	Pending Supervisor Review <input checked="" type="radio"/> Pending <input type="radio"/> Approve <input type="radio"/> Deny