

# AI Reporting: Printing an ASI Assessment Biopsychosocial Narrative

To print a report in OakTree you will need to run a selected form or forms against the AI Tool. This compiles your form inputs into a report. The report is then printed in the Report Viewer. The following steps will show you how to create the report.

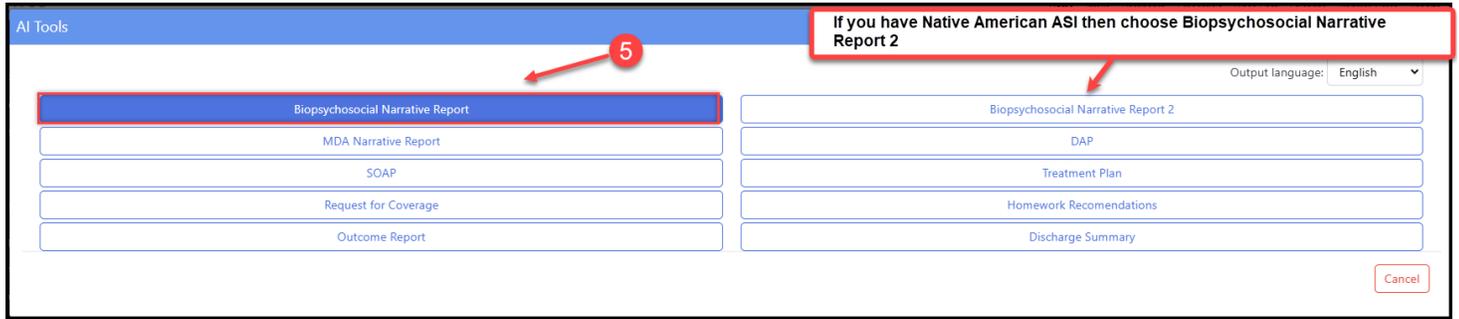
1. First select the client
2. Open the Client Summary
3. Check the box next to the patient assessment
4. Click the [AI Tool] button - (this will compile your inputs to create your report)

The screenshot displays the OakTree Practice Management interface. On the left is a dark purple sidebar menu with the following items: Home, My Caseload, Add Client, Client Intake, Sign Offs, My Workflow, Demographics, Client Communications, Intake Forms, Clinical Forms, Screenings, Client Chart, Send Forms, Case Management, Client Information, Client Scoring, and Client Summary. The main content area is titled 'Client Summary' and shows the client name 'Albert, George'. Below this, the following information is displayed: Name: George Albert, Age: 63, DOB: 12/10/1960, and Client ID: 0193. There are three buttons: 'Upload File', 'AI Tools', and 'Batch File as Complete'. Below the buttons is a table with the following rows:

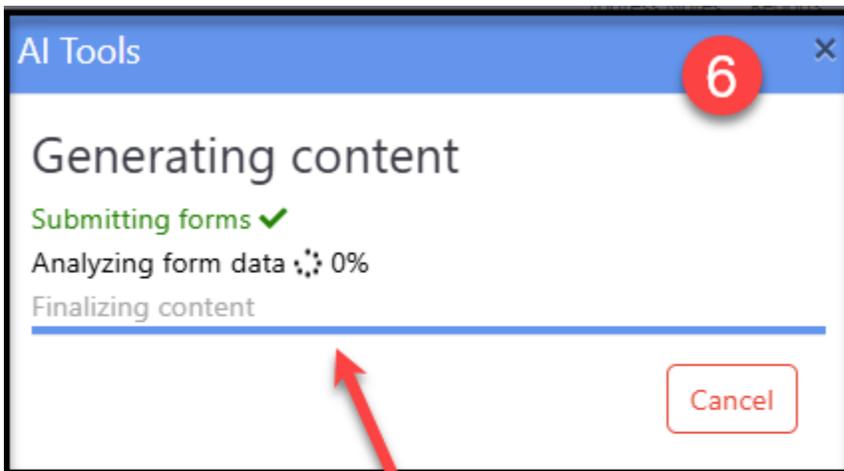
<input type="checkbox"/>	Description
<input type="checkbox"/>	ASAM Treatment Plan
<input checked="" type="checkbox"/>	Addiction Severity Index
<input type="checkbox"/>	BSAP
<input type="checkbox"/>	Consent For Data Management (OakTree)

At the bottom of the table, it says 'Showing 1 to 4 of 4 rows'. Red callout boxes with numbers 1 through 4 point to the client name, the 'Client Summary' menu item, the 'Addiction Severity Index' checkbox, and the 'AI Tools' button respectively.

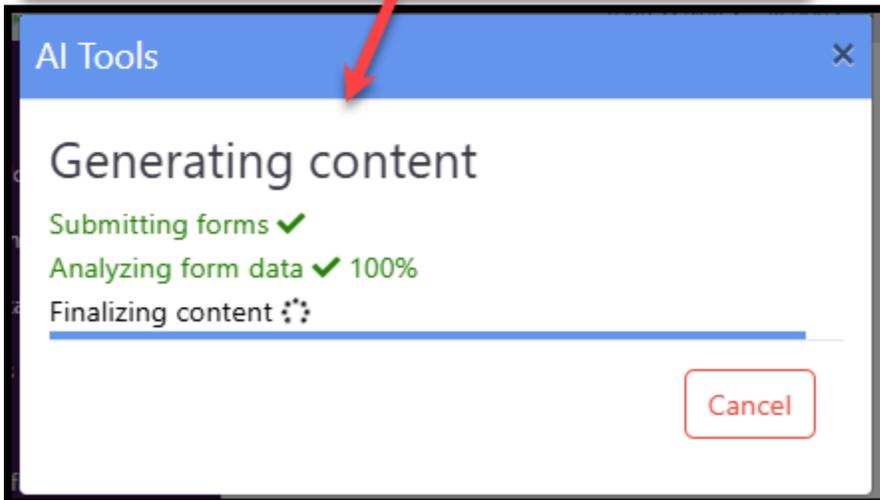
5. Choose the Biopsychosocial Narrative Report or other selection to create your report.



6. The AI Tool will generate the report



Wait for AI Tool to generate the report



7. At this point you will be able to review the report on screen. You are given three options.
  - a. **[Cancel]** button to go back to update the assessment
  - b. **[Copy]** button to copy it to a Word document for additional editing
  - c. **[Save]** button to create the report and send it to Report Viewer
  
8. Click the **[Save]** button and then the **[Ok]** button to save the report to the form. When done click the **[Cancel]** button to exit the screen.

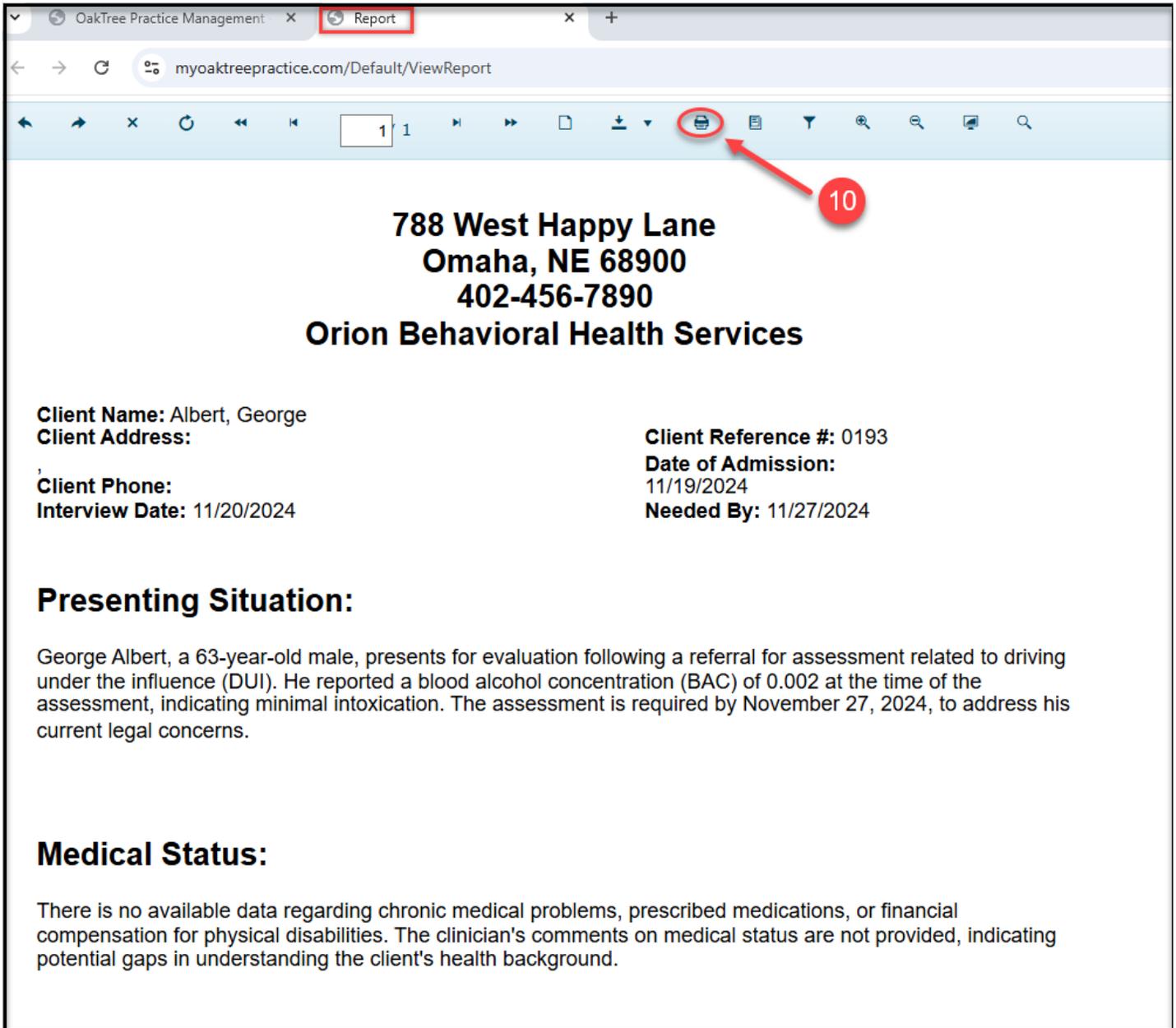
The screenshot shows the 'AI Tools' interface. A confirmation dialog box is open, asking 'Are you sure you want to continue?' with 'Cancel' and 'OK' buttons. A red circle '7' is on the 'Presenting Situation' text area. A red circle '8' points to the 'OK' button. At the bottom right, three buttons are labeled 'a', 'b', and 'c': 'Cancel', 'Copy', and 'Save'.

9. You will see a paper icon for the assessment. Click on it to open the Report Viewer

The screenshot shows the 'Client Summary' page for George Albert. It includes fields for Name, Age, DOB, Client ID, Level of Care, Location, Balance, and Next Appt. Below are buttons for 'Upload File', 'AI Tools', and 'Batch File as Complete'. A list of assessments is shown, with 'Addiction Severity Index' selected and highlighted in red. To the right is a table with columns: Date Due, Status, Portal, and Actions. The 'Addiction Severity Index' row is highlighted in red, and a red circle '9' points to a paper icon in the 'Actions' column.

Description	Created By	Date Due	Status	Portal	Actions
<input type="checkbox"/> ASAM Treatment Plan	Phil Baker		In Progress		✖
<input checked="" type="checkbox"/> Addiction Severity Index	Phil Baker		In Progress		✖ 📄
<input type="checkbox"/> BSAP	Phil Baker		In Progress		✖
<input type="checkbox"/> Consent For Data Management (OakTree)	Phil Baker		In Progress		✖

10. Click the Printer Icon to print your assessment



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402-456-7890  
**Orion Behavioral Health Services**

**Client Name:** Albert, George  
**Client Address:**  
**Client Phone:**  
**Interview Date:** 11/20/2024

**Client Reference #:** 0193  
**Date of Admission:**  
11/19/2024  
**Needed By:** 11/27/2024

**Presenting Situation:**

George Albert, a 63-year-old male, presents for evaluation following a referral for assessment related to driving under the influence (DUI). He reported a blood alcohol concentration (BAC) of 0.002 at the time of the assessment, indicating minimal intoxication. The assessment is required by November 27, 2024, to address his current legal concerns.

**Medical Status:**

There is no available data regarding chronic medical problems, prescribed medications, or financial compensation for physical disabilities. The clinician's comments on medical status are not provided, indicating potential gaps in understanding the client's health background.

For additional questions, contact AccuCare Support at 800-324-7966 or email [support@orionhealthcare.com](mailto:support@orionhealthcare.com) and we will be happy to assist you!