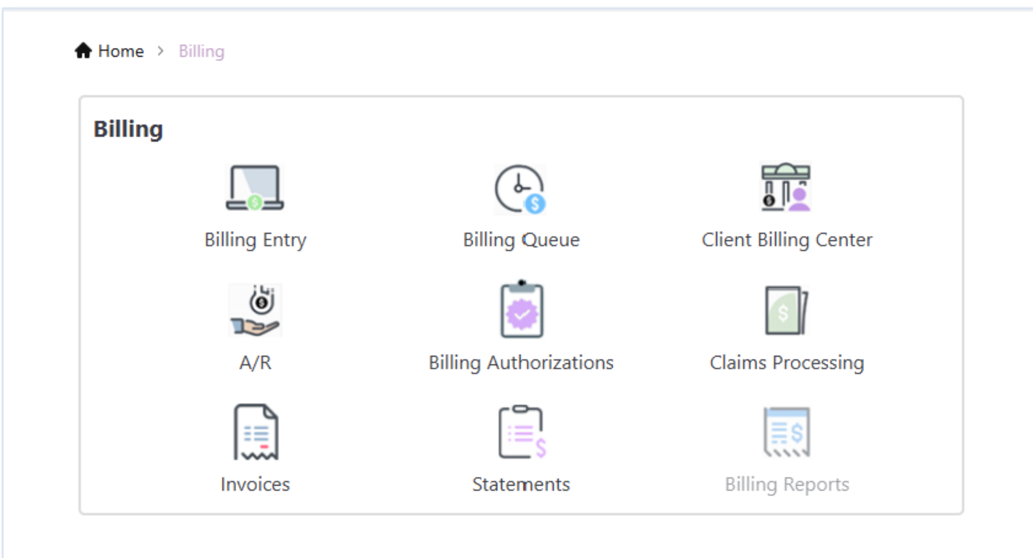
Release Notes: OakTree Practice Management v3.4

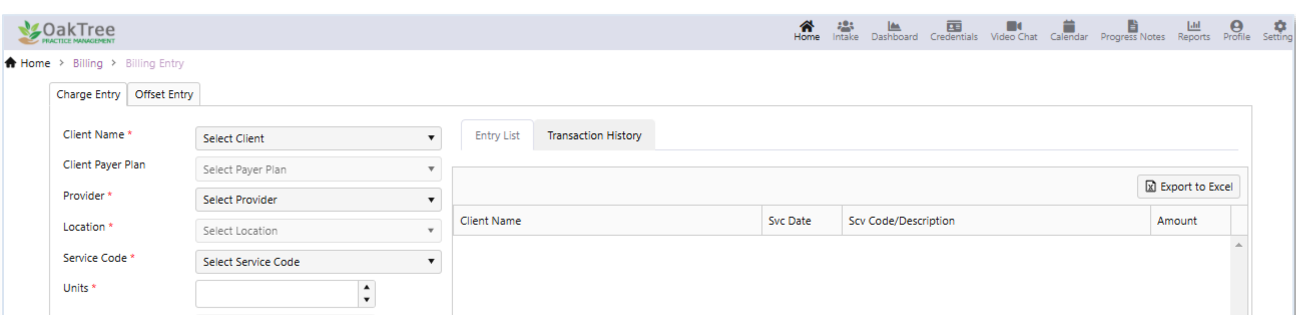
Enhancements and Bug Fixes - Summary

Billing Update

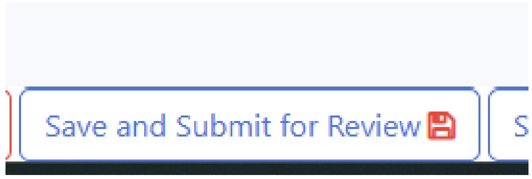
Additional functionality was added or updated to the Billing feature. Please call to arrange a walkthrough to assist in activating the billing module for setup. Which includes:

- Billing Client Center
- Client Authorizations
- Invoices
- Client Statements
- Billing Queue (Transfer from progress notes, forms and calendar
- A/R
- Claims Processing
- Billing Entry

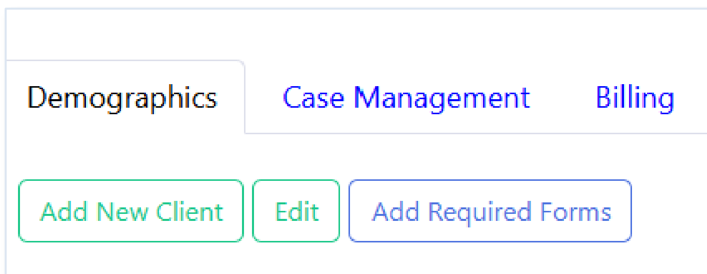




Simplified Sign Off in Progress Notes
A "Save and Submit for Review" button has been add which will save your note and present the signers checklist for your submission. New notification messages replaced the save message that displayed "OK" buttons which appeared to prompt the user to click OK to acknowledge the save.



Updated functionality of "Required Forms"
The required forms process was not handling the automatic creation of forms in the desired behavior. Thus, an "Add Required Forms" button has been added in Client Intake and My Caseload. Selecting the "Add Required Forms" button will add all required forms that were setup in Workflow setup. The user that selects "Add Required Forms" will be listed as the "Created By" in the forms menu. This will resolve the duplicate forms and provide the ability to select user that will be associated to the form that was created.

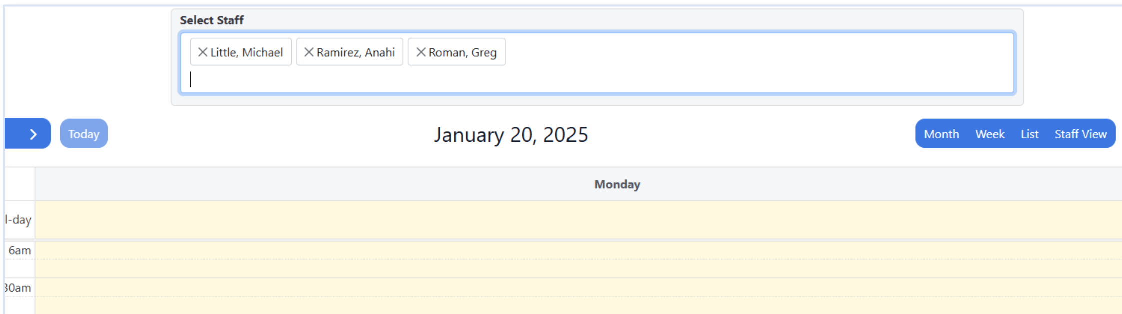


Client Appointment Export
Additional columns have been added to the client appointment export report. Those include:

- Client ID
- Client Date of Birth
- Progress Notes Status
- Insured ID Number
- Service Complete Date
- Diagnosis

Calendar Bug Fixes

- Updated calendar sync function
- User should only see the appointment they are included in “Staff”. Other appointments will appear when selecting “Staff View”
- Updated editing a recurring appointment
- Added duration for “120” and “240” minutes



Other General Bug Fixes

- Updated user profile settings to match setup
- Updated refresh functionality
- Updated functionality related to generating Client ID
- Change Logs: Updated reporting on change logs including adding UTC time
- Updated functionality in “Send Forms” for parent/guardian sharing
- Updated functionality to reduce entering duplicate clients
- Updated User Roles in limit a role to one per user
- Updated client search in Medication Management
- Updated Unread Comments to restrict user views in other threads
- Added a "Sent To” in unread comments for any forms sent to Sign Off
- Updated Payer Plan display of client’s date of birth
- Update to setup up signature to require user to enter printed name
- Updated client intake and adding new client
- Updated functionality to Quick Add in “My Caseload” for improved performance
- Update in My Caseload for displaying primary case manager
- Improved functionality to send forms from client intake
- Improved functionality for required fields
- Improved functionality of client demographic export

Added Automatic Scoring and Summary for the Screening Tools (forms)

- Beck Depression Scale
- Eat 26
- Altman Self Mania
- CUPIT