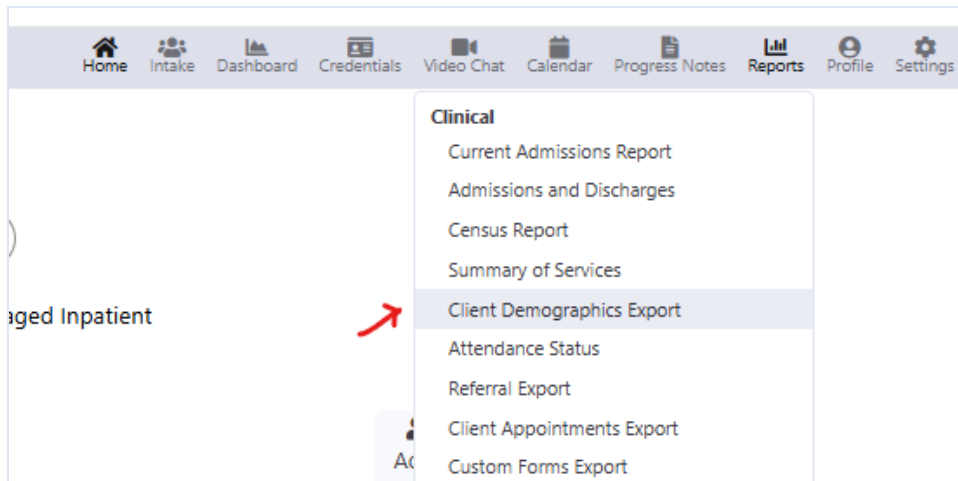


## Release Notes: OakTree Practice Management v3.5 (02/09/25)

### Enhancements and Bug Fixes - Summary

In this release, there were general updates, maintenance and fixes or improvements for the following:

- Added more merge fields (Client Preferred Pronouns, Client Age and Current Date) that can be used in clinical forms.
- Improvements to Client Demographic Export to include newly added fields from v3.3 release



- General fixes to Billing Queue time displays
- Added open text field to Client Demographics for “Legal Status Description”

County of Arrest <input type="text"/>	Date of Arrest <input type="text" value="mm/dd/yyyy"/>
Court Docket # <input type="text"/>	Legal Status Description <input type="text"/>

- Added values to Client Demographic drop down lists for Living Arrangements (Homeless, Jails and Residence options) and Marital Status (Cohabiting)
- Updates to AI reporting tool for ASI narrative
- Bug fixes for the recurring calendar appointments feature
- Improvements to user alert messages and instruction when selecting buttons or links that are not valid or have restrictions.
- Updating scoring displays for screening tools that have scoring

- Updated the Submit for Review feature to automatically include the user's supervisor checked (and the user's name disabled since they are sending the request)

- Update Progress Notes to display “End Time” and an option to “Not Require” entering time (for residential or inpatient agencies that only document the session activity).
  - End Time is auto calculated if Duration or Start Time is modified.
  - Duration is also auto calculated if Start Time or End Time is modified.

- Updated Progress Notes main grid to display File Status and Signed By status separately

Session Date	Clinician	Intervention	Service Type	File Status	Signed By
02/09/2025	Le, Paul	Assessed level of insight on ADHD	Spiritual Guidance	Completed	Paul Le
12/23/2024	Le, Paul	Assessed severity of anger to determine appropriate level of care	Individual Session	In Progress	Paul Le
11/04/2024	Le, Paul	Assessed level of insight related to anger	Group Session	In Progress	Not Signed
10/07/2024	Le, Paul	Discussed cross-addiction and implications on recovery.	None	To Do	Paul Le
08/27/2024	Jones, Sandra	Assessed triggering events that contributes to consequences related to ADHD behaviors	Group Session	In Progress	Not Signed