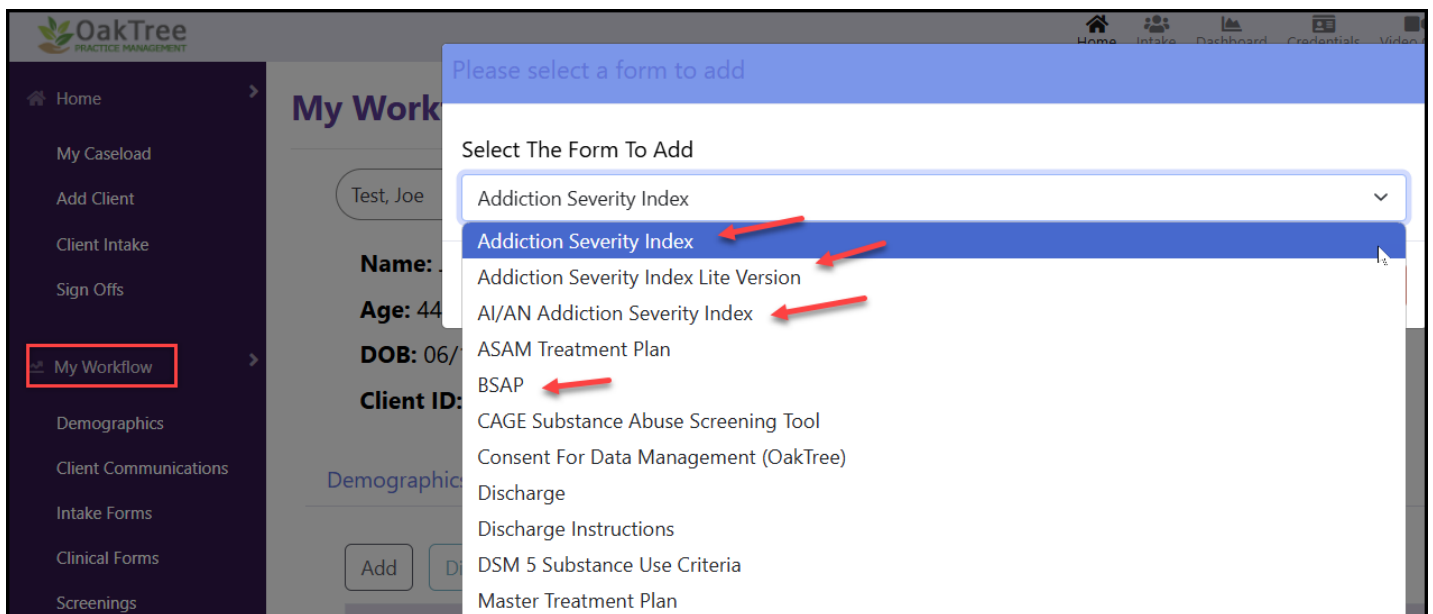


# Creating and Printing an ASI Assessment

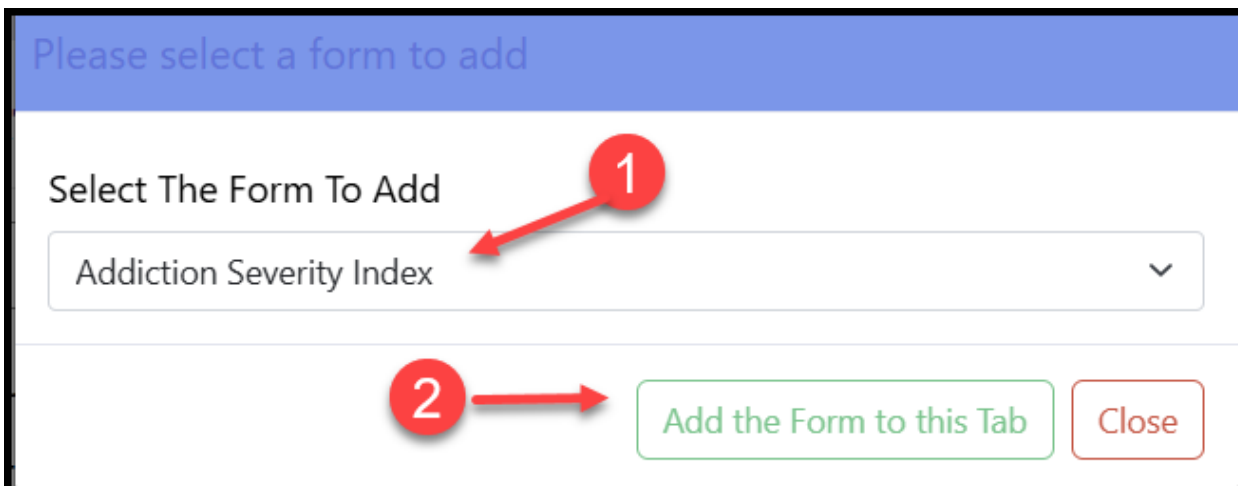
Various assessment forms covering areas of life, including General, Medical, Drug/Alcohol, and more, are available in Oaktree. Based on your input, you can use these forms to comprehensively assess your client's life experiences. This will aid in evaluating and planning the client's recovery.

## Select an Assessment Form

To start, select a client-applicable assessment. Under workflow, go to the tab where the assessments have been assigned to choose an Assessment questionnaire.



- 1) Select your Assessment
- 2) Click the [Add the Form to this Tab] button to open the assessment.



## Start Assessment

The assessment is divided into pages by life areas, with comments that can be entered into the interviewer's assessment, diagnostic impression, recommendation, and narrative summary.

The screenshot shows the 'Addiction Severity Index' form. At the top, there are two rows of tabs. The first row, labeled 'Life Areas' with a red box and arrow, contains 'General', 'Medical', 'Employment', 'Drug/Alcohol', 'Legal', 'Family History', 'Family/Social', and 'Psychiatric'. The second row, labeled 'Interviewer's Assessment' with a green box and arrow, contains 'Interviewer's Assessment', 'Diagnostic Impressions', 'Recommendation', and 'Narrative Summary'. Below the tabs, the form fields are listed:

Field ID	Field Name	Value
G1.	Client Reference Number:	
G2.	Social Security Number	232-22-2222
G3.	Agency Number	
G4.	Date of Admission	mm/dd/yyyy
G5.	Date of Interview	mm/dd/yyyy
G6.	Time begun:	--:-- --

## Points to Remember

- 1) Under this workflow, start with the General Tab, filling out all applicable fields.
- 2) Provided at the bottom of each life area, you will find a place to enter comments.

The screenshot shows the 'Addiction Severity Index' form with the 'General' tab selected. The form fields are filled with example data:

Field ID	Field Name	Value
G1.	Client Reference Number:	CRN123
G2.	Social Security Number	232-22-2222
G3.	Agency Number	AN456
G4.	Date of Admission	01/27/2025
G5.	Date of Interview	01/30/2025
G6.	Time begun:	04:00 PM
G51.	Who referred you for an evaluation?	<input checked="" type="radio"/> Self <input type="radio"/> Attorney <input type="radio"/> Probation/Parole Officer <input type="radio"/> Presentence Investigator <input type="radio"/> Judge/Court <input type="radio"/> Other
G52.	The referral source's name:	Jack Asher
	Address:	45th Street
	City, State, Zip:	Omaha, NE. 68130
	Phone Number:	(402) 555-1234
G53.	By when do you need this assessment?	01/31/2025
G54.	Why are you receiving this assessment?	<input checked="" type="radio"/> OWI/DUI <input type="radio"/> Court Ordered <input type="radio"/> Attorney Recommended <input type="radio"/> Other Criminal Arrest <input type="radio"/> Self Interest <input type="radio"/> Other

A red box with the text 'Enter in your inputs' and a red arrow points to the 'Who referred you for an evaluation?' field.

Other

Specify other Controlled Environment

G20. How many days:

G21. Comments:

**Type in comments**

H<sub>1</sub> H<sub>2</sub> B I U

## Buttons

- 1) **Save and Submit for Review:** When this button is clicked, the Submit for Review dialog box opens, where the assessor can request a review and signature from other assigned case management team member(s).
- 2) **Save All and Close:** Your inputs are saved, and the assessment is closed. It can be reopened if a modification is needed.
- 3) **Save Progress:** This button saves the users' progress and allows them to keep working on the assessment.
- 4) The File Completed Form locks the form, preventing new inputs. It can be opened in read-only mode.

**1**

**2**

**3**

**4**

## Capture Signatures

If the Super Admin added Signature blocks to the form, they will be found below the questions. If signature blocks are present, use your mouse to capture the signatures.

G21.

Comments:

H<sub>1</sub> H<sub>2</sub> B I U

Comments are typed here

A handwritten signature in black ink on a light gray background. The signature reads "Joe Test" in a cursive, slightly stylized font.

**Signature of Client: Joe Test** *(Required)*

**Printed Name:** Joe Test

Date Signed: 01/30/2025

A handwritten signature in black ink on a light gray background. The signature reads "Ron Admin" in a cursive, slightly stylized font.

**Signature of Primary Case Manager: (Optional)**

**Printed Name:** Ron Admin LCW II

Date Signed: 01/30/2025

## How to use AI Tools Icon

After finishing the Assessment, generate a narrative report using the AI Tool in the Client Summary.

- 1) Verify you have the right Client and select Client Summary
- 2) Check box next the form(s) you wish to run the AI Tools against
- 3) Click the [AI Tools] button

The screenshot shows the 'Client Summary' section in the left sidebar, highlighted with a red circle and the number 1. The main area contains buttons for 'Add Required Forms', 'Upload File', 'AI Tools' (highlighted with a red circle and the number 3), and 'Batch File as Complete'. Below these buttons is a table with columns 'Description', 'Created By', and 'Date Created'. The 'Addiction Severity Index' form is selected with a checkbox, highlighted with a red circle and the number 2.

<input type="checkbox"/>	Description	Created By	Date Created
<input type="checkbox"/>	Progress Note: General	Ron Admin	02/14/2025
<input type="checkbox"/>	Progress Note: Detailed	Ron Admin	02/01/2025
<input type="checkbox"/>	Treatment Plan	Ron Admin	01/31/2025
<input checked="" type="checkbox"/>	Addiction Severity Index	Ron Admin	01/30/2025

The 'AI Tools' dialog box is shown with a title bar and a close button. A red box with the text 'Select the language and report you wish to create' has arrows pointing to the 'Output language' dropdown and the report selection area. The 'Output language' dropdown is set to 'English'. The report selection area contains two columns of buttons: 'Biopsychosocial Narrative Report', 'MDA Narrative Report', 'SOAP', 'Request for Coverage', 'Outcome Report' on the left, and 'Biopsychosocial Narrative Report 2', 'DAP', 'Treatment Plan', 'Homework Recommendations', 'Discharge Summary' on the right. A 'Cancel' button is at the bottom right.

The 'AI Tools' dialog box shows the progress of report generation. The title bar is 'AI Tools'. The main text is 'Generating content'. Below it, there are three status indicators: 'Submitting forms' with a green checkmark, 'Analyzing form data' with a progress bar at 0%, and 'Finalizing content' with a progress bar. A red box with the text 'Wait for the report to be generated' is overlaid on the progress bars. A 'Cancel' button is at the bottom right.

## Report View Functions

- 1) You are provided editing options in view mode.
- 2) A ←Back button is available to select another report option
- 3) The [Copy] button provides a way to paste the report into a Word document or the narrative report.
- 4) The [Save] button will automatically paste the report into the Narrative Summary of the form.

The screenshot shows a web application window titled "AI Tools" with a blue header bar. The main content area displays a report for a client named Joe Test. The report is organized into sections: "Presenting Situation:", "Medical Status:", "Employment/Support Status:", and "Drug/Alcohol Use:". Each section contains a paragraph of text. At the bottom of the report, there is a "Save to:" dropdown menu currently set to "Addiction Severity Index". Below the dropdown are three buttons: "Cancel", "Copy", and "Save".

Numbered callouts in the image:

- 1**: Points to the text formatting toolbar at the top left, which includes options for heading (H1, H2), bold (B), italic (I), underline (U), and a red circle icon.
- 2**: Points to the "← Back" button located at the bottom left of the report content area.
- 3**: Points to the "Copy" button at the bottom right of the interface.
- 4**: Points to the "Save" button at the bottom right of the interface.

## AI Tools – Example of Save Function to the Form

### Addiction Severity Index

General
Medical
Employment
Drug/Alcohol
Legal
Family History
Family/Social
Psychiatric
Interviewer's Assessment

Diagnostic Impressions
Recommendation
Narrative Summary

**Narrative Summary**

H<sub>1</sub> H<sub>2</sub>    **B**    *I*    U

**Presenting Situation:**

The client, Joe Test, was referred for assessment following a DUI incident. He was evaluated on January 30, 2025, with a blood alcohol concentration (BAC) of 0.003 at the time of the assessment. The referral source was Jack Asher, located at 45th Street, Omaha, NE, who indicated that Joe was self-referred for evaluation. The assessment was deemed critical to address concerns related to his substance use following the legal incident.








Comments are typed here.

**Medical Status:**

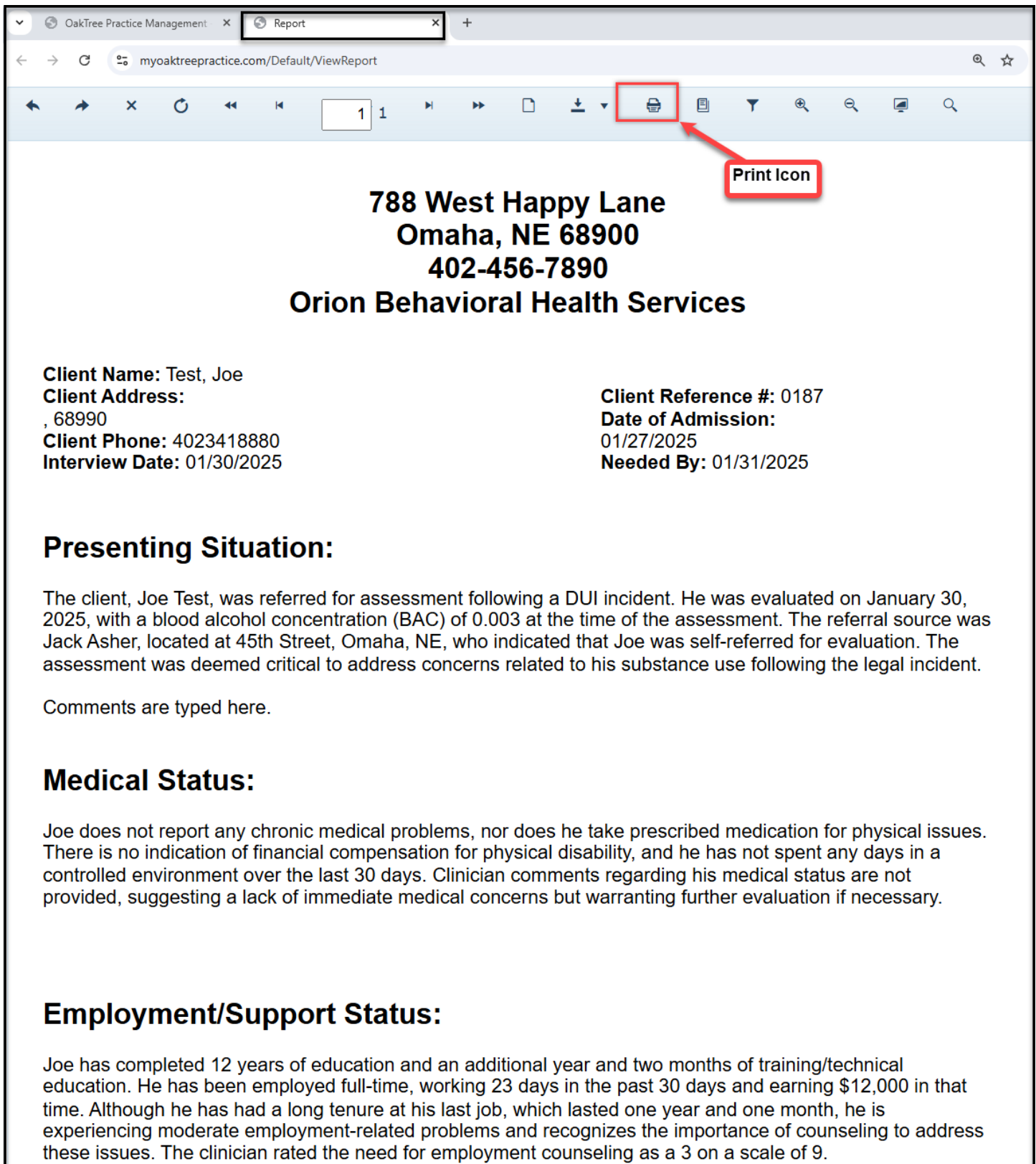
Joe does not report any chronic medical problems, nor does he take prescribed medication for physical issues. There is no indication of financial compensation for physical disability, and he has not spent any days in a controlled environment over the last 30 days. Clinician comments regarding his medical status are not provided, suggesting a lack of immediate medical concerns but warranting further

## Generating Printed Summary

You will notice a paper icon after generating a report with the AI Tool. This Icon opens the report viewer, which allows you to print the report.

<input type="checkbox"/>	Description	Created By	Date Created	Date Due	Status	Portal	Actions
<input type="checkbox"/>	Progress Note: General	Ron Admin	02/14/2025		In Progress		 
<input type="checkbox"/>	Progress Note: Detailed	Ron Admin	02/01/2025		In Progress		 
<input type="checkbox"/>	Treatment Plan	Ron Admin	01/31/2025		In Progress		
<input type="checkbox"/>	Addiction Severity Index	Ron Admin	01/30/2025		In Progress		 

## Report View and Print Option



The screenshot shows a web browser window with the address bar displaying "myoaktreeppractice.com/Default/ViewReport". The browser's toolbar includes a print icon, which is highlighted with a red box and a red arrow pointing to it from a label "Print Icon". The report content is centered and displays the following information:

**788 West Happy Lane  
Omaha, NE 68900  
402-456-7890  
Orion Behavioral Health Services**

**Client Name:** Test, Joe  
**Client Address:**  
, 68990  
**Client Phone:** 4023418880  
**Interview Date:** 01/30/2025

**Client Reference #:** 0187  
**Date of Admission:**  
01/27/2025  
**Needed By:** 01/31/2025

**Presenting Situation:**

The client, Joe Test, was referred for assessment following a DUI incident. He was evaluated on January 30, 2025, with a blood alcohol concentration (BAC) of 0.003 at the time of the assessment. The referral source was Jack Asher, located at 45th Street, Omaha, NE, who indicated that Joe was self-referred for evaluation. The assessment was deemed critical to address concerns related to his substance use following the legal incident.

Comments are typed here.

**Medical Status:**

Joe does not report any chronic medical problems, nor does he take prescribed medication for physical issues. There is no indication of financial compensation for physical disability, and he has not spent any days in a controlled environment over the last 30 days. Clinician comments regarding his medical status are not provided, suggesting a lack of immediate medical concerns but warranting further evaluation if necessary.

**Employment/Support Status:**

Joe has completed 12 years of education and an additional year and two months of training/technical education. He has been employed full-time, working 23 days in the past 30 days and earning \$12,000 in that time. Although he has had a long tenure at his last job, which lasted one year and one month, he is experiencing moderate employment-related problems and recognizes the importance of counseling to address these issues. The clinician rated the need for employment counseling as a 3 on a scale of 9.

**If you have additional questions, contact OakTree Support at 800-324-7966 or email [support@orionhealthcare.com](mailto:support@orionhealthcare.com). We will be happy to assist you!**