



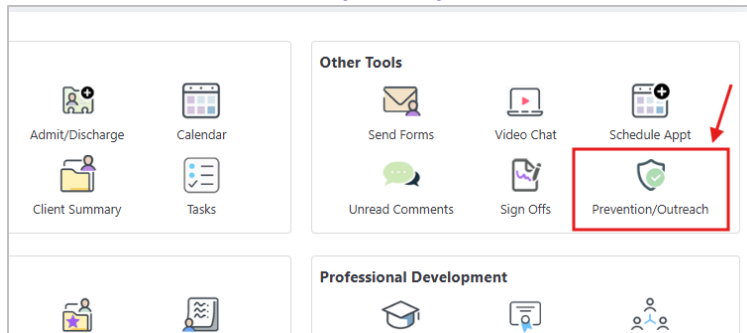
Release Notes: OakTree Practice Management v3.7 (04/06/25)

Enhancements and Bug Fixes - Summary

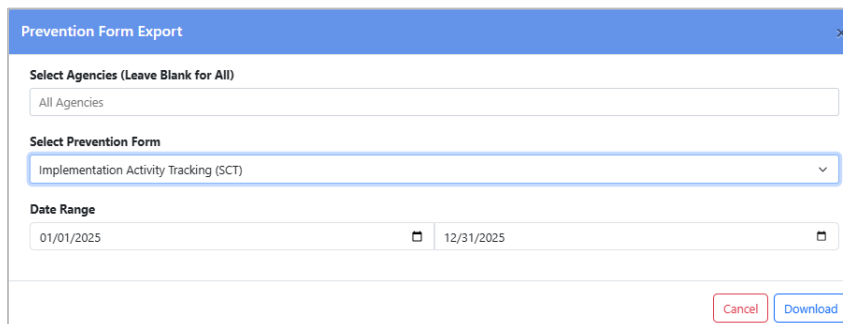
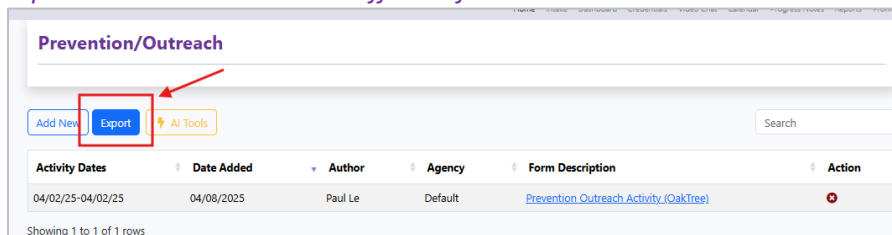
In this release, there were general updates, maintenance and fixes or improvements for the following:

- **NEW FEATURE ADDED: Prevention and Outreach Activity Tracking** including:
 - Prevention/Outreach Tracking form
 - Program Needs Assessment Form
 - Full data export to Excel with filters for Agency, Date Range and Form type
 - AI Tools for reporting with narrative summaries, language translator and more

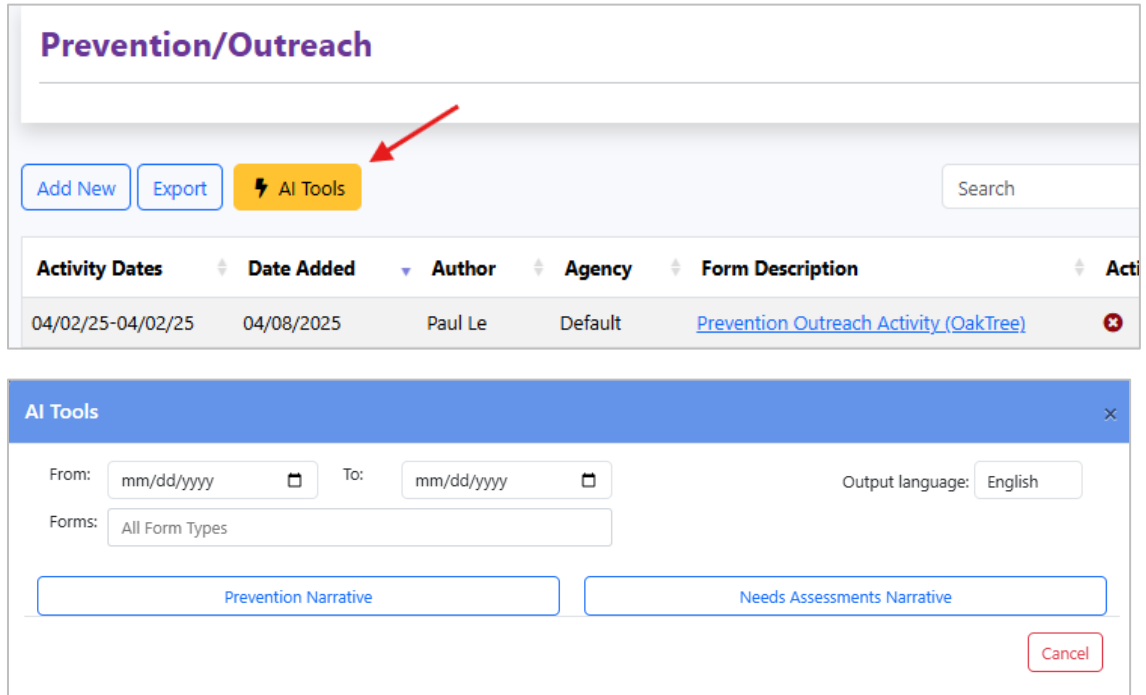
Access Prevention/Outreach feature from the MAIN MENU



Export data to Excel. Choose different filters to download.



AI Tools allows users to create narrative summary reports on the prevention/outreach or program needs assessment forms. Use filters to set parameters and change language output (if desired).



Prevention/Outreach

Buttons: Add New, Export, **AI Tools** (highlighted with a red arrow), Search

Activity Dates	Date Added	Author	Agency	Form Description	Acti
04/02/25-04/02/25	04/08/2025	Paul Le	Default	Prevention Outreach Activity (OakTree)	✖

AI Tools

From: mm/dd/yyyy To: mm/dd/yyyy Output language: English

Forms: All Form Types

Buttons: [Prevention Narrative](#), [Needs Assessments Narrative](#), Cancel

- Improved Print functionality to custom forms to open the form in PDF format with a print dialogue. Other improvements to how the forms are displayed for printing will continue into the next release
- Added Date of Birth to client search functions. Now users can search for clients via Name, Client ID or Date of Birth



Client Intake

Search bar: Applesauce, Paula (00062) (DOB: 2000-05-15)

Results:

- Applesauce, Paula (00062) 05/15/2000
- Aschrute, Dwight (0370) 01/01/2000
- Baker, Doc (00052) 10/14/1901
- Banana, Hannah (0267) 07/12/1979

- Manage Groups for progress notes now allows users to delete a group that was added
- Updated the signature line label in Progress Notes from “anyone” to “individual”
- Client Appointment Export – added “Session Type”, “Start Time”, “End Time” and “Duration” as columns to the export.

- Enhanced layout and data displayed in the “Cumulative Summary of Services” report
- Added filter option for “All Clinicians” to the “Clinician Summary of Services” report

Summary of Services

Report Type
Clinician Summary Of Services

Clinician
All Clinicians

Date Range
01/01/2025 to 12/31/2025

Cancel View

- Added filter option for “All Clients” to the “Client Summar of Services” report
- Changed default state of the checkbox for “Make visible in portal” to unchecked, when uploading a file to the Client Summary

Client Summary

Applesauce, Paula (00062) (DOB: 2000-05-15)

Name: Paula Applesauce
Age: 24
DOB: 05/15/2000
Client ID: 00062

Upload File
Select File to Upload:
Choose File No file chosen

Description:
Document Author:
Document Created: 04/08/2025
Comments:

☐ Make this Visible in Portal

Upload and Close Upload and Next Cancel

- Increased maximum file size, for uploading into Client Summary, from 10MB to 15MB
- Improved workflow navigation in progress notes when completing Group Notes. After completing a group note, the user should be returned to the group note main screen.
- Added columns to Client Summary “Intervention”, “Session Date” and “Service Type” to help identify progress notes better.

Client Summary

Applesauce, Paula (00062) (DOB: 2000-05-15)

Name: Paula Applesauce
Age: 24
DOB: 05/15/2000
Client ID: 00062

Level of Care: Level 4 Medically Managed
Inpatient Treatment Location:
Balance: \$200.00
Next Appt: None

Paula Applesauce

Add Required Forms Upload File AI Tools Batch File as Complete Search

Description	Created By	Date Created	Date Due	Status	Intervention	Session Date	Service Type	Portal	Actions
South Dakota STARS Data System	Paul Le	03/20/2025		To Do					
Intake Form (OakTree)	Paul Le	03/20/2025		In Progress					
Progress Note: General	Paul Le	03/20/2025		In Progress	Assessed level of in ...	03/20/2025	Art Therapy		
Progress Note: General	Paul Le	03/19/2025		In Progress	Discussed symptoms ...	03/18/2025	After Care Support		
Status Report (Nicasa)	Paul Le	03/19/2025		Completed					

- Updated setup menu item locations for easier access
- Updated scoring and button behaviors for various screeners and questionnaires
- Fixed merge field issue in Client Portal to support all merge fields in custom forms. Previously, some of the merge fields were not auto populating forms.
- Activated required fields validation on forms sent to Client Portal. Previously, forms sent to client portal, that have “required fields” were not active.
- Updated Admission and Discharge reports to show Levels of Care that have been archived to ensure complete history is displayed.
- Updated display for time zones in Progress Notes. Current times are displayed in Universal Time (UTC). The date displayed should
- Enhanced Census Report to allow users to view the level of care for ALL clients as well as added more filters and column displays.

<div> Orion Behavioral Health 1234 Oak Street Omaha, Nebraska 68102 P: 800-324-7966 E: info@orionhealthcare.com </div> <div> <h2>Census Report</h2> <p>Report Date: 4/8/2025</p> <p>Primary Case Manager: 97</p> </div>						
Clinician	Client Name	Date of Birth	Age	Date Added	Current Level of Care	Location of Service
Able, Sally	Bob , Billy	10/10/1976	49	12/5/2023		
Adams, Ron	Albert, Jack	10/10/1980	45	2/18/2025		
Adams, Ron	Emerson, Simon	9/15/1976	49	1/27/2025		
Adams, Ron	Jenkins, Robert	6/7/1989	36	7/29/2024		
Adams, Ron	Solder, Brandon	12/19/1987	38	1/8/2025		
Boyce, Kaitlyn	Sanderson, Mary	2/13/1993	32	12/23/2024		
Boyce, Kaitlyn	Sanderson, Winifred	10/31/1993	32	12/23/2024	Level 3.7 Medically Managed Residential Treatment	

- General updates and enhancements to AI reports to include more parameters and fine tune reporting
- General server maintenance and minor bug fixes