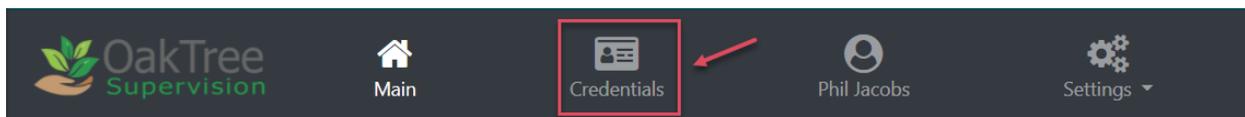


Supervisor Guide - Approving Hours

As a Supervisor of OakTree Supervision, you can approve hours of Supervisee who have applied hours to their credentialing records. The following steps show how to approve individual and batch hours to supervisees.

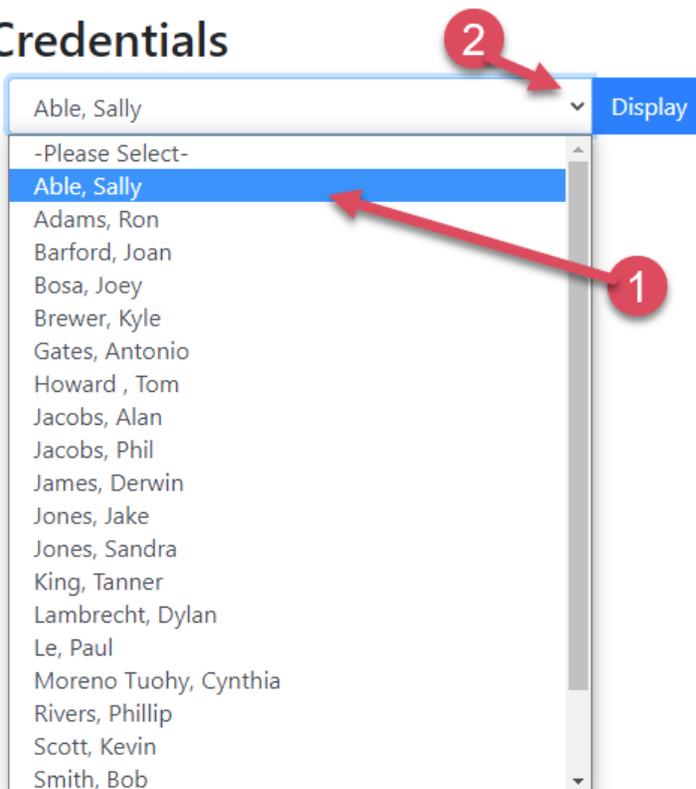
Approving an Individual's Credentials

Step 1 – Click the Credentials icon found on the OakTree Supervision ribbon.



Step 2 – Select a Supervisee from the list then click the [Display] to see their credentialing record(s).

Credentials



Supervisor Guide - Approving Hours

Credentials

-Please Select- Display

Able, Sally ✕ Supervise Credential Record

Assign Credential My Transcripts

Name	Start Date	Expire Date	Credential Type	Hour Type	Category	Hours Completed	Total Hours Remaining			
Sally Able	9/19/2021	9/19/2023	Advanced Peer in Training			0	559			
				Peer Supervision		0	25			
					Advocacy/Ethical Responsibility/Recovery & Wellness/Mentoring & Education	0	25			
				Work Experience		0	500			
					Advocacy	0	25			
					Ethical Responsibility	0	25			
					General	0	400			
					Mentoring & Education	0	25			
					Recovery & Wellness	0	25			
				Education		0	34			
					Continuing Education	0	16			
					AR Advanced Training	0	18			

Step 3 – Click the [My Transcripts] button for a list of the supervisee’s transcripts.

Credentials

-Please Select- Display

Able, Sally ✕

Assign Credential My Transcripts

Name	Start Date	Expire Date	Credential Type	Hour Type	Category	Hours Completed	Total Hours Remaining			
Sally Able	9/19/2021	9/19/2023	Advanced Peer in Training			0	559			
				Peer Supervision		0	25			
					Advocacy/Ethical Responsibility/Recovery & Wellness/Mentoring & Education	0	25			
				Work Experience		0	500			
					Advocacy	0	25			
					Ethical Responsibility	0	25			
					General	0	400			
					Mentoring & Education	0	25			
					Recovery & Wellness	0	25			
				Education		0	34			
					Continuing Education	0	16			
					AR Advanced Training	0	18			

Supervisor Guide - Approving Hours

Recommend clicking the pencil  icon before approving to review the applied hours and Verification File, if attached.

[Assign Credential](#) [Apply Hours](#)

Supervisee	Activity Date	Credential Acronym	Hour Type	Category	Activity Type	Supervisor Reviewed	Hours Applied	Status	
Sally Able	9/29/2021	A-PIT	Work Experience	Advocacy	Application Review		4	Pending Supervisor Review	 <input type="checkbox"/>

[Approve](#) [Export](#)

Step 4 – As the supervisor, you can edit the supervisee applied hour request and select any of the Approval Status to expect Approved. If you are a super administrator you will be able to select any of the given choices. Click the [Save and Exit] button you have completed this step.

Apply Hours

-Please Select Additional (if applicable)- [Add](#)

A-PIT, Work Experience, Advocacy ✕

Activity Date(s) to

Hours

Activity Type [Add](#) [Edit](#)

Description

Direct Indirect

Upload Verification Document No file chosen

Approval Status

- Supervisor Approved Pending Admin Review
- Approved
- Pending Supervisor Review
- Supervisor Approved Pending Admin Review
- Action Needed
- Denied

Super Admin can select any status

Supervisor can any status except Approved

Supervisor Guide - Approving Hours

Step 5 -Click the [Apply Hours] to return the supervisees list of applied hours

In this example as the supervisor, the status changes to the status of “Supervisor Approved Pending Admin Review”.

Apply Hours ←

Supervisee	Activity Date	Credential Acronym	Hour Type	Category	Activity Type	Supervisor Reviewed	Hours Applied	Status
Sally Able	9/26/2021	A-PIT	Work Experience	Advocacy	Application Review	Derwin James	4	Supervisor Approved Pending Admin Review

Approve Export

In this example, as the super admin, the status changes to “Approved”

Transcripts

-Please Select- Display

Able, Sally x

Assign Credential **Apply Hours** ←

Supervisee	Activity Date	Credential Acronym	Hour Type	Category	Activity Type	Supervisor Reviewed	Hours Applied	Status
Sally Able	9/18/2021	A-PIT	Work Experience	Ethical Responsibility	Continuing Education: Coping Methods	Ron Adams	3	Approved

Approve Export

The Hour Completed column reflects the approved hours for both the category and credential type.

Name	Start Date	Expire Date	Credential Type	Hour Type	Category	Hours Completed	Total Hours Remaining
Sally Able	9/19/2021	9/19/2023	Advanced Peer in Training			3	556
				Peer Supervision		0	25
					Advocacy/Ethical Responsibility/Recovery & Wellness/Mentoring & Education	0	25
				Work Experience		3	497
					Advocacy	0	25
					Ethical Responsibility	3	22
					General	0	400
					Mentoring & Education	0	25
					Recovery & Wellness	0	25
				Education		0	34
					Continuing Education	0	16
					AR Advanced Training	0	18

Supervisor Guide - Approving Hours

In the Transcripts, you will see all the applied hours from each supervisee.

Step 3 – Review each submitted applied hours by clicking the  pencil icon. You will be able to review, edit and change the status of each applied hour as shown earlier in this guide.

Transcripts

-Please Select- Display

Barford, Joan ✕ Jacobs, Alan ✕

Apply Hours

Supervisee	Activity Date	Credential Acronym	Hour Type	Category	Activity Type	Supervisor Reviewed	Hours Applied	Status	
Alan Jacobs	9/12/2021	PIT	Work Experience	Advocacy	Continuing Education: Coping Methods		6	Pending Supervisor Review	 <input type="checkbox"/>
Joan Barford	9/7/2021	PIT	Work Experience	Advocacy	Continuing Education: Coping Methods		10	Pending Supervisor Review	 <input type="checkbox"/>

Approve Export



Step 4 (Optional) – You are given the option to approve all the applied hours by clicking each of the boxes next to the pencil icon then the [Approve] button.

Transcripts

-Please Select- Display

Barford, Joan ✕ Jacobs, Alan ✕

Apply Hours

Supervisee	Activity Date	Credential Acronym	Hour Type	Category	Activity Type	Supervisor Reviewed	Hours Applied	Status	
Alan Jacobs	9/12/2021	PIT	Work Experience	Advocacy	Continuing Education: Coping Methods		6	Pending Supervisor Review	 <input checked="" type="checkbox"/>
Joan Barford	9/7/2021	PIT	Work Experience	Advocacy	Continuing Education: Coping Methods		10	Pending Supervisor Review	 <input checked="" type="checkbox"/>

Approve Export




Click the [Approve All] to continue or [Cancel] to back out

Batch Approve ✕

You are about to approve all the selected records. Do you wish to continue?

Cancel Approve All

Supervisor Guide - Approving Hours

Screenshot of Transcripts showing “Supervisor Approved pending Admin Review” from supervisor review.

Transcripts

-Please Select-

Barford, Joan Jacobs, Alan

Supervisee	Activity Date	Credential Acronym	Hour Type	Category	Activity Type	Supervisor Reviewed	Hours Applied	Status	
Alan Jacobs	9/12/2021	PIT	Work Experience	Advocacy	Continuing Education: Coping Methods	Derwin James	6	Supervisor Approved Pending Admin Review	<input checked="" type="checkbox"/> <input type="checkbox"/>
Joan Barford	9/7/2021	PIT	Work Experience	Advocacy	Continuing Education: Coping Methods	Derwin James	10	Supervisor Approved Pending Admin Review	<input checked="" type="checkbox"/> <input type="checkbox"/>

Screenshot of Transcripts showing results of “Approved” from admin review.

Transcripts

-Please Select-

Barford, Joan Jacobs, Alan

Supervisee	Activity Date	Credential Acronym	Hour Type	Category	Activity Type	Supervisor Reviewed	Hours Applied	Status	
Alan Jacobs	9/12/2021	PIT	Work Experience	Advocacy	Continuing Education: Coping Methods	Ron Adams	6	Approved	<input checked="" type="checkbox"/> <input type="checkbox"/>
Joan Barford	9/7/2021	PIT	Work Experience	Advocacy	Continuing Education: Coping Methods	Ron Adams	10	Approved	<input checked="" type="checkbox"/> <input type="checkbox"/>

Supervisor Guide - Approving Hours

Screenshot of applied hour showing update of Hour completed

Credentials

-Please Select- Display

Barford, Joan × Jacobs, Alan ×

Assign Credential My Transcripts

Name	Start Date	Expire Date	Credential Type	Hour Type	Category	Hours Completed	Total Hours Remaining		
Joan Barford	8/4/2021	2/4/2023	Core Peer in Training			16	1126		
				Work Experience		16	984		
				Advocacy		10	15		
				Ethical Responsibility		0	25		
				General		0	400		
			Mentoring & Education		0	25			
Alan Jacobs	8/2/2021	2/2/2023	Core Peer in Training			16	1126		
				Work Experience		16	984		
				Advocacy		6	19		
				Peer Supervision		0	50		
						Assigned Peer Supervisor		N/A	N/A
			Ethical Responsibility		0	25			
			Peer Supervision		0	50			
			Advocacy/Ethical Responsibility/Recovery & Wellness/Mentoring & Education		0	25			

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