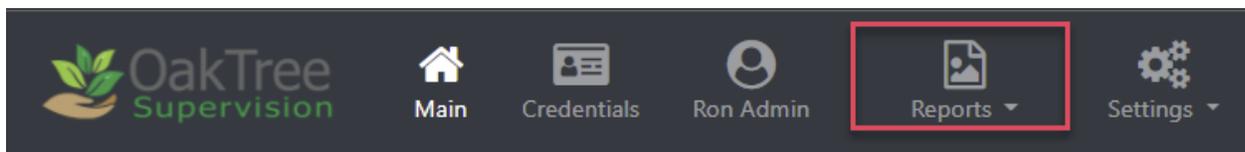


OakTree Credential Summary Report

The Credential Summary report provides Supervisee a report reflecting the status of their completed and uncompleted credential requirements. The Supervisor level of access can see their report and those users they supervise. The Super Admin can see all users in the database.

Viewing the Credential Summary Report

Step 1 – Look for the Reports Icon on the OakTree Supervision Ribbon



Step 2 – Click the dropdown arrow to see all available reports. Depending on your level of access, you may or may not see all the reports.

Here is guide showing the access level needed to see reports

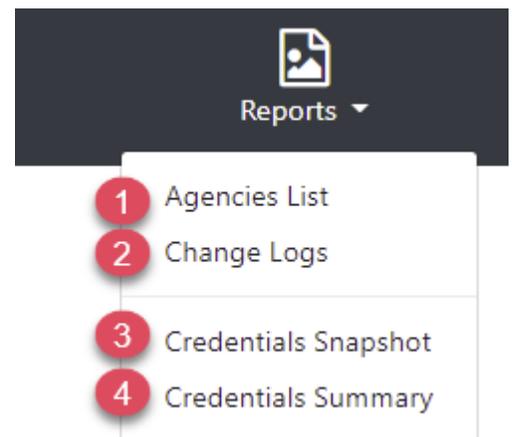
Super Admin 1, 2, 3, 4

Supervisor All Records 3 and 4

Supervisor All Records In Agency 3 and 4

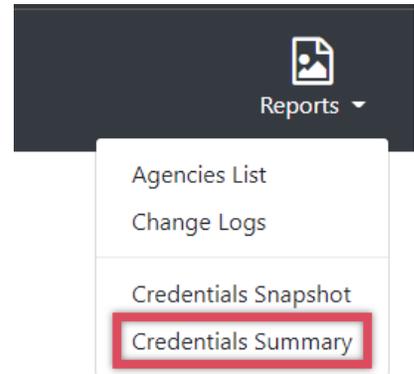
Supervisor Supervisee Records 3 and 4

Supervisee 3 and 4



OakTree Credential Summary Report

Step 3 – Select the Credentials Snapshot to see a similar display on your screen.



Orion Behavioral Health Services
18047 Oak Street
Omaha, Ne 68130

Credentials Summary

Date Printed: 1/20/2022

From Expire Date
1/1/2020

To Expire Date
1/1/2030

Name	Start Date	Expire Date	Credential Type	Hour Type	Category	Total Hours Needed	Minimum Direct Hours	Direct Hours Completed	Total Hours Completed				
Admin, Ron	9/19/2021	3/19/2023	Core Peer in Training	Education	AOBHS Core Training	30.00	30.00	0.00	0.00				
					Continuing Education	16.00	16.00	0.00	0.00				
					Total Hour	46.00	46.00	0.00	0.00				
				Peer Supervision	Advocacy/Ethical	25.00	25.00	0.00	0.00				
					Responsibility/Recovery & Wellness/Mentoring & Education								
					Assigned Peer Supervisor			0.00	0.00				
				Total Hour	25.00	25.00	0.00	0.00					
				Work Experience	Advocacy	25.00	25.00	0.00	10.00				
					Ethical Responsibility	25.00	25.00	0.00	7.00				
					General	400.00	400.00	0.00	0.00				
					Mentoring & Education	25.00	25.00	0.00	0.00				
					Recovery & Wellness	25.00	25.00	0.00	0.00				
					Total Hour	500.00	500.00	0.00	17.00				
				Total Credential						571.00	571.00	0.00	17.00
				Grand Totals						571.00	571.00	0.00	17.00

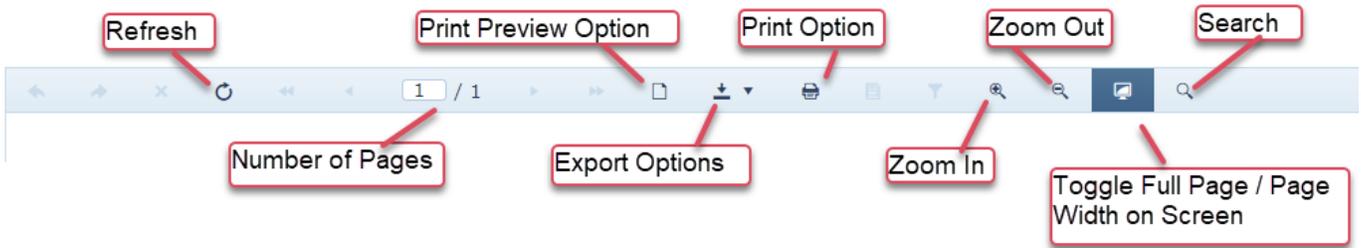
Change date filters to narrow down your dates

Click to preview date filter change

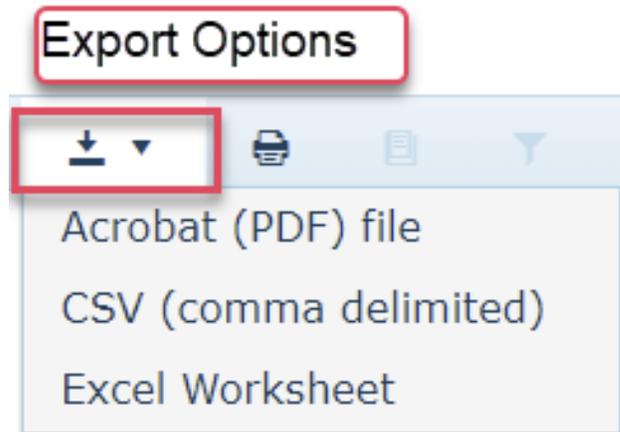
Preview

OakTree Credential Summary Report

Explanation of controls found above the on-screen report



List of export options available this report

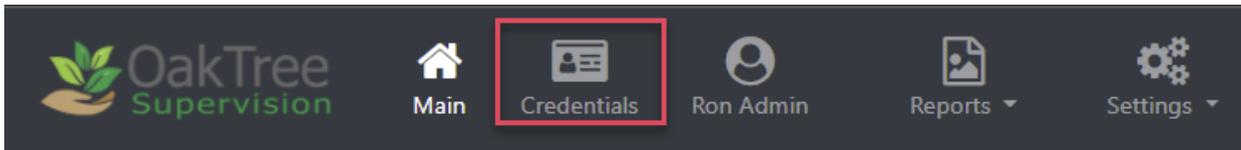


OakTree Credential Summary Report

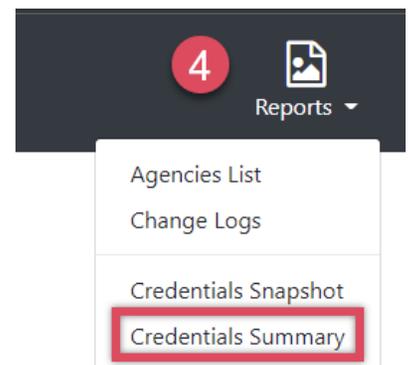
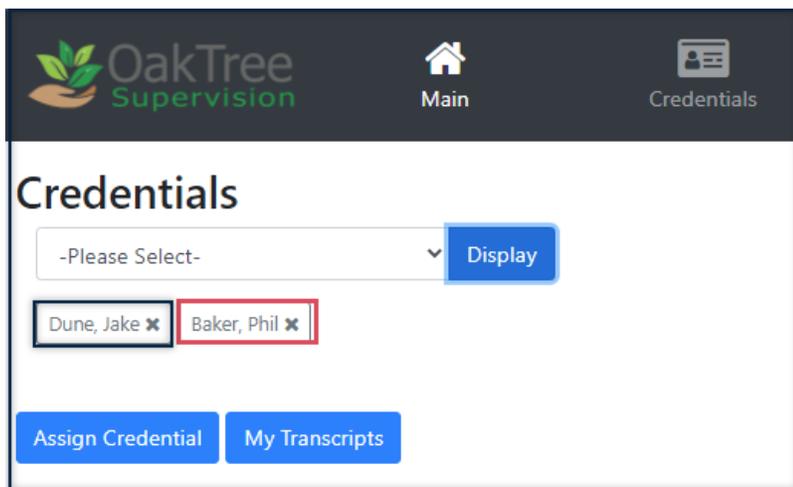
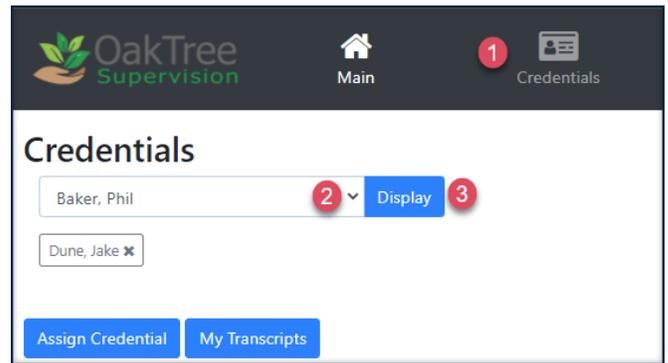
***** Special Note for Supervisors *****

Step 3 – As a supervisor assigned supervisees you will have the ability to look up their Credential Summary report as well.

- a) **Before Selecting the Credentials Summary report, you will first need to select your supervisees from the Credentials Icon on the Ribbon.**



1. Click Credential Icon
2. Choose your Supervisee
3. Click Display to add them below
4. Select Reports



OakTree Credential Summary Report



Orion Behavioral Health Services
 18047 Oak Street
 Omaha, Ne 68130

Credentials Summary

Date Printed: 1/20/2022

Name	Start Date	Expire Date	Credential Type	Hour Type	Category	Total Hours Needed	Minimum Direct Hours	Direct Hours Completed	Total Hours Completed
Dune, Jake	8/2/2021	2/2/2023	Core Peer in Training	Education	AOBHS Core Training	30.00	30.00	0.00	0.00
					Continuing Education	16.00	16.00	0.00	0.00
					Total Hour	46.00	46.00	0.00	0.00
				Peer Supervision	Advocacy/Ethical Responsibility/Recovery & Wellness	25.00	25.00	0.00	0.00

Baker, Phil	10/7/2021	4/7/2023	Core Peer in Training	Education	Mentoring & Education	400.00	400.00	0.00	0.00
					Recovery & Wellness	25.00	25.00	0.00	0.00
					Total Hour	500.00	500.00	0.00	0.00
					Total Credential	571.00	571.00	0.00	0.00
					AOBHS Core Training	30.00	30.00	0.00	0.00

Baker, Phil	10/7/2021	4/7/2023	Core Peer in Training	Education	Recovery & Wellness	25.00	25.00	0.00	0.00
					Advocacy/Ethical Responsibility/Recovery & Wellness	25.00	25.00	0.00	0.00
					Total Hour	46.00	46.00	0.00	0.00

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