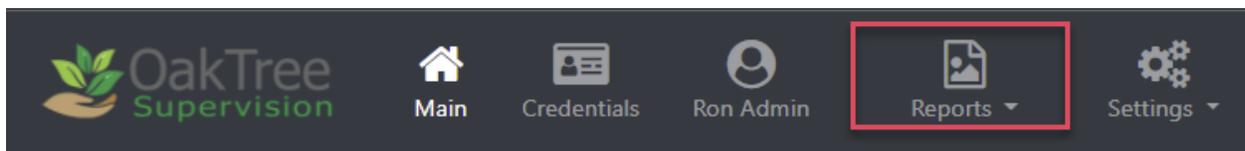


OakTree Credential Snapshot Report

The Credential Snapshot report provides a Supervisee 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 Snapshot 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

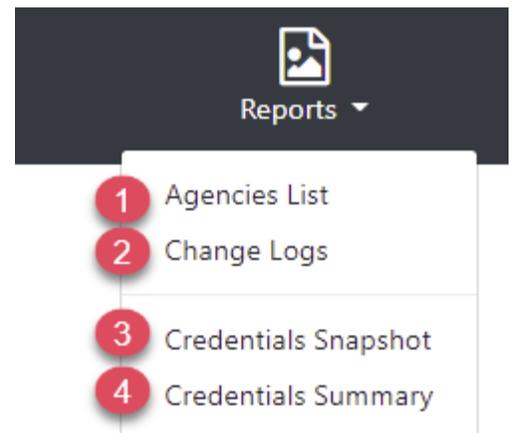
Super Admin 1, 2, 3, 4

Supervisor All Records 3 and 4

Supervisor All Records In Agency 3 and 4

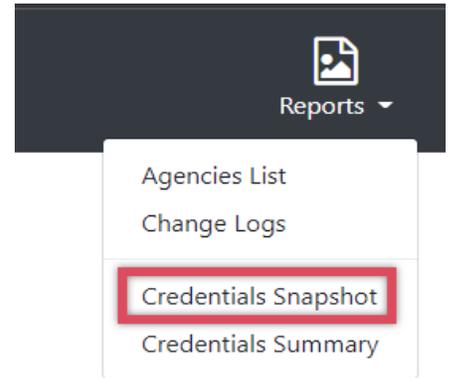
Supervisor Supervisee Records 3 and 4

Supervisee 3 and 4



OakTree Credential Snapshot Report

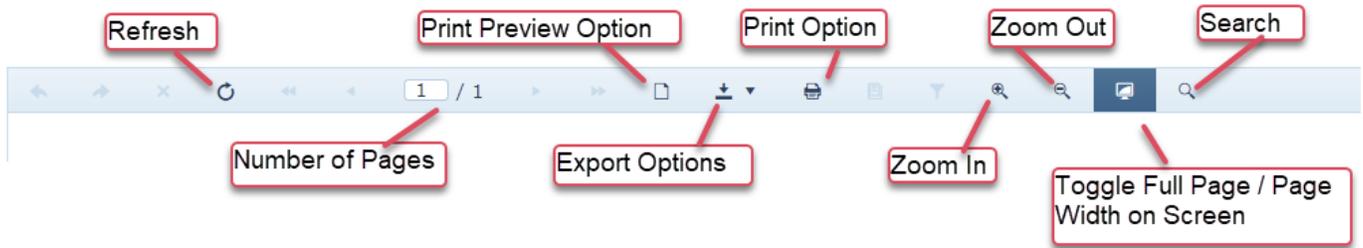
Step 3 – Select the Credentials Snapshot to see a similar display on your screen.



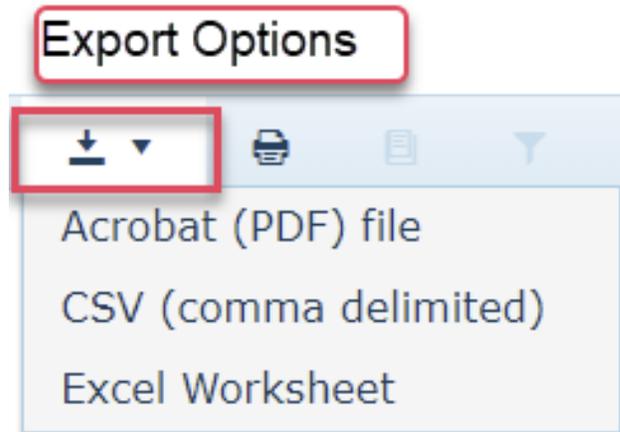
The screenshot shows a web application interface for a 'Credentials Snapshot' report. At the top left, the organization name 'Orion Behavioral Health Services' and address are listed. The main title is 'Credentials Snapshot' with a subtitle 'Date Printed: 1/20/2022'. The user's name is 'Name: Admin, Ron'. Below this, the 'Credential Requirements' section is displayed for 'Core Peer in Training'. It includes a pie chart showing '3% Completed' and '97% Left to Complete'. A callout box with the text 'Change date filter to narrow down your search' has arrows pointing to the 'From Expire Date' (1/1/2020) and 'To Expire Date' (1/1/2030) filters on the right. Below the pie chart, there are progress bars for 'Hour Type' (Education: 0% Complete) and 'Category' (AOBHS Core Training: 0% Complete, Continuing Education: 0% Complete). A wavy line separates this section from the next. The next section shows 'Hour Type' (Work Experience: 3% Complete) and 'Category' (Advocacy: 40% Complete). A callout box with the text 'Click to preview date filter change' has an arrow pointing to a 'Preview' button at the bottom right of the report area.

OakTree Credential Snapshot Report

Explanation of controls found above the on-screen report



List of export options available this report

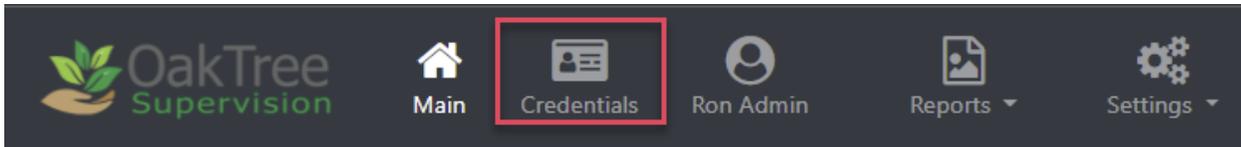


OakTree Credential Snapshot Report

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

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

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

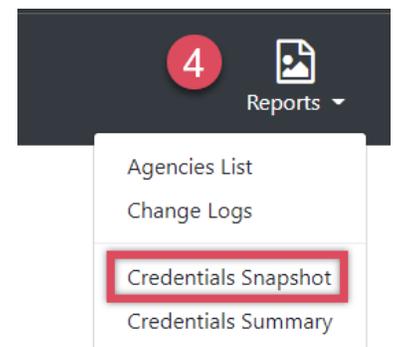
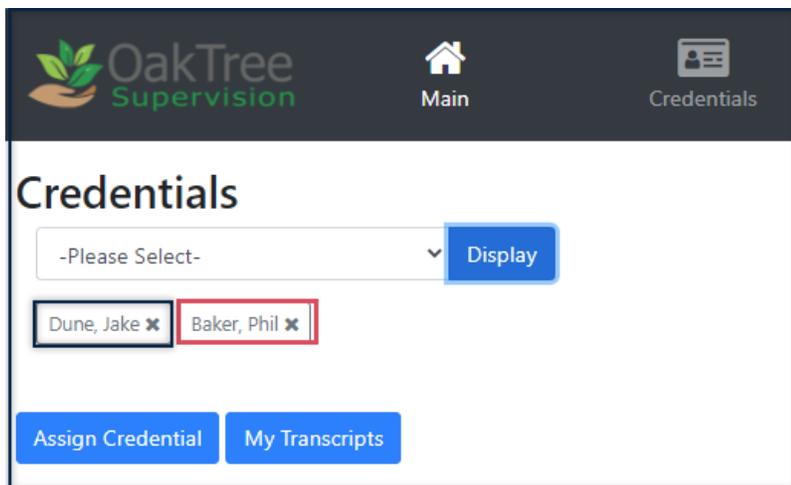
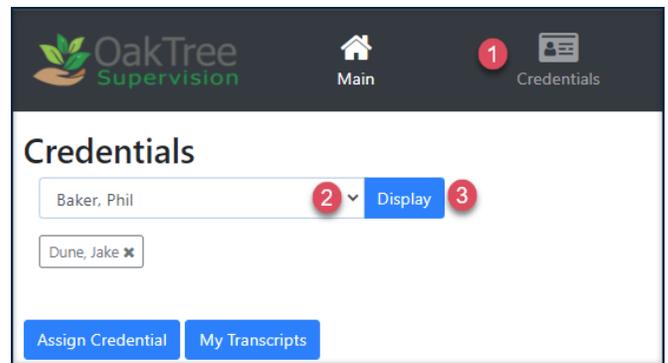


1. Click Credential Icon

2. Choose your Supervisee

3. Click Display to add them below

4. Select Reports



OakTree Credential Snapshot Report

b) Your selection of supervisees will show in the Credentials Snapshot report

Orion Behavioral Health Services
18047 Oak Street
Omaha, Ne 68130

Credentials Snapshot
Date Printed: 1/20/2022

Name: Dune, Jake

Credential Requirements

Credential: Core Peer in Training Requirements Completion %

Hours Required: 571.00 **Start Date:** 8/2/2021

Hours Completed: 0.00 **Expiration Date:** 2/2/2023

0% Completed
100% Left to Complete

Hour Type Education 0% Complete

0% 20% 40% 60% 80% 100%

0% 20% 40% 60% 80% 100%

Page 1 of 4

Orion Behavioral Health Services
18047 Oak Street
Omaha, Ne 68130

Credentials Snapshot
Date Printed: 1/20/2022

Name: Baker, Phil

Credential Requirements

Credential: Core Peer in Training Requirements Completion %

Hours Required: 571.00 **Start Date:** 10/7/2021

Hours Completed: 10.00 **Expiration Date:** 4/7/2023

2% Completed
98% Left to Complete

Hour Type Education 0% Complete

0% 20% 40% 60% 80% 100%

Category AOBHS Core Training 0% Complete

0% 20% 40% 60% 80% 100%

Category Advocacy 40% Complete

0% 20% 40% 60% 80% 100%

Page 3 of 4

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