

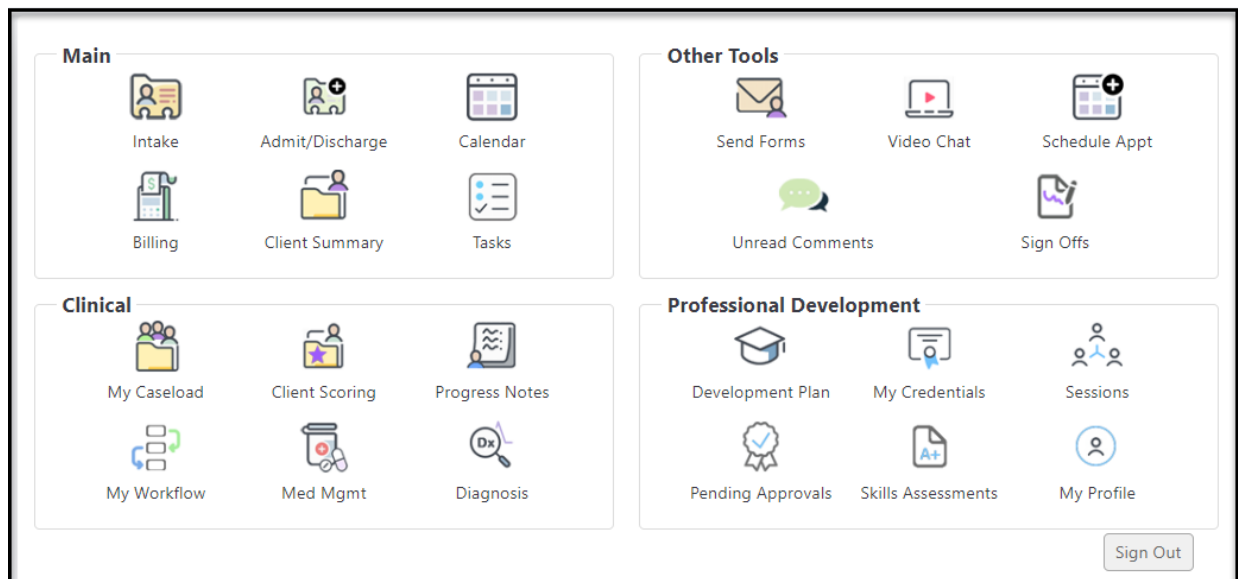
Release Notes: OakTree Practice Management v3.2

Enhancements and Bug Fixes - Summary

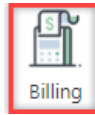
In this recent update, there were numerous maintenance and bug fixes, including:

- New Feature: Main Menu
- New Feature: Client Intake Module
- New Feature: Episodes of Care (Admission/Transfer/Discharge)
- New Feature: Client Profile Header
- New Feature: Medication Management
- New Feature: Progress Notes Review and Sign off
- Additional Screening and Eval Tools (currently over 70+)
- Additional Reports: Clinical Summary of Services
- Various system optimization and bug fixes

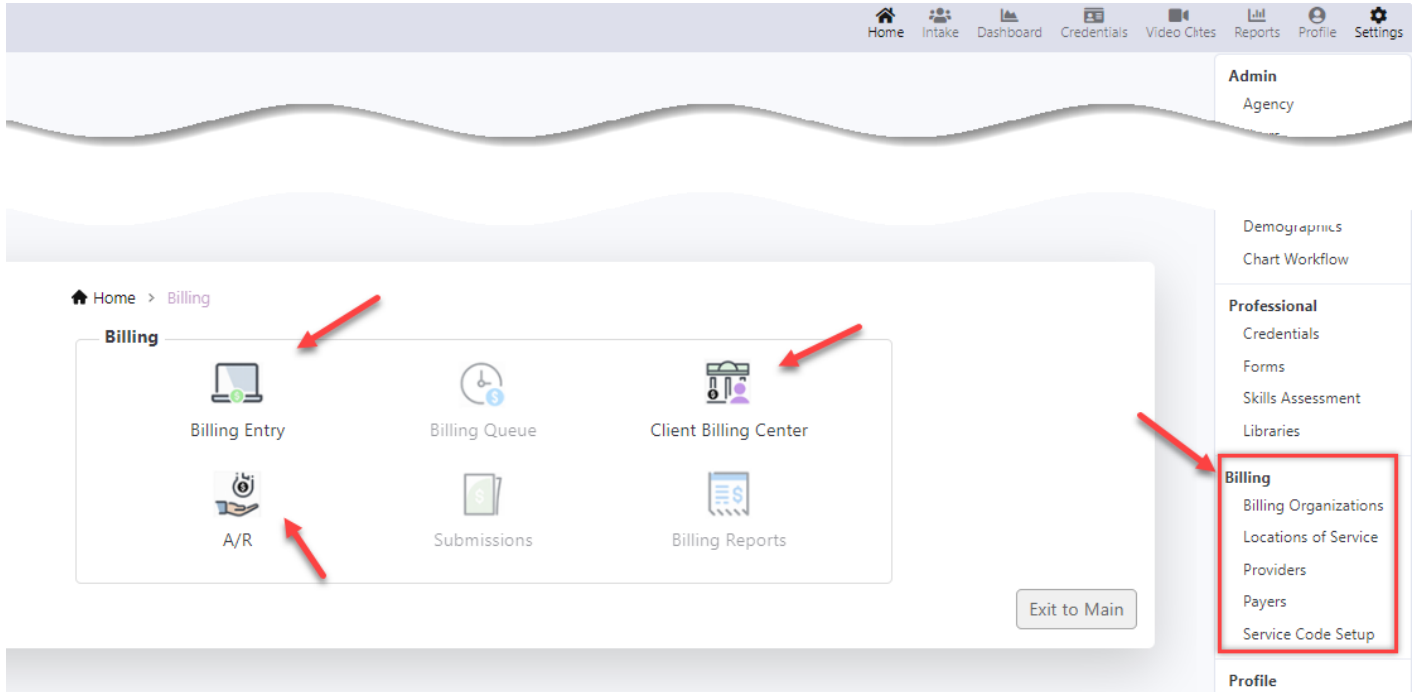
1. **New Main Menu** – provides an intuitive and user-friendly interface to find the most used modules.



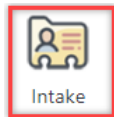
Billing module –



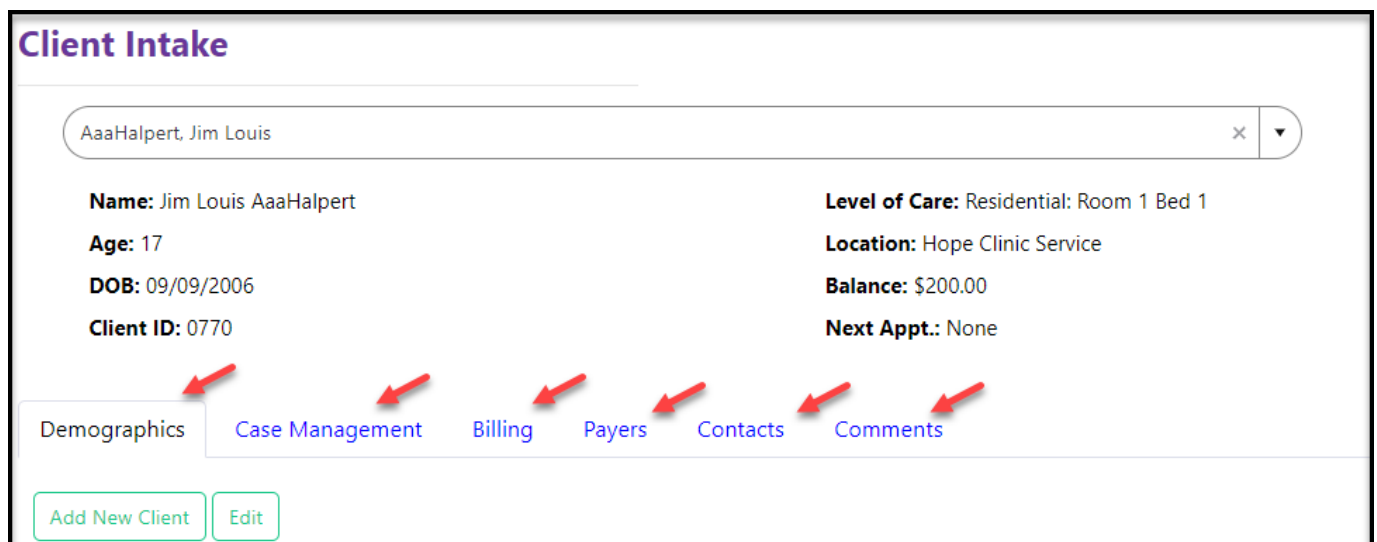
You will find new options under Settings to set up Billing Organizations, Locations of Service, Providers, Payers, and Service Code Setup. Included under the Billing menu you will find initial development of Billing Entry, A/R, and Client Billing Center modules with more features to be added in future releases.

A screenshot of a software interface showing the Billing module. The top navigation bar includes Home, Intake, Dashboard, Credentials, Video Clites, Reports, Profile, and Settings. A sidebar on the right lists Admin (Agency), Demographics, Chart Workflow, Professional (Credentials, Forms, Skills Assessment, Libraries), Billing (Billing Organizations, Locations of Service, Providers, Payers, Service Code Setup), and Profile. The main content area shows a 'Billing' section with icons for Billing Entry, Billing Queue, Client Billing Center, A/R, Submissions, and Billing Reports. Red arrows point to the Billing icon in the top navigation, the Billing menu item in the sidebar, and the Billing Entry, Client Billing Center, and A/R icons in the main content area. An 'Exit to Main' button is located at the bottom right of the Billing section.

New Client Intake module –



We have centralized Client Intake to provide access to Demographics and Case Management including a location to add Billing information and Payers for quick reference. The Contacts Tab provides a place to enter contact information and referrals associated with the selected client. Comments create a place to author a note, document the date and time, and organize by type.

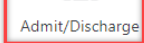
A screenshot of the Client Intake interface. At the top, there is a search bar containing 'AaaHalpert, Jim Louis'. Below the search bar, client information is displayed in two columns: Name: Jim Louis AaaHalpert, Age: 17, DOB: 09/09/2006, Client ID: 0770 on the left; and Level of Care: Residential: Room 1 Bed 1, Location: Hope Clinic Service, Balance: \$200.00, Next Appt.: None on the right. At the bottom, there is a navigation bar with tabs for Demographics, Case Management, Billing, Payers, Contacts, and Comments. Red arrows point to each of these tabs. Below the navigation bar are two buttons: 'Add New Client' and 'Edit'.

Client Profile Header – This client profile header provides the user with a quick look at the Level of Care, Location of Service, balance, and next appointment. From Client Intake, the user has additional functions to Admit the client, schedule an appointment, send forms through the Client Portal, Edit the profile picture, setup notification for the client and reset the clients portal password.

Client Intake provides a quick look.

Edit and reset the client password to Client Portal

From Client Intake module you can jump straight to Episodes of Care, Scheduler, Send Forms

Episodes of Care module – You will find the new Episode of Care under the  Admit/Discharge Icon from the Main Menu.. You will be able to create Episodes, add one or more Levels of Care, Transfer between levels of care, discharge and close the episode. You can also document Units, Rooms, and Beds.

Episodes of Care for: Jim Louis AaaHalpert

Episode 1: 07/17/24 (Active) [+ Open New Episode](#)

[Add Level of Care](#) [Close Episode](#)

Discipline	Level of Care	Status	Location of Service	Room/Bed	Admit Date	Discharge Date	Actions
Addiction Level of Care	Residential: Room 1 Bed 1	Admitted	Hope Clinic Service	None/None	07/18/2024	-	← → ⚙
BID	Level 1	Admitted	-	None/None	08/06/2024	-	← → ⚙
Mental Health	Second Description	Admitted	Monarch Outpost	None/None	08/06/2024	-	← → ⚙

Showing 1 to 3 of 3 rows

[Select Different Client](#) [Close](#)

Medication Module –



This module is used to record your client’s medications from the NIH list and add instructions. Users can also document allergies as well as track Client Vital Signs.

Client Medication

Select client ▼



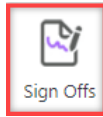
Name: Dennis Aardvark **Level of Care:** Early Education
Age: 24 **Location:** Cook County Hospital
DOB: 06/04/2000 **Balance:** \$91.00
Client ID: 0881 **Next Appt.:** None

Admit
 Schedule
 Send Forms
 More

Medications + Add Medication								
Medication	Sequence	Dose	Form	Frequency	Start Date	End Date	Active	Edit
ibuprofen 400 MG Oral Tablet [Ibu]	1	1	Oral Tablet	As directed	2024-07-24	2024-08-16	Yes	✎
ibuprofen 600 MG Oral Tablet [Ibu]	1	1	Oral Tablet	As directed	2024-07-24		Yes	✎
ibuprofen 800 MG Oral Tablet [Ibu]	1	1	Oral Tablet	Every four to six hours	2024-07-23		Yes	✎

Allergies + Add Allergy				
Allergy Type	Allergy	Reaction	Severity	Edit
Other Allergy	peanuts	breaks out in rash	Low	✎

Client Vital Signs + Add Vital Signs											
Initial Date		End Date									
mm/dd/yyyy		mm/dd/yyyy		Filter on Date							
Recorded				Heart Rate		Respiratory		Blood			
Date	Time	Temperature	Unit	bpm	Rate	Pressure	Position	Sugar Level	Height	Weight	Edit
2024-08-08	19:38:00	98.6	Fahr	60	-	120/70	Sitting	-	59 In	165 Lbs	✎



Progress Notes Sign Off -

This module provides a central location where the sender and receivers are given a list of requested signoffs, for example, to a supervisor or other user. Users can send progress notes, to a supervisor or other staff, for review and request for their sign off. The Signer can select multiple notes and sign off in batches for more efficiency. Future releases will include review and sign off on forms.

[Batch Sign Selected Items](#)

My Signoffs

<input type="checkbox"/>	Author Name	Document	Document Date	Client Name	Client ID	Pending Signatures	Your Role	Comments
<input type="checkbox"/>	Jones, Sandy	Progress Note: General	07/30/2024	Jones, Sandy	0238	• Ron Alaj, LCSW, CS Level II	Other	
<input type="checkbox"/>	Jones, Sandy	Missed Appointment Notes	07/23/2024	Aabucus, Sam	1077	• James Kirk • Ron Alaj, LCSW, CS Level II	Other	
<input type="checkbox"/>	Jones, Sandy	Progress Note: General	07/18/2024	Jones, Sandy	0238	• Ron Alaj, LCSW, CS Level II	Other	
<input type="checkbox"/>	Jones, Sandy	Progress Note: General	07/15/2024	Jones, Sandy	0238	• Ron Alaj, LCSW, CS Level II	Other	
<input type="checkbox"/>	Jones, Sandy	Progress Note: Detailed	06/27/2024	Aabucus, Sam	1077	• Ron Alaj, LCSW, CS Level II	Other	

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Other Pending Signoffs

<input type="checkbox"/>	Author Name	Document	Document Date	Client Name	Client ID	Pending Signatures	Send To	Your Role	Comments
<input type="checkbox"/>	Alaj, LCSW, CS Level II, Ron	Adolescent and Young Adult Health Questionnaire (11-20 Years)	07/29/2024	Aardvark, Dennis	0881	• Sandy Jones		Author	

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Additional Reports –

- Summary of Services
- Client Demographics Export
- Attendance Status
- Demographics Charts/Grafts

Cumulative Summary of Services

All Agencies

Date Printed: 8/8/2024

1/1/2024 to 12/31/2024

Session Type	Duration (Hours)
24-Hour Crisis Line Response Call	78:55
After Care Support	1:00
Anger Management	3:45
Art Therapy	24:15
Budget Meeting	23:00
Crisis Outpatient Psychotherapy	16:18
Daily Notes: Residential	19:20
Daily Notes: Residential	8:30
Family Session with client present	6:00
Family Session without client present	7:45
Group Session	50:59
In-house Video Conference	5:45
Individual Session	29:30
Intake Evaluation	4:00
Shift Note	0:30
Spiritual Guidance	9:00
Tele-health	3:00
Total:	291:32

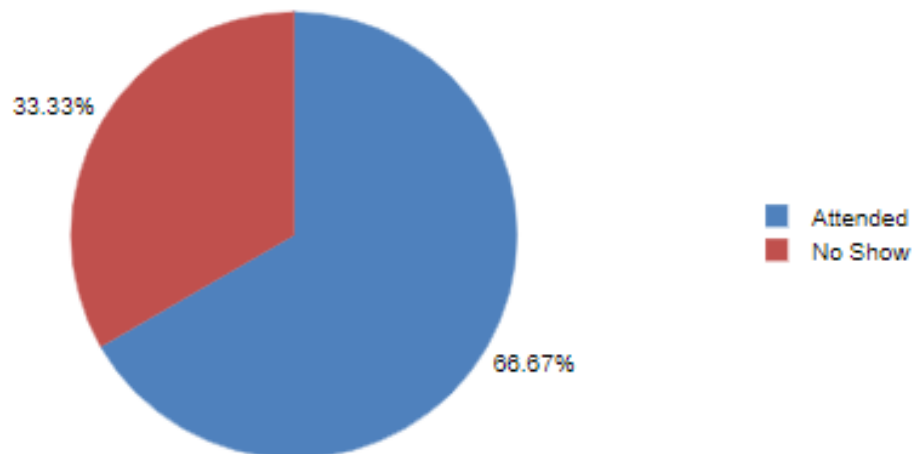
Attendance Summary Status

Report Date: 8/8/2024

Clinician	Co-Facilitator	Service Type	Client	Attribute	Date Start	Date End
Jones, Sandy		Anger Management	Able, Jane; Able, Janet ; Albert, Jack; Beta, Alan		01/01/2024	12/31/2024

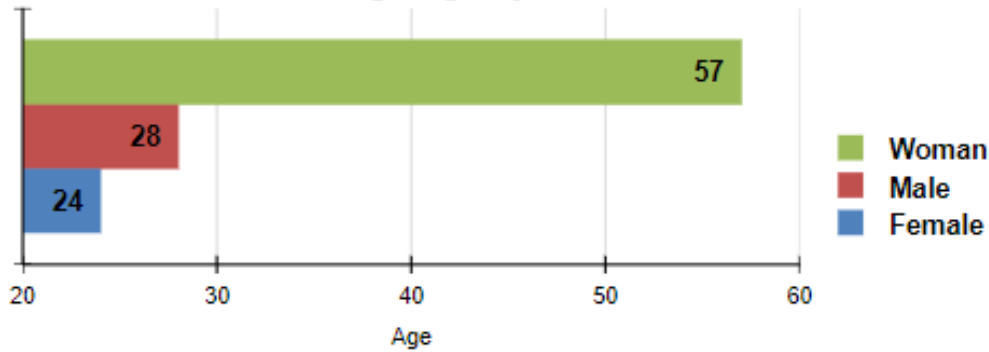
Service Type	Attended	Canceled	Confirmed	Left Message	No Show	Office Canceled	Rescheduled
24-Hour Crisis Line Response Call	0	0	0	0	0	0	0
After Care Support	0	0	0	0	0	0	0
Anger Management	2	0	0	0	1	0	0
Art Therapy	0	0	0	0	0	0	0
	0	0	0	0	0	0	0

Content	Attended	Canceled	Confirmed	Left Message	No Show	Office Canceled	Rescheduled
Individual Session	0	0	0	0	0	0	0
Intake Evaluation	0	0	0	0	0	0	0
None	0	0	0	0	0	0	0
Shift Note	0	0	0	0	0	0	0
Spiritual Guidance	0	0	0	0	0	0	0
Tele-health	0	0	0	0	0	0	0
Total	2	0	0	0	1	0	0

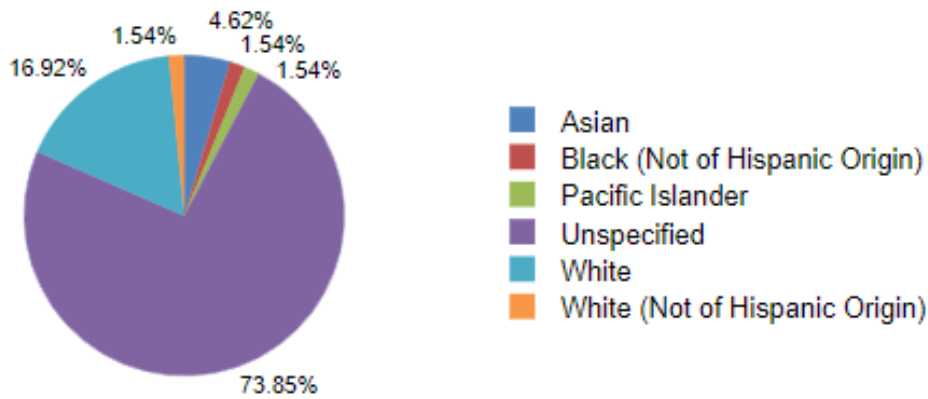


User Demographic Summary

Average Age by Gender



Count of Race



Ethnicity

