Cycle 12 (11/01 - 11/29) Change Log

BT Tech 🤖 Team Summary:

- 17 💡 Features Added
- 7 🪲 Bugs Squashed
- Some Highlights:
    - Users can now attach multiple documents on emails to clients and contacts.
    - Users can no longer create progress notes on manager consults. All emails sent from manager consults will now become regular notes, and old progress notes were turned into regular notes.
    - Service approvals will no longer get attached to old client cases when scheduling with the KGA CC. They should now consistently show on the correct intake.

Feature Improvements/Additions:

- Removed progress notes from manager consults. All progress notes were turned into regular notes.
- Changed redirection after claiming an affiliate placement so that the user goes to the affiliate placement, rather than staying on the list of placements.
- Added “Health and Welfare” as a custom benefit type for CT Children’s Hospital.
- Updated communications to event vendors to have Jennae’s contact information, rather than Tiffany’s contact information.
- Added information regarding new session cancellation policy onto affiliate invoices.
- Removed Portuguese as a language option for affiliates, and added European Portuguese and Brazilian Portuguese.
- Added ability to remove contacts and intakes from manager consults.
- Updated affiliate and provider emailing system.
    - Replies now show in a thread with the original email.
    - Emails from the affiliate or provider are now forwarded straight to the researcher or counseling assistant, so that they can reply in gmail rather than going back into BT to reply.
    - A research note is now created on the intake with the email body after emailing a provider or affiliate regarding that intake.
- Added link to Broad childcare guru card in details section of a task when that task is a childcare search for a Broad employee.
- Added the ability to attach multiple attachments on an email to a client or a consult.
- Added legal tipsheet on confirmation email to clients with a legal consultation.
- Removed “budget” as a prompt under details on childcare tasks, and added “start date”.

- Added brady@kgreer.com on error alerts regarding affiliates not being set up properly in QuickBooks.
- Added referral case managers's phone numbers under table of referral case managers on life services organization profiles.
- Updated Perspectives's access to Concern's cases.
  - Perspectives case managers can now see concern cases in their tables of cases.
  - Perspectives case managers populate as options for referral case managers on concern cases.
  - When Perspectives case managers enter in a case, they can indicate that it's a concern case.
- Added a self-service option on concern cases. This option should be selected when a referring case manager is not applicable to the case.
- Added weekly email to Lauren Grover with worklife intakes that were completed that week.

Bug Fixes:

- Added locations back onto contact profiles.
- Added contact notes back under organization notes, and made it possible to create organization notes again.
- Fixed service approvals and case managers getting attached to old cases when assigning a case to a CC counselor.
- Fixed errors related to advance searching affiliates.
  - Searching by location no longer causes an incorrect number of pages to display at the bottom of the affiliate list.
  - Made options for populations which affiliates see consistent across Big Top.
- Added a warning on emails with a blank to address to limit 500 errors.
- Stopped alert for a vendor adding feedback on an event from happening when partners create a provider search.
- Reinstated the ability to sort and export the table of events on organization show pages.