Cycle 7 (06/13 - 07/08) Change Log

BT Tech 🤖 Team Summary:

- 16 💡 Features Added
- 8 🪲 Bugs Squashed
- Some Highlights:
    - Affiliates who do not have physical addresses will now display on affiliate placements if they fit the placement's criteria and they have a mailing address near the client's location.
    - Addresses will no longer be removed from worklife tasks when the case manager is changed.
    - SAP and ROI forms have been updated in Big Top, and users now have the ability to preview the documents before sending them to the client.

Feature Improvements/Additions:

- If an affiliate does not have a physical office, their mailing address will populate on the affiliate placement show page instead.
    - If the affiliate has multiple mailing addresses and no physical address, then multiple mailing addresses will populate.
- Relabeled Eligible Exceptions and Ineligible Exceptions to Included and Not Covered.
- Updated SAP and ROI forms. Additional forms can be sent and a different ROI is sent if it is a SAP case.
- Completing an affiliate placement with group practices now automatically creates a note with the email that was sent out.
- Added Amy Kizirian's calendar for Bentley cases.
    - Also added email to client with location.
- Removed "Emergency" as an option for urgency on provider searches.
- Updated the text editor for specialities on the KGA CC counselor page.
- Added ability to email providers and affiliates, and receive replies in Big Top.
    - Emails can be sent from the show pages of providers and affiliates, or from provider search and affiliate placement pages.
- Made priority column on worklife tasks the leftmost column.
- Made it possible to view the data which goes into the End of Week email.
- Expanded the date range to be thirty days into the past and future for intakes being connected to a manager consult.
- Updated weekly data being sent to Anjala and Laura to be more useful.
- Added more categories for worklife vendor types.

    - Added: Lactation, Sleep, Therapy Resource.
- Gave Lex and Jennae access to all banners (work-life, counseling, and manager consults)
- Two alerts related to SAP cases will now go out to case managers. When a SAP case is created, an email and a task will go to the account manager requesting that the account manager alert HR. When the SAP case is closed, another email and task will go to the account manager requesting that the account manager bill the org.
- Removed ability to remove case manager on a work life case.

Bug Fixes:

- Stopped New Case Manager alert from going out every time a case was updated.
- Fixed error that was preventing worklife tasks from being created.
- Fixed error on worklife tasks page caused by claimed tasks going back to unclaimed.
- Fixed error on provider pages from emails to providers having a nil provider search id.
- Added the arrows for the events calendar back in.
- Fixed the bug that was resulting in addresses being removed from worklife tasks after changing who the task was assigned to.
- Fixed date and time on emails about affiliate placements with FCA.
- Fixed 500 error showing on provider show pages.