User Cycle 9 (08/08 - 09/06) Change Log

BT Tech 🤖 Team Summary:

- 14 💡 Features Added
- 11 🪲 Bugs Squashed
- Some Highlights:
    - Added the ability to create banner messages on intakes and manager consults from the associated organization page. Only certain users have the permission to do this, but other users can suggest banners which will then be reviewed by Laura or Meg.
    - Added a new status for cases which are associated with the CC. Cases which are with the CC will have a purple circle next to the client's name.
    - Added color coding on My Tasks based on due date. When the due date is extended, the task's color changes accordingly.

Feature Improvements/Additions:

- Added disabled complete button in the place of the complete button on tasks for users who aren't assigned to the task.
- Added organization account balances onto the organization index page.
- Added request for a response to portal emails.
- Added information on stamford police clients to the top of affiliate placements.
- Added ability to track where clinicians are licensed and search on it.
- Added Meg on Today's Activity.
- Set up renewal alerts for account managers.
    - Account managers will be notified via task that their client is up for renewal 120 days before. The task will have a due date of 30 days out.
- Gave partners (Amy, Nicole, Fatimah) the ability to create provider searches.
- Added new case status for cases which are assigned to the CC.
    - The new status is purple.
- Made it possible to add banners on intakes and manager consults. Only select users can add banners, while other users can suggest banners.
    - Read more here
- Made start and end dates on alerts required. Added ability to set reminder that alert is about to expire.
    - Read more here.
- Added same gender options across Big Top. Options include: Male, Female, Non-Binary, and Undisclosed.

- Made it possible to edit access modality and dates of service on received service approvals. Also added the ability to record canceled sessions on service approvals when receiving or editing the service approval.
- Added color coding on My Tasks based on due date. When due date is extended, the task's color changes accordingly.

Bug Fixes:

- Fixes related to the Research Portal:
    - Updated text in emails, fixed phone numbers so that they'll be formatted correctly.
    - Fixed formatting on emails from research portal, changed subject line, fixed typos in email body.
    - Fixed broken link in research portal email body.
- Fixed bug that was periodically causing multiple pages to throw 500 errors. The issue was being caused by providers without names or practice names.
- Added Husky back in as an insurance option.
- Fixed the formatting on emails related to user hour submission.
- Made it possible to dismiss the "10 minutes to timeout" pop-up window.
- Removed Susan off of SAP related alerts for account managers.
- Made it possible to set locations on utilization reports.
- Fixed text boxes for details on project and event receivables.
- Updated dashboard to include the intake writer instead of the case manager.
- Improved emailing system for affiliates and providers.
    - This will match emails being sent from BT accurately to profiles when there are multiple profiles with that email.
    - Will also apply emailing system to clinicians who have an email address stored as part of their profile.
- Fixed hover for last note added on provider searches.