Cycle 11 (11/06/2023 - 11/27/2023) Change Log

BT Tech 🤖 Team Summary:

- 14 💡 Features Added
- 6 🪲 Bugs Squashed
- Some Highlights:
    - Completed the “Upstairs Remodel” project. Creating intakes will now be more intuitive and reliable. Referrals will be recommended to the case manager according to the issues selected on the intake.
    - Updated contacts to allow for differing levels of access to the CRC and KGA mailings. All contacts will now be created and updated from one place on the contact’s organization page.
    - Added a calendar where affiliates can indicate times when they are free to see clients. The Counseling Assistants can also make updates to the calendar.

Feature Improvements/Additions:

- Remodeled intakes to:
    - Closely model the conversations that case managers have with clients, eliminating the need to “jump around” and search for relevant fields.
    - Push useful information to the case manager as the intake is happening, such as the client’s age calculated based on DOB, details of past cases, important client organization details, etc.
    - Allow case managers to save as they go, which will eliminate lost information.
    - Suggest recommended next steps for clients based on the details of the intake.
- Updated contacts to allow for differing levels of access to the CRC and KGA mailings. All contacts will now be created and updated from one place on the contact’s organization page.
- Added a calendar where affiliates can indicate times when they are free to see patients. When changes are made to the calendar, an email will go to the counseling team with all of the changes.
- Added the ability to filter contacts by account manager and view the emails of contacts in one exportable table.
- Added the ability to deactivate CISD partners.
- Added a link to Harvard’s directory to Harvard intakes.
- Updated Big Top to keep a record of completed reception tasks. Added reception tasks to Management’s Productivity Dashboard.

- Separated out upcoming renewals and terminating organizations into their own tabs on the organization index page. Once organizations decide to renew or terminate, they are removed from the Upcoming Renewals tab.
- Add profiles for CC counselors to Big Top. CC Counselors can now fill out a form with personal information, and this will display to case managers when scheduling a client with the counselor.
- Updated the provider portal's disclaimer to include: "We strongly recommend contacting your health insurance carrier before starting with any provider, as you will be financially responsible for fees not covered by insurance."
- Removed tiles meant for vendors from Account Manager dashboards.
- Moved the graphs on the Today's Cases page to the bottom of the page.
- Added a prompt to create a note when deactivating an affiliate.
- Alphabetized group practices in dropdown of group practices to assign to a case.

Bug Fixes:

- Fixed vendor profiles so that emails will now correctly display again.
- Fixed bug that was preventing alerts to affiliates regarding rate changes from being sent out.
- Fixed inconsistent spacing on emails to clients. Now, emails received by clients should reflect the same line spacing used when writing the email.
- Fixed issue that was preventing recurring tasks alerts from going out.
- Added a warning message that will let users know when a progress note is interpreted as blank before the note is submitted.
- Added Laura Jacobson back to the counseling productivity report. Sorted the report alphabetically.