Cycle 12 (12/04/2023 - 12/25/2023) Change Log

BT Tech 🤖 Team Summary:

- 15 💡 Features Added
- 16 🪲 Bugs Squashed
- Some Highlights:
    - Fixed the issues that were preventing notes and intakes from saving.
    - Fixed the inconsistencies with updating contacts and made it possible to update contacts from their profile page.
    - Applied various counselor suggestions to the process of writing an intake. Some updates include: adding spellcheck, changing the format for birth dates, adding location based filtering on suggested referrals, etc.

Feature Improvements/Additions:

- Updated filtering on interventions so that Talkspace is green when the client's insurance is accepted by Talkspace.
- Updated the form for creating an affiliate placement on intakes so that data persists after closing and reopening the form.
- Updated the form for creating tasks on an intake so that after submitting a task, the information won't still be there when creating a second task.
- Restyled links for interventions on an intake so that all links show consistently as buttons.
- Added spell-check to textboxes on intakes.
- Changed the formatting for a client's DOB (mm/dd/yyyy).
- Made the instructions for the affiliate event calendar more obvious. Additionally, updating an affiliate event will now redirect the user back to the calendar.
- Added location based filtering to interventions on an intake.
    - The counseling center will only appear as an option if the client is based in New England. David Smith and Jim Jacobson will only appear as options when the client is based in Massachusetts. Ryan Poirier will only appear for clients based in MA, VT, NH, ME, RI.
- Added the different bookshelf options that organizations can choose from to organization pages. Added an automated reminder to Account Managers for policies that will expire.
- Updated save confirmations on intakes so that they automatically disappear once the user saves again.

- Updated the display of contacts so that primary and secondary contacts are in their own table, CRC levels are displayed instead of roles, and the indicator of a CRC account is displayed next to the contact's name.
- Updated the process for adding a poster contact. Now, the number of posters will automatically be requested.
- Updated HR Meetings:
  - Replaced the "recap" with the first note created on meetings table on the organization show page. Removed the ability to add a recap.
  - Removed the ability to add contacts to an HR Meeting. Replaced this ability with an open text field called "Attendees".
  - Added the ability to indicate a start time and end time on meetings.
- Improved the load times for organization notes.
- Updated the mileage rate on projects from $0.625 per mile to $0.67 per mile.

Bug Fixes:

- Fixed the issue with notes saving blank.
- Fixed the saving issue that was causing fields on an intake to become blank.
- Fixed bug that was preventing associated tasks from being created along with a provider search.
- Removed button to open a worklife vendor's scheduling link when the vendor does not have a scheduling link.
- Fixed issue that was causing contact notes to show on the wrong contact page.
- Fixed issue that was preventing users from editing multiple addresses, emails, or phone numbers on an intake.
- Added emails and phone numbers to group practices. Fixed the confirmation email to clients that listed the email address of the practice's administrator instead of the phone number.
- Fixed errors with importing providers from psychology today with missing profile information.
- Fixed error that was preventing the "Complete" checkbox on tasks from working.
- Restored Anjala's access to the management section of Big Top.
- Updated the table of "Upcoming Organizations" on Account Manager dashboards to only include organizations that are not already clients.
- Fixed error being caused by an active organization not having an account manager.
- Fixed the issues with updating billing contacts on organizations.
- Updated contact profile pages to be consistent with the new contact fields. Contacts can now be updated from their profile page.

- Fixed error on organization profile pages that was causing tasks assigned to the reception team to show as research tasks.
- Updated the dropdown for assigning an affiliate to a case so that affiliates filter into the list automatically, rather than showing one day later.