Cycle 4 (03/27 - 04/21) Change Log

BT Tech 🤖 Team Summary:

- 16 💡 Features Added
- 10 🪲 Bugs Squashed
- Some Highlights:
    - Added a new form for creating childcare searches, a page for all childcare searches where researchers can claim searches, and a profile page for each search. Nearby childcare centers will automatically pull onto the profile page for the childcare center.
    - Added automatic emails to worklife vendors and clients when a client is referred to a worklife vendor.
    - Updated QA survey to gather more information on the client's experience.

Feature Improvements/Additions:

- Added a new form for creating childcare searches, a page for all childcare searches where researchers can claim searches, and a profile page for each search.
- Updated QA survey to gather more information on the client's experience.
    - See sample of QA Survey here: https://app.getguru.com/card/cMgM46Li/QUALITY-ASSURANCE
- Added automatic emails to worklife vendors and intakes when a client is referred to a worklife vendor.
- Updated emails to clients placed with an affiliate to include the modality of the session, and whether the client should reach out to the affiliate.
- Added emergency contacts on intakes. A field for name and contact information will show on all cases with a counselor as the case manager.
- Replaced times available and times unavailable on affiliate placement form with free form box for time restrictions.
- Added ability for users to schedule clients with CC counselors by opening the scheduling tool and clicking on their name.
- Added rate with worklife vendor information on rightside of case.
- Added automated weekly email to Laura and Meg about manager consults that have been open for more than two months.
- Added "OWL" as a referral source for Harvard clients. This includes Harvard Postdocs, etc.

- Switched order of tables on Account Manager dashboards so that the table of upcoming renewals comes before the table of all clients. Also added the ability to download the tables in csv form.
- Removed client ID from billing invoices to affiliates.
- Removed calendly view of all counselor’s availability.
- Added the timestamp of when a banner was created to intakes and manager consults.
- Gave researchers the ability to view intake and manager consult banners. Added Carey and Kristin on manager consult banners.
- Added the ability to select Lex as a case manager on worklife cases.

Bug Fixes:

- Fixed 500 error occurring on cases with an address and no state.
- Fixed issue where arrows to toggle between weeks in the CC calendar would disappear.
- Updated CC calendar so that users can only see their own availability 31 days into the future.
- Updated redirect on /notes to go to /notes_search.
- Fixed issue that was preventing service approvals and sessions from being created when Amy was assigned to cases. Amy also wasn’t being set as the counselor, and clients were not showing in her table of clients.
- Fixed typo on utilization reports: “Where you referred…” to “Were you referred…”
- Added childcare search template on life services intakes.
- Updated emails to BCH clients placed with Amy Kizirian to include the correct location of the session.
- Fixed 500 errors occurring on affiliate profiles from listed availability.
- Stopped all referred to options from becoming selected when closing a case.