Cycle 6 (05/22 - 06/12) Change Log

BT Tech 🤖 Team Summary:

- 16 💡 Features Added
- 8 🪲 Bugs Squashed
- Some Highlights:
  - Updated notes on organizations to collect more information, including: the who, how, and what of the contact and how much time was spent on the note. Added the ability to pin notes to the top of the list on an organization.
  - Added background check on counselor's availability. Unavailable counselors are then automatically removed from the CC calendar.
  - Updated group practices so that the actions are more intuitive and reliable.

Feature Improvements/Additions:

- Updated group practices. Changes include:
  - Reorganized actions to make editing clinicians more intuitive.
  - Made it possible to delete offices with the same address from multiple clinicians.
  - Added button to remove a clinician from a group practice.
  - Fixed bug that was causing the admin user to automatically move to new clinicians on the group practice.
- Updated notes on organizations to collect more information, such as the who, how, and what of the contact and how long the activity associated with the note took. Added the ability to pin notes to the top of the list of notes on the organization.
- Added background check on counselor's availability. Unavailable counselors are then automatically removed from the CC calendar.
- Updated organization audit process so that Meg receives an email with all overdue audits and audit tasks are assigned by Meg. Also added contract plan to audit.
- Created email alert for Peter when there's a new manager consult. Also added Peter onto alert for CISD events.
- Added custom email for clients scheduled with Simple Will. Made it possible to add a scheduling link to worklife vendor profiles.
- Made further updates to the childcare search process.
  - Searches for intakes are now due in 5 days, and searches for life services intakes are due in 3 days.
  - Added ability to reassign childcare searches.
  - Fixed formatting on childcare notes. Made it possible to add hours of availability when creating a child care from a formatted note.

- Added whether a counselor has virtual or in-person sessions to their profile on the CC calendar.
- Added Nova as an insurance option on intakes.
- Added button for Nicole Dipentima to access her cases from her home page.
- Made it required to indicate whether a canned response should show on intakes or consults.
- Added preferred name onto client profiles.
- Removed “baby kit” from tracking label on life services clients.
- Added CID balance to organization details on intakes and manager consults.
- Updated the sender of emails regarding missing documents and profile details to be affiliaterelations@kgreer.com.
- Removed users ability to schedule NEPC clients with Heidi K.

Bug Fixes:

- Removed duplicate monthly account review email.
- Fixed bug that was causing tasks for the counselor to create twice when a client is referred to the CC.
- Fixed error that was preventing organization audits from going out. The error was in creating a task for the audit.
- Fixed bug that was causing invoices to Beth to go out with Tina’s name.
- Fixed error message occurring on qa surveys to clients who had no referrals.
- Fixed 500 error occurring on organizations with no quickbooks ID
- Updated QA surveys so that yes and no are saved as 1 and 0, and emails to managers with results have yes/no instead of 1/0.
- Fixed javascript error that was preventing affiliate score form from closing.