



Cycle 7 (06/19/2023 - 07/10/2023) Change Log

BT Tech Team Summary:

- 7  Features Added
- 4  Bugs Squashed
- Some Highlights:
 - Added filtering on organization notes. Users can filter by the author of the note, who at the client organization is involved with the note, and what the note is about.
 - Improved the process of categorizing events for program engagement reports. Dropdowns are arranged in the order in which they should be filled out, and will appear only when it is necessary that the dropdown is filled out.
 - Added the ability to customize insurance options in BT.

Feature Improvements/Additions:

- Added filtering on organization notes. Users can filter by the author of the note, who at the client organization is involved with the note, and what the note is about.
- Added automatic categorizing of notes that come in through bcc-ing Big Top on emails to contacts.
- Improved the process of categorizing events for program engagement reports. Dropdowns are arranged in the order in which they should be filled out, and will appear only when it is necessary that the dropdown is filled out.
- Updated the childcare research portal for lifeservices clients. Removed all logos from the header and updated the disclaimer in the footer.
 - Only clients with MINES, Perspectives, and Concern as their EAP will have a disclaimer: "Neither [Life Service Company Name] nor KGA endorses or sanctions any particular service. Please understand that our reports are researched based on the guidelines you give us. The results should be considered referrals, not recommendations. If you need further guidance on your options or wish to expand the criteria, don't hesitate to reach out."
- Added ability to update insurance options through BT.
- Added Kristin on counseling productivity reports, and added a column indicating how many referrals to the CC each counselor made per week.
- Updated how multiple scheduling links for CC counselors display on cases.

Bug Fixes:

- Updated due dates on childcare searches to be five or three business days out. This resolves an issue where childcare searches would sometimes be due over weekends.
- Removed limit that was causing only the first 200 childcare centers to show on the childcare index page.
- Fixed spelling error on nutrition consult confirmation email to clients. Removed the nutrition intake form.
- Gave lifeservices case managers access to all intake types in Big Top.