Cycle 8 (07/17/2023 - 08/07/2023) Change Log

BT Tech 🤖 Team Summary:

- 14 💡 Features Added
- 4 🪲 Bugs Squashed
- Some Highlights:
    - Separated worklife tasks into their own forms. This will simplify the process of assigning tasks to the Research Team.
    - Added the ability to assign a group practice to a case. This will send an automated email to the client and close the affiliate placement on the case.
    - Fixed error that was preventing client emails from populating in the CC scheduling system.

Feature Improvements/Additions:

- Separated out worklife tasks into their own forms.
- Added ability to create a meeting from Big Top's top menu-bar.
- Added prompt to input fax number when an affiliate indicates that they would like to receive paperwork via fax.
- Added the ability to assign a group practice to a case. This will send an automated email to the client and close the affiliate placement on the case.
- Added the ability to hide group practice clinicians from affiliate placements.
- Added new information to Account Manager dashboards including: start and end dates of contracts, names of primary contacts, and last audit dates.
- Updated organization audit process so that it's due in thirty days, and an automated reminder goes out after twenty one days.
- Added ability to update the default worklife case manager from Ronny's Corner.
- Added category and series to event display pages.
- Added units paid to the affiliate section on intake pages.
- Updated BT so that the primary email or phone number is always used when available. If there's no primary email or phone number, the contact info that was inputted first will be used.
- Added custom email to clients who are referred to BALANCE.
- Added monthly report to counseling supervisors on referral choices that the team made that month.
- Updated formatted notes for the childcare research portal. None of the fields are required when creating a new child care center from a note, and users can now add a research tag on a new unformatted note.

Bug Fixes:

- Fixed error that was preventing client emails from populating in CC scheduling tool.
- Fixed bug preventing referral emails to UBS from being sent.
- Removed broken link to view invoices on work life vendor and user service approvals.
- Fixed styling on affiliate profile pages so that all boxes on the right side are the same size.