Cycle 1 (01/01/2024 - 01/22/2024) Change Log

BT Tech 🤖 Team Summary:

- 19 💡 Features Added
- 14 🪲 Bugs Squashed
- Some Highlights:
  - Prepared the autosend of annual program engagement reports to clients. Updated formatting on the report, and added a new section dedicated to the improvement of client symptoms.
  - Added a brokers section to organizations where users can indicate which permissions brokers should have related to that organization.
  - Added pronouns to affiliates, providers, and vendors. Pronouns will display next to the name on profile pages.

Feature Improvements/Additions:

- Prepared the autosend of annual program engagement reports to clients. Updated formatting on the report, and added a new section dedicated to the improvement of client symptoms.
- Added a brokers section to organizations where users can indicate which permissions brokers should have related to that organization.
- Added pronouns to affiliates, providers, and vendors. Pronouns will display next to the name on profile pages.
- Removed the “Reporting Category” dropdown from cases for household members.
- Added an alert for when the “Faculty” field is blank when closing an intake.
- Added alert under “Likely Next Steps” on an intake that will show if the client has access to Dartmouth Health’s internal EAP.
- Added the ability to select multiple options under “who”, “how”, and “what” on organization notes.
- Added the ability to indicate the number of books that clients can receive per the number of months on an organization.
- Updated the outcome survey data on utilization reports to include data from all surveys completed in the year, rather than just the surveys completed by clients with an active organization.
- Added the color blue as an option on intake textboxes.
- Added organization note categorizing and filtering to event notes.
- Added the full name of clients to worklife vendor authorization forms. Updated referral emails to clients and vendors so that they are sent by the case manager.

- Removed “Internal Case Issues” and “Case Acuity” from the case closing form.
- Added a checkbox to affiliate profiles for interest in receiving mandatory referrals.
- Made it possible to send the outcome survey to clients before filling out an intake.
- Added snowflakes to the login screen for Big Top. Made seasonal changes to the login screen automatic.
- Added an automatic alert to the counseling assistants when an affiliate who has requested paperwork via fax does not have a fax number on their profile.
- Updated the “in-person” option on affiliate placements and provider searches to request more information on why the client is requesting this option.
- Updated productivity reports to go out on Mondays, include Monday - Friday of the previous week, and to pull intakes that were written in that week.

Bug Fixes:

- Fixed bug that was preventing users from editing meeting and event notes.
- Fixed styling issues on progress notes.
- Removed fields that are no longer relevant from client pages.
- Fixed the display of bookshelf policies on client, manager consult, and organization pages.
- Fixed the bug that was preventing forms under Likely Next Steps from opening.
- Fixed the issue that was causing double- spacing on textboxes.
- Fixed the issue that was causing forms on intakes to reset after closing and reopening them.
- Removed the word “EAP” from QA survey results.
- Fixed the bug that was causing intake details to become blank when saving an intake.
- Updated the subject line on program engagement reports to say “annual” instead of “semi-annual”.
- Fixed the bug that was preventing the alert of a rate change from going to worklife vendors.
- Fixed the bug that was preventing organization notes from loading.
- Fixed the bug that was sometimes preventing the outcome survey from sending.
- Fixed the bug that was preventing the automatic creation of contact notes from email.