Cycle 11 (10/07/2024 - 10/27/2024) Change Log

BT Tech 🤖 Team Summary:

- 28💡Features Added
- 10 🪲 Bugs Squashed
- Some Highlights:
    - Redesigned the Affiliate Portal using styles from the platform.
    - Updated the CC calendar so that counselors can book clients with themselves 90 days into the future.
    - Added the ability to send the outcome and QA survey together. The outcome questions will show on top of the QA survey.

Feature Improvements/Additions:

- Updates to the outcome survey:
    - Added the ability to send the outcome followup survey with the QA. The outcome questions will show on top of the QA survey.
    - Made it possible for anybody to send the outcome survey, regardless of team.
    - Updated when the followup automatically goes out: 1 week after closing or 2 weeks after the initial survey was completed, whichever comes first.
    - Added all outcome survey answers to the progress note record.
- Redesigned the Affiliate Portal using styles from the platform.
- Added USP rules to contract details on organization profiles.
- Updated organization audits so that account managers receive a number of audits relative to the number of clients they manage. All account managers will receive the number necessary to audit each of their accounts within six months.
- Added a page to the Management section of Big Top where sessions can be filtered by date and counselor.
- Attachments on emails to clients and contacts will now save on the intake or consult.
- Added an alert to the Affiliate Relations team when an affiliate checks off a credential issue.
- Added the note created when reopening an affiliate placement to the top of the placement details.
- Added the industry associated with contacts to the page of references.
- Moved billing on events above the feedback and summary sections so that it is easier to see.
- Added intake documents to provider searches.
- Added the ID associated with the task to “My Tasks”.

- Added the ability for group practice administrators to indicate their clinicians' availability on the Affiliate Calendar.
- Added a record of rate changes on affiliate profiles. The date that the rate was changed and who made the change will now display on the profile to admin users.
- Updated referrals to affiliates so that they are sent by the person who assigned the affiliate rather than the case manager.
- Removed "Service Type" from the form to close cases.
- Added client insurance plan name to affiliate placements, provider searches, and medical/dental searches.
- Sorted lists of insurances across Big Top.
- Updated the CC calendar so that counselors can book clients with themselves 90 days into the future.
- Added an automatic receivable to crisis response events when the organization is out of crisis hours and their flexible resource budget.
- Switched the order of columns on the table of active EAP clients on account manager dashboards.
- Updated the creation of affiliates that belong to a group practice so that a quickbooks profile is automatically generated when they should receive their own billing paperwork.
- Made the user that refers a client to a worklife vendor the sender on worklife vendor referrals.
- Sorted the dropdown for benefit referrals on case closing.
- Added tasks to worklife vendor profiles.
- Added a note indicating that a worklife vendor is unavailable when assigning to a case.
- Added the ability to search through counseling sessions by date, counselor, and whether the session was canceled.
- Prevented organization audits from being assigned to the email address for small business clients.

Bug Fixes:

- Fixed 500 errors being caused by vendors adding feedback to events.
- Added the button for creating new USP rules back onto the page of USP rules.
- Removed Harvard's directory from cases because the directory is now inaccessible without a Harvard login.
- Removed contacts for inactive organizations from the page of poster contacts.
- Fixed the ability to edit documents.
- Fixed the error that was preventing the contract section from showing on organization profiles without active contracts.
- Fixed the error that was causing a 500 error on the page of upcoming benefits fairs.

- Removed the table of manager consult QA questions from program engagement reports.
- Made it possible to download more than one page of child care search results at a time on the child care search search page.
- Removed old KGA employees from all lists of KGA employees in Big Top.