Cycle 2 (01/29/2024 - 02/19/2024) Change Log

BT Tech 🤖 Team Summary:

- 15 💡 Features Added
- 2 🪲 Bugs Squashed
- Some Highlights:
    - Updated the quality assurance survey for manager consults. Contacts will be asked questions specific to the type of consultation that was provided.
    - Added the ability to manually create and cancel CC sessions. Users will also be able to attach progress notes to sessions.
    - Began work on the worklife resources portal. Users now have the ability to record information on worklife resources in Big Top.

Feature Improvements/Additions:

- Updated the quality assurance survey for manager consults.
- Added banners for CID requests. CID requests will be assigned to the counseling assistants and they will be able to claim the request from the affiliate placements page.
- Added a portal for worklife resources. Users now have the ability to record information on worklife resources in Big Top.
- Added the ability to manually create and cancel CC sessions. Users will also be able to attach progress notes to sessions.
- Added a "read-only" copy of the CC calendar that can be used to see which available sessions haven't been claimed.
- Updated contact permissions to more clearly indicate the contact's responsibilities.
- Removed non applicable fields from broker contact profile pages.
- Added a url for account manager dashboards. Heidi L. is now on the counseling team and she is automatically directed to the counseling dashboard, so she can use this new url to access information related to her account management work.
- Added the number of CC sessions offered, used, and canceled by counselors to the weekly productivity report.
- Added the ability to send utilization reports only to brokers.
- Updated the formatting on past intakes saved as progress notes.
- Added the ability to hyperlink text in Big Top notes.
- Updated the order of counseling interventions.
- Updated the headers on utilization report event tables. The headers now indicate whether the events are client-specific or all client in parenthesis.
- Added Care.com as a likely next step on MIT, Broad, and Harvard eldercare cases.

- Removed all counseling interventions except for provider searches as a likely next step for cases with no session model.

Bug Fixes:

- Fixed the issue that was preventing affiliate rates from being updated.
- Fixed the issue that was preventing insurance plan names from being updated.