Cycle 3 (02/26/2024 - 03/18/2024) Change Log

BT Tech 🤖 Team Summary:

- 22 💡 Features Added
- 14 🪲 Bugs Squashed
- Some Highlights:
  - Improved David Smith's calendar so that it's much easier to schedule with him and change his availability.
  - Added the ability to access worklife resources in Big Top. Applied feedback from the research team in order to make the portal usable.
  - Added a section to intakes where case managers can communicate client session goals to CC counselors.

Feature Improvements/Additions:

- Improved David Smith's calendar so that it's much easier to schedule with him and change his availability.
- Added the ability to access worklife resources in Big Top. Applied feedback from the research team in order to make the portal usable.
- Added additional recommended interventions to intakes:
  - Case managers will be notified if the client is eligible for sessions with Amy or Nicole.
  - A reminder to refer the client to Empathia will show for Analog clients based in California.
  - The process for connecting a client with EndeavorOTC will show for clients with ADHD.
  - A reminder to review worklife webinars will show if the client has worklife issues selected in their case.
- On childcare searches, users will now be able to view nearby (within 20 miles) open and recently completed childcare searches.
- On provider searches, nearby open and recently completed provider searches will now be filtered to match the provider search type. For example, prescriber searches will only show nearby and recently completed prescriber searches.
- Added a section to intakes where case managers can communicate client session goals to CC counselors.
- Made it possible to add intake sessions administered by users outside of the CC.

- Applied further feedback to contact permissions. Created a section specifically for partner designations, alphabetized checkboxes, renamed “Utilization Report” to say “Program Engagement Report”, and updated section labels to be more clear.
- Updated the “Missing Documents” page for clinicians. Deactivated clinicians and clinicians who are not missing documents have been removed from the page.
- Updated the “Poster Contact” page to include the most updated poster contact designations. Excluded electronic poster recipients and inactive contacts.
- Added an email alert to account managers that will go out when an event is created for their organization. This alert will not go out if they were the creator of the event.
- Added an email alert to event managers that will go out when participants are added on an event that they managed.
- Added the ability to filter affiliates based on state licensure on affiliate placements.
- Updated affiliate information on affiliate placements to include the date of the last intake worked with, and to exclude phone numbers.
- Added an open text field for indicating public transportation options on provider profiles.
- Added a reminder email to clients when they do not complete the post-outcome survey. Also updated some of the language in the survey emails.
- Added the ability to mark vendors as unavailable. Unavailability can be added with an expiration date and a note.
- Added “Read More” buttons to manager consults listed on organizations.
- Added a link to Heidi Lively’s account manager dashboard.
- Added the ability to search for affiliates by their preferred name.
- Made it possible for everybody who backs up reception to see banners. Added access method to banners.
- Added the ability to indicate the open enrollment month on organizations.

Bug Fixes:

- Fixed organization audits so that each month, account managers will receive audits for organizations that went the longest without being audited.
- Fixed the bug that was causing the wrong session on a case to be updated.
- Fixed the bug that was preventing provider search research notes from saving without a practice name.
- Fixed the bug that was preventing users from indicating partners and key partners.
- Removed deactivated contacts from the table of partners and key partners on an organization.
- Fixed the broken link in the completed manager consult qa alert that goes to managers.

- Fixed the issue that was preventing a full menu of options from showing when right clicking in a Big Top textbox. Instead of the default browser options, a menu with just “Link” would show.
- Fixed the bug that was causing this page: https://clients.kgreer.com/financial_dashboard to throw a 500 error.
- Fixed bug that was removing “Session” from the “What” dropdown when editing progress notes.
- Fixed bug that was preventing deactivated group practices from showing crossed out in the Big Top search bar.
- Fixed bug that was preventing certain files from being emailed out of Big Top.
- Fixed bug that was occasionally preventing the outcome survey followup from being sent out.
- Fixed broken links to CIR manager consults on the list of open CIRs. Also relabeled many instances of “CISD” or “CID” to “CIR”, and auto filled CIR searches with information on the CIR.
- Updated the categorization of organization notes to include “Partner” and “Key Partner” as options instead of “Primary Contact” and “Secondary Contact”.