Cycle 4 (03/25/2024 - 04/15/2024) Change Log

BT Tech 🤖 Team Summary:

- 21 💡 Features Added
- 14 🪲 Bugs Squashed
- Some Highlights:
  - Updated the form for creating and editing an event to more intuitively follow the process of setting up an event.
  - Added the ability to send a calendar invite from an event.
  - Rearranged program engagement reports.

Feature Improvements/Additions:

- Updated the form for creating and editing an event to more intuitively follow the process of setting up an event.
- Added the ability to send a calendar invite from an event.
- Rearranged program engagement reports:
  - Moved "Use of Counseling Sessions" into the "Support for Emotional / Mental Health" section on the 4th page.
  - Moved "Clinical Outcomes" into the "Support for Emotional / Mental Health" section on the 4th page.
  - Removed the word "Brightline" from the report. Instead, it's just listed as "Pediatric Counselor"
  - Removed Brightline/Pediatric Counselor from the "Days to Connect with Available Counseling Resource" section.
  - Removed the percent of headcount for platform activities. (Page 5 and 6)
- Added organization benefit information to manager consults.
- Added the ability to create a Lay-off Support event from manager consults.
- Updated the template for mandatory referral notes to include a prompt about plans to address noncompliance.
- Updated the list of case managers to include all admins except for Account Managers.
- Simplified Harvard's page for creating a program engagement report.
- Added the new Worklife Research Portal to life services intakes.
- Updated warning messages when closing a case to include better information on why the case won't close.
- Added a section to affiliate placements and provider searches where case managers can upload a client's insurance card.
- Added "Unknown" and "Not a Client" as organization options for clients.

- Added a page for searching events.
- Updated research notes to be consistently formatted the same way.
- Added the ability to assign ASAP as a worklife vendor on cases.
- Updated the manager portal to have more relevant productivity stats.
- Added the ability to select multiple provider types from a dropdown list on provider profiles.
- Added automated task reminders that will go out when an event is closed. One reminder will go to account managers to bill the client, and one reminder will go to the event manager to look for a participant count.
- Added an icon indication that a progress note has been edited.
- Updated the “Research Portal” to be labeled the “WL Research Portal” across BT.
- Removed custom emails and relationship types for Stamford Police cases.

Bug Fixes:

- Added the ability to sort affiliates by the last date they saw an intake on affiliate placements.
- Fixed formatting on providers created by web scraping psychology today.
- Fixed bug that was preventing David Smith from creating notes.
- Fixed bug that was preventing users from authorizing additional sessions on a service approval.
- Fixed bug that was causing the outdated version of David Smith’s calendar to show on intakes.
- Fixed bug that was causing many, many outcome surveys to go out to clients.
- Fixed bug that was preventing sessions from being created.
- Fixed confirmations for meetings with David Smith to include the client’s full name.
- Updated email to client with new resources to correctly label the resources type.
- Fixed bug that was causing two audits to be created per organization being audited.
- Fixed bug that was removing all interventions from cases that don’t get sessions, rather than just the counseling interventions.
- Added the ability to update an organization’s bookshelf policy expiration date whenever that field is not blank.
- Fixed bug that was preventing Talkspace from showing green when the client has Health Plans Inc insurance.
- Fixed the bug that was preventing fields for date and time from popping out for worklife vendors with scheduling links.