Cycle 6 (05/20/2024 - 06/09/2024) Change Log

BT Tech 🤖 Team Summary:

- 20 💡 Features Added
- 6 🐞 Bugs Squashed
- Some Highlights:
  - Added the ability to link clients based on relationships. The relationship options are: "'Guardian/Minor", "Spouse/Partner", and "Same Person".
  - Updated the form for benefits fairs materials on events. Added a page with all upcoming benefits fairs and the status of associated materials.
  - Added the ability to link an organization to multiple broker representatives.

Feature Improvements/Additions:

- Added the ability to link an organization to multiple broker representatives. The broker representatives can have different responsibilities for the different organizations that they represent.
- Added the ability to link clients based on relationships. The relationship options are: "'Guardian/Minor", "Spouse/Partner", and "Same Person".
- Updated the form for benefits fairs materials on events. Added a page with all upcoming benefits fairs and the status of associated materials.
- Added the ability to edit the first address listed on a childcare search.
- Updated the email address listed in email referrals for CLC- Simple Will. The email address is: freeWills@clcadvantage.com.
- Added the preferred name of clients and affiliates to the side of cases.
- Added organization banners to the top of the form for completing an intake.
- Added accessed books to the program engagement reports for organizations that receive free books.
- Added sessions to affiliate service approvals. This will allow us to better track the individual sessions that an affiliate completed with a client.
- Added the ability to mark worklife vendors temporarily unavailable. Unavailable worklife vendors will show "locked" on an intake.
- Updated email signatures in Big Top to include: "Emails are generally responded to within 2 business days. If your situation requires immediate attention please call 800-648-9557 for support 24/7".
- Added early and excused CC cancellations to the Counseling Weekly Productivity Report.
- Added affiliate placements completed to Big Top's Productivity Report.

- Added the state where an organization is headquartered to the list of all active organizations.
- Added Erin and Stacey to the Worklife Weekly Productivity Report and Today's Activity.
- Added the mileage reimbursement rate to all fields for mileage reimbursement. The rate is: $0.67 per mile.
- Separated "Mandatory" and "SAP" as different consult types on a manager consult.
- Added "Sales" as an option under "What" on organization notes.
- Added a custom referral email to clients who are referred to Brad Hansen.
- Changed all instances of "clinician" to "affiliate" across Big Top.

Bug Fixes:
- Fixed the bug that was causing descriptions entered by reception to duplicate every time the case manager was changed on a case.
- Fixed bug that was preventing smaller files from attaching to emails.
- Fixed bug that was preventing the scheduling links for a worklife vendor from showing.
- Fixed the ability to add client insurance cards to affiliate placements.
- Removed deactivated affiliates from the map of nearby affiliates on affiliate placements.
- Fixed bug that was preventing CIR banners from showing.