Cycle 10 (09/22/2025-10/21/2025) Change Log

BT Tech 🤖 Team Summary:

- 16 💡 Features Added
- 8 🪲 Bugs Squashed
- Some Highlights:
    - Redesigned the form for entering contracts and made it easier to input utilization sensitive pricing. Made it easier to compare contracts and group contracts by agreement.
    - Updated the process for creating and approving payables. Payables will be created once an event is complete and will become approvable only after the event has a headcount.
    - Updated email attachments to attach to emails as links to the platform.

Feature Improvements/Additions:

- Redesigned the form for entering contracts and made it easier to input utilization sensitive pricing. Made it easier to compare contracts and group contracts by agreement.
- Updated an affiliate's view of paid bills to include all paid bills rather than only 25 of them.
- Added the history of who last updated the rate and when to a worklife vendor's profile.
- Updated affiliate portal invitations to be sent by billing@kgreer.com rather than info@kgreer.com.
- Updated the wording in headcount request emails to event vendors.
- Added a task for account managers to headcount change alerts.
- Updated the process for creating and approving payables. Payables will be created once an event is complete and will become approvable only after the event has a headcount.
- Added an alert to Tyson, Hannah, Liv when there are less than ten endeavor OTC codes left.
- Updated email attachments to attach to emails as links to the platform.
- Added date of last intake and a compilation of billing invoices to group practice pages.
- Added a column with total monthly intakes completed to the review of counselor referrals that managers receive each month.
- Relabeled the "Referred to" field to be "Benefits referred to" on intakes.
- Added a revenue matrix that displays billing schedules for active EAP contracts. The matrix shows monthly revenue forecasts by client, including billing dates, periods, and amounts.

- Added a page where users can view the impact of events on utilization by organization.
- Updated contacts so that the responsibilities of partners are editable, and there is a "No CRC" access option.
- Updated the organization audit reminder to go to Kristin and Carey.

Bug Fixes:

- Fixed the bug that was preventing all company reports from generating.
- Fixed the bug that was preventing a task from being created for Anna when an affiliate receives feedback. Also added a link to the intake in the feedback.
- Fixed the bug that was preventing users from creating CIR events from manager consults.
- Fixed the bug that was allowing users to create blank headcounts on organizations.
- Fixed the bug that was causing issues with matching online intakes with existing client profiles via phone.
- Fixed bug that was preventing emails from sending to users with commas in their last name.
- Fixed the bug that was causing some phone calls to be missing from cases.
- Fixed the bug that was causing contact pages to become inaccessible when the contact's email caused a Mailchimp error.