Cycle 4 (03/24/2025 - 04/20/2025) Change Log

BT Tech 🤖 Team Summary:

- 16 💡 Features Added
- 5 🪲 Bugs Squashed
- Some Highlights:
    - Care Navigator: intakes can now be initiated by clients on the platform and sent to Big Top.
    - Made further improvements to vendor pages.
    - Removed “Affecting Work?” and “Documented Job Performance Issues” from intakes.

Feature Improvements/Additions:

- Launched Care Navigator. Intakes can be initiated on the platform by clients and then sent to Big Top. The ops team can assign these intakes to case managers from this page: https://clients.kgreer.com/intakes/online_intakes.
- Made further improvements to vendor pages, including:
    - Added the ability to indicate whether a vendor, affiliate, or worklife vendor consented to text messages.
    - Added a “wellness” checkbox to vendors.
    - Added a “travel details” text box to vendors.
    - Added an “Allows session recording checkbox” to vendors.
    - Added when a vendor was created to their profile.
    - Made documents on vendor profiles only visible to KGA employees.
    - Made it possible for KGA employees to see who last updated a vendor’s rate and when on vendor profiles.
- Added a pop up with the form to input CC goals after placing with the CC from an intake.
- Added reporting category to manager consults.
- Added a report on case audits to the management section.
- Updated referral emails related to nutrition consultations.
- Alphabetized the dropdown of cases accessible from the top menu bar.
- Added “DH Internal EAP” as a dropdown option under “Referral from” for Dartmouth Health intakes.
- Made benefit type required when adding or editing benefits on an organization.
- Updated emails to affiliates from cases so that records show under progress notes rather than research notes.
- Restored the global search page and added group practices.

- Added “N/A” as an option on case audits.
- Updated affiliate and vendor pages so that notifications bring users to the top of the page.
- Updated intake writer and intake written at to be based on the intervention and plan textbox on intakes.
- Removed the word “affiliate” from affiliate referral emails to clients.
- Removed “Affecting Work?” and “Documented Job Performance Issues” from intakes.

Bug Fixes:

- Fixed the issue that was causing too many organization audits to be assigned to account managers each month.
- Fixed the credential dropdown on affiliates so that "Licensed Psychologist" is one option.
- Fixed the bug that was causing affiliate placements and provider searches to be created with code under “Language”.
- Fixed the bug that was preventing bills from being sent to QuickBooks.
- Fixed misspelling of dietitian on nutrition referrals.