Cycle 7 (06/30/2025-07/25/2025) Change Log

BT Tech 🤖 Team Summary:

- 31 💡 Features Added
- 16 🪲 Bugs Squashed
- Some Highlights:
    - Began work on the worklife vendor portal. Worklife vendors were given the ability to log in, dashboards were created, and profiles were styled to be consistent with affiliate profiles.
    - Fixed duplicate online intakes. Now, additional intakes filled out on the platform will automatically merge with existing open intakes.
    - Redesigned life services intakes to be consistent with regular intakes.

Feature Improvements/Additions:

- Began work on the worklife vendor portal. Worklife vendors were given the ability to log in, dashboards were created, and profiles were styled to be consistent with affiliate profiles.
- Updated online intake notes to include the questions exactly as the client saw them.
- Added relationship, intake writer, and intake written at as searchable fields on intake advanced search.
- Added benefit information to affiliate placements and provider searches.
- Added an alert to CSAC affiliate placements to make sure that affiliates do not have a connection with CSAC.
- Added an automatic renewal alert to small business clients 60 days ahead of renewal.
- Updated the “New Intake”button to also wipe the plan in addition to the identifying information and assessment.
- Updated the view of combined tasks to include everyone working on affiliate placements or searches, regardless of team.
- Updated contract billing frequencies to include “Stripe”.
- Added the intake date to the dropdown for connecting intakes. This will make it easier to ensure that the correct intake is being connected.
- Added an alert for online intakes that were unable to book a counseling session at their preferred time.
- Redesigned life services intakes to be consistent with regular intakes.
- Updated online intakes to save whether the client is part time when applicable.
- Add online intake affiliate requests and how many mental health online intakes requested the CC to monthly referral reports.

- Updated the CC calendar to display 6:30 a.m. sessions in their entirety.
- Added locations to organization audit emails.
- Updated the consent to onsite placement for RRMC clients to say, “Does this individual consent to placement (onsite OR virtual) at Rutland Regional Behavioral Health?”
- Updated all lead forms to include submission date and estimated headcount.
- Updated child care searches so that notes specific to the center save to the child care center, and search details save under task details.
- Added the email resources were sent to on progress note confirmations.
- Resorted provider searches so that unclaimed searches will show at the top of the list.
- Added the date a contact was created to contact profiles.
- Updated the glossary for manager consults to include a definition for complaints.
- Updated the expiration date on account manager dashboards to reflect the expiration of an organization’s last contract.
- Removed the “Cancel CAW” button from worklife searches.
- Added the ability to filter affiliates by profile creation date.
- Rearranged fields on intakes.
- Rearranged affiliate phone numbers so that the primary phone number will be listed first.
- Added a created at time stamp and created by record to manager consults.
- Relabeled the outcome survey to “pre-screening” and “post-screening” across Big Top.
- Added a progress note with the contact information an online intake submitted.

Bug Fixes:

- Fixed typos and data errors on program engagement reports.
- Fixed duplicate online intakes. Now, additional intakes filled out on the platform will automatically merge with existing open intakes.
- Updated the small business set up to automatically set the organization type to “Company”.
- Updated the CC goals pop up to not pop up when the CC counselor is scheduling a client.
- Fixed the bug that was causing duplicate phone numbers to save to online intakes.
- Fixed the bug that was causing online intakes to be incorrectly placed with Lauren.
- Fixed the bug that was preventing ROIs and other signed documents from saving to intakes.
- Fixed bug that was breaking Today’s Intakes when a life services intake didn’t have a case manager.
- Fixed bug that was causing updated affiliate profiles to incorrectly alert about missing documents.
- Fixed bug that was overwriting “Household Member” under location on intakes.

- Updated weekly productivity reports to exclude intakes without case managers.
- Updated life services intakes so that they show whether they're overdue in the list of intakes.
- Removed organization audits for small business organizations.
- Fixed the styling of contract edit forms.
- On worklife tasks, disabled the "Save changes" button after submission.
- Fixed the bug that was preventing CC counselors from being tasked on online intakes.