Cycle 9 (08/25/2025-09/23/2025) Change Log

BT Tech 🤖 Team Summary:

- 19 💡 Features Added
- 14 🪲 Bugs Squashed
- Some Highlights:
    - Added a new method for 2 factor authentication. Users will now be able to choose to receive codes from SMS messages, phone calls, or authenticator apps.
    - Fixed the bug that was preventing an old intake from saving when adding a new intake to a case.
    - Continued work on the messaging portal for clients and case managers.

Feature Improvements/Additions:

- Added a new method for 2 factor authentication. Users will now be able to choose to receive codes from SMS messages, phone calls, or authenticator apps.
- Added the formal supervisory ROI as paperwork that can be sent to clients through DropBox Sign. The document can also be sent as an attachment on manager consults.
- Added the ability to manually add and detract from contract fields on organizations.
- Updated contacts to only have one CRC level, and made the “Key Partner” designation more obvious.
- Added an indication for when a client organization does not have any utilization sensitive pricing rules.
- Added a view of paid invoices to organizations.
- Removed Megan Anderson as the wellness specialist.
- Updated event payables to automatically create once the event has been completed.
- Added the ability to resend initial research portal emails.
- Added event type headers to the table of client-specific events on program engagement reports.
- Added a disclaimer about payment timelines to the affiliate billing page.
- Automated the end to a bookshelf introductory period. Once the introductory period ends, the bookshelf policy will be automatically updated to be “Referral Only”.
- Added new childcare details to the online intake process.
- Added the phonetic spelling of client names to David Smith’s notes.
- Removed the KGA logo from emails to lifeservices clients.
- Made case number required for closing First Sun cases.
- Added willingness to attend Health Fairs as a field on vendors.
- Added an alert about HUGP to the top of Harvard provider searches.

- Added “other information” as a field on worklife vendor profiles.

Bug Fixes:

- Fixed the bug that was causing “Cases without a task” alerts from going out erroneously.
- Fixed the bug that was causing text formatting dropdown options to appear behind modals.
- Fixed the bug that was preventing custom provider insurances from saving.
- Fixed the bug that was causing payments to worklife vendors to be categorized as counseling payments.
- Fixed the bug that was preventing all company reports from generating.
- Fixed the bug that was causing 500 errors on My Cases when a life services intake didn’t have a case manager.
- Made date required on events. This will fix 500 errors.
- Fixed the bug that was causing the create case dropdown to close when selecting options in the form.
- Fixed the contract form on projects to only include relevant fields.
- Fixed the bug that was preventing some users from assigning TalkSpace.
- Fixed the bug that was causing the “unassigned high priority task” to show after the task had been completed.
- Fixed the bug that was preventing organization audits from going out.
- Fixed the bug that was preventing an old intake from saving when adding a new intake to a case.
- Fixed the bug that was causing “Retry Later” messages.