Cycle 10 (09/11/2023 - 10/02/2023) Change Log

BT Tech 🤖 Team Summary:

- 24 💡 Features Added
- 9 🪲 Bugs Squashed
- Some Highlights:
    - Made further updates to the call queue process:
        - When there is a worklife caller, the phone will now appear purple
        - Descriptions of the caller will now become research notes.
        - When creating a parked call from an intake, there is now an explanation of what a parked call is, and the option to write a description of the caller.
    - Added whether a contact has a Client Resources Center account to their profile.
    - Added preferred name to clinician profiles. When a preferred name is filled out, this name will appear on all communications to and about the clinician.

Feature Improvements/Additions:

- Added whether a contact has a Client Resources Center account to their profile.
- Updated organization notes so that the notes turn red when uncategorized.
- Added the ability to pin research notes.
- Removed urgency level as a dropdown option on life services intakes created by life services partners.
- Made further updates to the call queue process:
    - When there is a worklife caller, the phone will now appear purple.
    - Descriptions of the caller will now become research notes.
    - When creating a parked call from an intake, there is now an explanation of what a parked call is, and the option to write a description of the caller.
- Expanded the top, right search bar so that it is easier to locate.
- Added Canadian provinces to all dropdown lists of states in Big Top.
- Removed the ability to mark an affiliate placement as high priority.
- Added a checkbox to the client creation form that will indicate whether a phone number takes messages. Removed the dropdown for phone type.
- Removed the dropdown of options for closing notes on cases referred to the Counseling Center.
- Added the number of notes and tasks on an organization's profile page.
- Added preferred name to clinician profiles. When a preferred name is filled out, this name will appear on all communications to and about the clinician.

- Updated the form to create a manager consult from a client's profile page. The form no longer asks for the consult type and now has a place to add a note to the consult.
- Updated referral emails to affiliates so that the client's preferred name is listed.
- Updated the list of client organization ratings. The new ratings include: "Don't Know", "Satisfied", "At Risk", and "Upcoming Termination".
- Added a warning message when closing a worklife case that has no referral to a worklife vendor.
- Added organizations that a broker representative represents to their profile pages.
- Added a short bio section to contact profiles. Hovering over a contact's name on the organization page will display the short bio.
- Updated the display and collection of information related to worklife vendors in Big Top.
    - Added the ability to attach a guru link, short description, addresses, and phones. Added the ability to edit/delete all of these things.
    - Removed the number of referrals and rate from the index page. Added the guru link and a short description.
- Added a textbox for insurance ID number to worklife medical searches.
- Updated child care searches to include budget and made start date an open text field.
- Added Megan Chestna to the email of payables requiring review.
- Made intake documents accessible from affiliate placements.
- Updated emailing from manager consults so that cc'd emails are selectable from a dropdown.

Bug Fixes:

- Fixed bug that was preventing emails from being sent to clients.
- Made it possible to send an existing intake to the call queue.
- Updated service approvals so that they become inactive after being fully paid.
- Added a space between available and unavailable resources in childcare and provider portals.
- Updated QA surveys so that the answers display properly on intakes after the survey is completed.
- Fixed bug that was preventing service approvals from displaying authorization links.
- Fixed bugs related to formatted research notes.
- Restored the ability to send an email from a template on manager consults.
- Updated events so that any event type call pull from an organization's flexible resource budget.