Cycle 2 (01/12/2026-02/10/2026) Change Log

BT Tech 🤖 Team Summary:

- 20💡Features Added
- 14 🪲 Bugs Squashed
- Some Highlights:
  - Updated online intakes so that clients can submit an intake when there's already an open case with no intake completed.
  - Added a FAQ for 2 factor authentication. The FAQ is linked on all 2FA related pages.
  - When duplicating a contract, users will now have the choice to duplicate associated utilization sensitive pricing rules as well.

Feature Improvements/Additions:

- Made category required for wellness events.
- Added the ability to change the case manager on closed cases.
- Updated the form for setting up 2 factor authentication so that country code is automatically set to +1.
- Updated online intakes so that clients can submit an intake when there's already an open case with no intake completed.
- Updated the affiliate portal so that affiliates cannot submit two sessions for the same client on the same day.
- Sorted inactive contacts to the bottom of the list of contacts on an organization.
- Added an email notification to case managers when their case has been audited. Also added a field where supervisors can add freeform feedback.
- Added the ability to access dropbox files from organization pages.
- Simplified the worklife vendor portal to only include two tables of inactive and active clients on the billing page.
- Increased the mileage reimbursement rate to 0.725 across Big Top.
- Relabeled "Alerts" on affiliate profiles to "Notes".
- Updated program engagement reports to include DEI events in the top level count of event participants and filter out blank quality assurance questions.
- Added ability to upload the document contract to a Big Top contract.
- When duplicating a contract, users will now have the choice to duplicate associated utilization sensitive pricing rules as well.
- Added Peter and Anjala to the CC waitlist report.
- Added a FAQ for 2 factor authentication. The FAQ is linked on all 2FA related pages.

- Improved load times on the contacts section on organizations.
- Added a strikethrough to inactive organizations in the global search bar.
- Removed waitlisted affiliate placements from the affiliate placements list.
- On affiliate placements for Washington County Mental Health Services, added a reminder to check if the affiliate has a prior relationship with the organization.

Bug Fixes:

- Fixed the issue that was preventing clinician office addresses from being sent to QuickBooks.
- Fixed the bug that was preventing details and tasks from being created on case call requests from the platform. Also fixed the bug that was creating counseling banners for worklife cases.
- Fixed the bug that was preventing payables from being automatically sent to QuickBooks.
- Fixed the bug that was preventing formatting on research notes.
- Fixed the bug that was preventing the daily task digest from going out.
- Fixed the bug that was causing the incorrect vendor rate to be used on invoices.
- Fixed the bug that was preventing a task from being created when there’s a new message. Also fixed the bug that was causing out of office alerts to stay after the case manager returned to work.
- Fixed the bug that was causing the wrong number of unread messages to show in Big Top.
- Fixed the bug that was preventing very old tasks from showing as overdue under all cases.
- Fixed the bug that was causing CLC’s referral email to go to clients scheduled with David or Jim.
- Fixed the bug that was preventing all company reports from generating.
- Re-added USP rules for contracts to organizations.
- Fixed the bug that was preventing users working on only worklife tasks from showing on the combined tasks page.
- Fixed the bug that was preventing contacts from loading on organization pages.