Cycle 9 (08/14/2023 - 09/04/2023) Change Log

BT Tech 🤖 Team Summary:

- 17 💡 Features Added
- 10 🪲 Bugs Squashed
- Some Highlights:
  - Added call queue for clients who are waiting on hold for a case manager. Case managers and receptionists will see a flashing red phone icon in the top right corner of Big Top, which will navigate to a page of unclaimed cases.
  - Added recurring tasks to organization pages. Users can create tasks that will recur weekly, monthly, quarterly, or yearly from the date that the original task was created. The due date will always be the same amount of days later than the created date.
  - Added templates to notes on manager consults that will autofill the notes with helpful prompts.

Feature Improvements/Additions:

- Added queue for callers waiting on hold. Appropriate users will be notified of the call queue and will be able to claim cases from a page of waiting callers.
- Added service approvals to worklife vendor profiles. Organized service approvals on worklife and affiliate profiles by archived and active approvals.
- Added colorful indicators to manager consults which show whether the consult is open or closed.
- Added the ability to create recurring tasks on organization pages. These tasks can recur weekly, monthly, quarterly, or yearly.
- Added chart to organization pages that shows how the number of cases has changed over time.
- Added templates to notes on manager consults that will autofill the notes with helpful prompts.
- Made further improvements to the organization audit process for account managers. Added open invoices to the audit, removed the outdated list of items from the form to submit the audit, and made the summary editable.
- Updated the automated email to clients placed with an affiliate who prefers for the client to reach out first. Now, the email will reflect whether the client should email or call the affiliate.
- Added alert when Kaiser is selected under Insurance on an intake. The alert says: “Please note that KGA can only locate providers for EAP sessions. If the client would like a long

term option, they must locate a provider through Kaiser. Learn more here: https://app.getguru.com/card/i6BAGyyT/Kaiser-Insurance"

- Added the case number to all referral emails to worklife vendors.
- Made it accessible for anybody to create a manager consult from a client's page.
- Added KGA's policy for late cancellations to sleep consultation client referral emails.
- Added the ability to filter by LGBTQ Allied, LGBTQ Identified, Prescriber, and Credentials on the provider index page.
- Updated PsychologyToday import to include Credentials, Specialities, and Languages. Made it possible to add multiple credentials to a provider's profile.
- Added unavailable counselors back to the side-menu of the counseling center calendar. Unavailable counselors will show grayed out to indicate that they are not currently taking appointments.
- Updated the due date on childcare and provider portal tasks to send resources the same day that the task was created. The task will automatically be marked as high priority.
- Gave affiliates the ability to view the rate they are paid per session on their profiles.

Bug Fixes:

- Fixed bug that was causing 500 errors when opening service approvals for the Counseling Center.
- Updated the process to send a kindle book to a LifeServices client. Instead of directly sending a kindle, an automated email request for a kindle will now go to Tyson.
- Updated service approvals for worklife vendors so that they always reflect the accurate number of approved sessions. Previously, worklife vendors approved for multiple sessions always had only one approved session on their service approval.
- Fixed bug that was preventing users from creating a task from a progress note.
- Fixed incorrectly spelled "Separately" on Tufts utilization page.
- Fixed bug that was causing tasks assigned to the research team to become reassigned to the person editing the task.
- Fixed bug that was preventing confirmation emails from going out to clients placed with a group practice. The bug was caused by group practices not having an administrator.
- Restored Nicole DiPentima's access to cases.
- Restored the ability to create worklife searches from LifeServices intakes.
- Added alerts to prevent blank emails from going to clients.