



Release Notes

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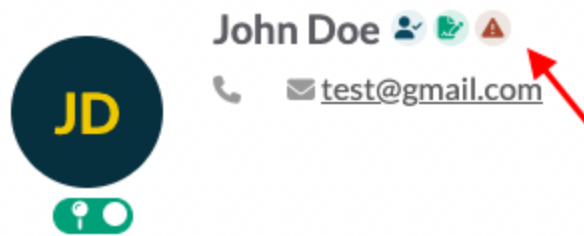
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New functionality and improvements

Participant header flags

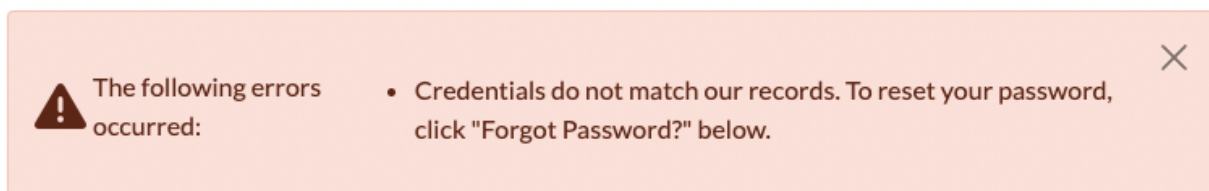
- ❖ If enabled in their instance, professionals with the necessary permissions who navigate to the participant header will now have the ability to add Caution, Restriction, and State and Local Ban flags with a note explaining why the flag has been applied
 - Alongsiders can apply Caution or Restriction flags
 - Location Admins can apply Caution, Restriction, and Local flags
 - Client Admins can apply Caution, Restriction, State and Local flags
- ❖ Once added, a red warning icon will appear by the participant's name
- ❖ Client Admins can remove the flag by clicking Actions and then Remove Flag
- ❖ **Impact:** Professionals will be able to easily see if a participant has been flagged, the name of the professional who added the flag, and the reason why



Sign in error message

- ❖ Participants or professionals who enter an incorrect password when signing in or who don't have an account will see updated error message copy prompting them to reset their password
- ❖ **Impact:** The updated message provides participants with clear next steps if they have trouble logging into their account

Participant Sign In



Account creation and password reset emails

- ❖ Participants and professionals who create an account or reset their password will now see an option to click or copy/paste the Create Password or Reset Password links directly
- ❖ **Impact:** Platform users can now access the links directly instead of relying on hyperlinks which will reduce confusion at this step in the registration and password reset processes

Participant search default state

- ❖ Professionals who navigate to the Customer Search will now see that the default view is to show the first page of participants
- ❖ **Impact:** Professionals can now more quickly identify and take action to support the participant they are searching for

Participants Activity Widget

- ❖ Professionals who navigate to the Participants Activity Widget will now see “Logins”, “Accounts” and “Enrolled” headings above as opposed to below their respective data points
- ❖ **Impact:** Professionals can more easily understand and make decisions based off of the participant activity data

Professional portal font colors

- ❖ Professionals navigating Announcements, Client Document Categories and the Referrals History table will notice black font for copy that was previously a lighter gray
- ❖ **Impact:** Professionals can clearly read all text in those three areas of the professional portal

Bugs addressed

Participant record navigation

- ❖ **Bug:** Professionals who navigated to a participant record were previously seeing pages within the record cut off towards the bottom of the screen
- ❖ **Impact:** Professionals can now navigate to any page within a participant’s record and see the full page without it being cut off

Source system ID

- ❖ **Bug:** Professionals who viewed a participant header previously saw the participant’s source system ID and occasionally location be cut off



- ❖ **Impact:** Professionals can view the entire participant source system ID and location name

