**Minutes of Meeting**

| Date and Time | 02 July 2025 09:00 PST | Meeting type | Zoom |
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| **Organiser** | Mr. Rupesh | **Client** | Citywide |

| Attendees (Internal) |
|---|
| ● Rupesh<br>● Kuldeep<br>● Jaspreet<br>● Sangita |
| **Attendees (Client Side )** |
| ● Tom, Teresa, Matt |

| Agenda |
|---|
| ● **Discussions on the following:**<br>○ Review of ERM tickets from Trello board<br>○ Work History and Auto Logging<br>○ QuickBooks Integration<br>○ Report Approval Workflow<br>○ Call Notes Visibility and Export<br>○ Incident Forms and Call Linking<br>○ Next Meetings |

**The following things are discussed:**

1. **Review of ERM tickets from Trello board:**
    a. **Remark Types and Reasons Alignment (ERM):**
        i. Align remark types (negative, positive, complaint) and reasons (missed reports, attendance) dropdowns.
        ii. Selecting a remark type should automatically filter and display the corresponding reason types.
    b. **Site Linking for Remarks:**
        i. Remarks should be linked to specific sites where they occur.
        ii. A site field should be added to the remarks section to track where

each remark took place.

iii. The site list should be populated based on the assigned agent or provide a full list of sites from the system.

iv. This site information should be displayed in the site comments section, but not be visible in the client portal unless specifically configured to do so.

c. **Qualifications in Site Profile:**

i. A qualification section should be added to the site profile to specify requirements (e.g., armed guards, driver's license).

ii. This section should allow the mapping of qualifications to the guard profile to ensure proper scheduling and assignment of qualified guards.

d. **Remarks History View Page Layout:**

i. The remarks history view page should be updated to display remarks horizontally (instead of vertically) for better readability.

ii. The categories, remark types, and reasons should be aligned in a single line, with the description and posted by fields clearly visible next to each other.

e. **Incident Date Addition to Remarks Form:**

i. An incident date field needs to be added to the remarks form to track when the incident occurred.

ii. This is particularly important for reference in cases like unemployment claims or terminations to provide the correct incident date when reviewing records.

f. **Employee Profile Changes and Automatic Logging:**

i. **Manual Entries** (by Supervisor/Admin) and **Automatic Entries** need to be handled differently in the **ERM** system.

ii. Changes like **pay raises**, **promotions**, **demotions**, and **rank changes** should automatically trigger remarks.

1. Promotion or Rank Increase → Positive Remark
2. Demotion or Rank Decrease → Negative Remark
3. Pay Raise → Positive Remark
4. Pay Cut → Negative Remark

2. **Work History and Auto Logging:**

i. Work history previously shown in the Employee Profile will now be fully integrated into ERM.

ii. All changes (e.g., general info, pay changes, rank changes, etc.) must be logged under the Employee Work History section within ERM.

iii. Important: Changes to general info like birthdays, SSN updates, and contact information need to be logged as generic notes (e.g., "Birthday Updated", "Social Security Updated").

iv. Any significant changes (e.g., **pay raises**, **promotions**, **rank changes**) should automatically create a **remark** with an appropriate title (e.g., **Promotion**, **Pay Raise**).

v. The **remark type** (Positive/Negative) should reflect the nature of the change.

vi. Blacklisting employees from a site should also create a remark with the **reason for blacklisting** (e.g., "Misconduct", "Performance Issues").

vii. When an employee is **blacklisted** from a site, the **reason** must be recorded.

viii. **Blacklist reasons** should be logged under the **ERM remarks** and must be tied to **negative outcomes** (e.g., performance issues).

ix. **Site Transfers** should be treated as a **general entry** with a **site transfer remark**

x. **ERM Profile History** should be visible to both **Admin/Managers** and **Employees**.

xi. Employees should be able to view their **own work history** under **Employee Profile**.

xii. Admins should be able to view **all employees' work history** from the **Admin side**.

xiii. Work history should be **consolidated** into the **ERM** for both **manual** and **automatic entries**.

xiv. **The Employee Work History Section** in the profile should be updated to reflect **ERM history** (including both **manual entries** and **automatic changes** like pay, rank, promotions).

xv. The **ERM Module** should include the **total count of positive, negative, and general remarks** and allow **detailed access** to view violations or any specific employee's history.

xvi. All updates in the **Employee Profile** should automatically be reflected in **ERM**.

xvii. In the **Employee Comments** section of the profile, only **manual remarks** (added by supervisors/admins) should be visible to the employee.

xviii. **Admin/Managers** can see the **full work history** under the **ERM section** including **manual and automatic entries**.

xix. Employees should be able to see their **entire work history**, including all remarks, **positive/negative**, and **general entries**.

xx. If the **ERM** is fully implemented, **remarks** (manual or automatic) should be linked to the **ERM section** of the employee profile.

xxi. Consider integrating **Employee Help & Support** records under the **ERM Work History** module.

xxii. **Employee Help & Support** should also be visible under **Work History** once the **ERM** system is fully implemented.

3. **QuickBooks Integration:**

   i. **Discussion:**

      1. Jaspreet Kaur raised a question about how to align the class codes in QuickBooks with the service types.
      2. Tom Tamar explained that the service type should be linked to a department in the system and that departments should match QuickBooks class codes.
      3. Teresa confirmed that service types should remain aligned with mobile and stationary services for scheduling purposes, and a new checkbox for mapping the class should be added.

   ii. **Action:**

      1. A new checkbox will be added to map service types to departments (as classes) in QuickBooks.
      2. Departments in CommandHub will be linked to classes in

QuickBooks.
3. The company's class types (e.g., Citywide) will be mapped in QuickBooks to ensure accurate invoicing.
4. **Status:** Agreed.

4. **Report Approval Workflow:**
   i. **Discussion:**
      1. Jaspreet introduced the need for a radio button in the site configuration to control whether reports need manual approval before being sent.
      2. Tom clarified that reports should be sent automatically based on a defined time if approved by the set timeline. However, if reports are not approved in time, they will need to be sent manually.
      3. Teresa raised concerns about different timing settings and suggested that reports could be sent as soon as they are approved, or based on a pre-set time.
      4. Jaspreet introduced a change to track the status of reports as "approved," "rejected," or "resubmitted."
      5. Tom confirmed that rejected reports should go back to the employee for correction with a rejection note. The employee will edit the report and resubmit it.
      6. Jaspreet asked about adding status indicators to track whether a report was resubmitted, approved, or rejected.
      7. **Action:**
         a. Implement a feature where if reports are not approved by the deadline, they will be sent manually by the admin.
         b. For reports approved after the deadline, they will be sent in the next batch automatically.
         c. **Status:** Pending finalization of timing logic.
         d. Update the report status system to include "approved," "rejected," and "resubmitted" statuses.
         e. Add analytics to track the approval/rejection rates per employee and per client, including the percentage of reports rejected and resubmitted.
         f. **Status:** Agreed.

5. **Call Notes Visibility and Export:**
   a. **Discussion:**
      i. **Jaspreet Kaur**: Should call notes be exportable, printable, and included in reports?
      ii. **Tom Tamar**: Proposed that call notes should be viewable only if selected and should be exportable along with the call report.
      iii. **Teresa**: Confirmed that the call notes are meant for internal purposes, showing the dispatcher's actions and call status. Agreed that it could be visible to the client, as in the previous system.
      iv. **Decision**: Display call notes at the bottom of the report PDF, accessible to clients.
      v. **Action**: Implement the option to view and print call notes with the call reports.

6. **Linking Calls to Incident Reports:**
   a. **Discussion:**
      i. **Jaspreet Kaur**: We need the ability to link calls to incident reports in the system. Should this apply to all forms?
      ii. **Teresa**: Yes, linking calls should apply to all forms (incident, trespass, vehicle, etc.). For example, if an officer is assigned a call for a vehicle in the fire lane, they should be able to complete the report and link it to the call.
      iii. **Tom Tamar**: Agreed that all forms should allow call linkage, including incident reports, vehicle reports, and trespass reports.
      iv. **Decision**: Link all report forms to calls.
      v. **Action**: Implement call linkage for all forms.
      vi. **PDF Report Considerations:**
         1. **Jaspreet Kaur**: Should the call details be included in the PDF reports when linked to forms?
         2. **Teresa**: Yes, call details should appear in the report when forms are linked.
         3. **Action**: Include call details in PDF reports when a form is linked to a call.
      **vii.** **Preventing Duplicate Reports:**
         1. **Jaspreet Kaur**: To avoid duplicate reports, if an officer has already created a report for a call, they should not be able to create another report for the same incident or call number.
         2. **Tom Tamar**: Agreed, there should be one report per officer per incident. If a second officer is involved, they should only add a narrative or select a different form.
         3. **Action**: Ensure that only one report per officer can be created for the same incident or call.
         4. **Decision**: Officers should not be able to create duplicate reports for the same incident.
      **viii.** **Adding Call Number to Forms**
         1. **Jaspreet Kaur**: Should the call number be added to all forms (incident, trespass, vehicle, etc.)?
         2. **Tom Tamar**: Yes, the call number should be added to all forms for seamless reporting and linkages.
         3. **Action**: Add a call number drop-down to all report forms.
      **ix.** **Primary Unit and Backup Units**
         1. **Jaspreet Kaur**: The priority of the "Primary U.S. Backup Units" ticket was discussed. Should it be added to the current priority list?
         2. **Teresa**: Not required right now. The primary unit will be the only one allowed to create an incident report, with others only adding regular reports. This feature can be worked on later.
         3. **Decision**: Not to prioritize the “Primary U.S. Backup Units” ticket at this moment.
         4. **Action**: Work on the primary unit feature in a later phase.
      **x.** **Incident Report Process for Multiple Officers**
         1. **Tom Tamar**: In case of a major incident (e.g., a shooting), multiple officers may be involved. The first officer should

write the incident report, while the others write their narratives or complete other forms (e.g., towing, trespassing).

2. **Jaspreet Kaur**: Clarified that there should be no multiple incident reports for the same event, only one for each incident with various forms linked.
3. **Action**: Ensure that only one incident report per incident is allowed, with the possibility of linking additional forms to the same incident.

xi. **Form Mapping and Workflow:**

1. **Jaspreet Kaur**: The mapping for forms should include the incident number drop-down. When a report is created, it should automatically populate the call details.
2. **Tom Tamar**: Confirmed that when a form is created, the incident number should be selected, and the form should be linked to the call details.
3. **Action**: Implement the feature where incident numbers are mapped to forms and show call details when creating reports.
4. **Teresa**: Some features related to the primary backup units and incident report workflow can be delayed for later phases.

7. **Next Meetings:** Meeting timings will be now as below..
   a. Wednesday @ 9:00 AM – Ticket Review
   b. Thursday @ 9:00 AM – New Feature Discussion