Minutes of Meeting

Date and Time	21 August 2025 09:00 PST	**Meeting type**	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Sangita • Vishesh • Ravinder • Rahul
Attendees (Client Side)
• Tom, Teresa, Matt

Agenda
• **Discussions on the following:** ◦ ESF Report Issue ◦ Instance Management ◦ Sprint Priorities ◦ Development & QA Timeline ◦ Sprint Planning & Timeline ◦ Callout Documentation Feature ◦ Reports & Forms Linking Flow ◦ Dropdown / Report Creation ◦ Activity Code → Form Mapping ◦ Edge Cases (False Alarms, Secondary Units) ◦ PDF & Data Linking ◦ ERM & Work History Demo

The following things are discussed:

1. **ESF Report Issue**
    a. Teresa confirmed she received the ESF report email.
    b. Kuldeep clarified the report was created for training purposes and included Teresa's email.
    c. Teresa to check with David if the client also received the report (logs confirm it was sent).
2. **Instance Management**
    a. Jaspreet shared the active instance sheet (to be shared via Slack/email with Teresa).
    b. Teresa requested the following actions:
        i. Disable : State Side is Secure, EPG, Invictus, Watercolor, Training two, Training three, Training four, Training five, IGY6
    c. Training instances were discussed:
        i. Initially created for free trials but no longer required.
        ii. Decision: Keep only one training instance for reference, remove the rest.
3. **Sprint Priorities**
    a. **Current Sprint (this week):**
        i. Help and Support
        ii. Mass Emails
        iii. Scheduling
        iv. ERM Work History
        v. System Flow Changes (e.g., Petrol Flow based on BEAT/Call alignment, Report Approval process)
        vi. Next Button Implementation
        vii. Leave Request History & Detail Page
        viii. Form Linking → Changed to **Report Linking** (checkboxes on reports to link forms).
    b. **Next Sprint (starting 25th August):**
        i. Scheduling (continued)
        ii. Callout Sobriety Documentation
        iii. PTO & SICKPAY implementations
        iv. Report Linking (calls to incident reports)
        v. Caller History (Priority #17 / Sprint Priority #9)
        vi. Additional Caller to Open Call feature
        vii. Analytics module development
        viii. Production fixes / PSSP ESF priorities if needed
4. **Development & QA Timeline**
    a. Target: Complete current sprint development by tomorrow.
    b. QA testing: Monday & Tuesday.
    c. Post-QA, the build will be shared with Teresa for review before deployment.
5. **Sprint Planning & Timeline**
    a. **Sprint Planning:**
        i. Tom asked about which tasks are on the next build.
        ii. Jaspreet clarified: Sprint scheduled to **start 25th August**.
        iii. Teresa emphasized that Sprint items should be updated by Sunday.

iv. Kuldeep explained:
1. Sprint 1 is targeted to be completed by **27th/28th August**.
2. Development will finish by **25th/26th August**.
3. Analytics is partially started but final delivery is deferred to the next sprint.

v. **Decision:** Sprint 1 completion target is 27–28 August, with production push planned after QA.

b. QA & Build Release Schedule

i. Jaspreet confirmed:
1. Development will complete by **Friday (tomorrow)**.
2. QA testing on **Monday & Tuesday**.
3. Teresa will receive a testing sheet/tickets by **Wednesday**.

ii. Teresa asked if a build will be available this Sunday.

iii. Team clarified: **No build on Sunday**.

iv. Kuldeep suggested: Mid-next week (Wednesday/Thursday) build release, after QA.

v. **Decision:** Next build to be released **mid-next week** (pending Teresa's approval).

c. Sprint 2 Start Date

i. Tom and Teresa sought clarity on the Sprint 2 timeline.

ii. Kuldeep and Jaspreet confirmed:
1. Sprint 2 development starts the week of 25th August.
2. Production for Sprint 1 and development of Sprint 2 will overlap slightly.

iii. **Decision:** Sprint 2 officially starts on **25th August**.

6. Callout Documentation Feature

a. Jaspreet raised a question about documenting callouts in the scheduling module.

b. Teresa clarified requirements:

i. Dispatch/admin should be able to mark a shift as a callout.

ii. This should:
1. Document the callout in the employee's ERM record.
2. Capture reason for callout.
3. Return the shift to the open pool (or allow the dispatcher to reassign).
4. Display an icon on the shift tile for easy identification.

iii. Decision: Callout documentation flow to be added to development scope.

7. Reports & Forms Linking Flow

a. Jaspreet proposed: while creating a report, users should be able to link forms (Incident Report, Parking Citation, Trespass Notice, Field Interview) via checkboxes.

b. Concern: Incident Report form is too large and contains multiple dependencies (police, fire, ambulance, etc.), making inline modal submission complex.

c. Suggested solution: after report submission → redirect to selected forms sequentially (e.g., Incident Report → Trespass → Parking).

d. Tom clarified:

i. The flow must be simplified for end-users.

    ii. Users should directly land on the correct form after selection, not save first and then redirect.
    iii. Decision: Dropdown + direct navigation approach preferred.

8. **Dropdown / Report Creation**
    a. Tom outlined a 3-step process:
        i. **Dropdown on Add New Report** – User selects type: Regular Log, Incident Report, Trespass, Parking Citation, FI.
        ii. **Activity Code Mapping** – Certain codes (e.g., "Shots Fired") automatically force/redirect to Incident Report.
        iii. **Attach Additional Forms** – Ability to attach Parking Citation/Trespass to an Incident Report afterward.
    b. Teresa confirmed: they had discussed activity codes mapping earlier but not implemented yet.
    c. Jaspreet reiterated: two approaches – dropdown selection OR mapping via activity code.
    d. **Decision:** Both flows to be implemented:
        i. Dropdown selection for simplicity.
        ii. Activity code mapping for automatic enforcement.
9. **Activity Code → Form Mapping**
    a. Tom & Teresa stressed importance: selecting certain codes (e.g., "Shots Fired") **must trigger Incident Report** for primary units.
    b. Concern: Secondary units should not be forced; they only need supplemental reports.
    c. Kuldeep suggested:
        i. When user selects an activity code, show a modal with two options:
            1. Continue with normal log
            2. Redirect to mapped form (e.g., Trespass, Incident Report)
    d. Teresa preferred: a **"Go to Form" button** appears when a code is linked to a form, instead of duplicating codes.
    e. **Decision:**
        i. Primary unit → must complete mapped form (Incident Report, Trespass, etc.).
        ii. Secondary units → only supplemental logs required.
        iii. Flexible "Yes/No" modal or "Go to Form" button to handle false alarms or misclassified calls.
10. **Edge Cases (False Alarms, Secondary Units)**
    a. Scenario discussed:
        i. Dispatch marks it as "Shots Fired," but turns out to be fireworks.
        ii. The system should not force incident report completion unnecessarily.
    b. Proposed solution:
        i. Show warning/modal: "This activity code requires Incident Report. Do you want to proceed?"
        ii. If the user selects "No" → redirect to regular log and allow updating activity code (e.g., 415 disturbance).
    c. Randy confirmed this approach covers **false alarms and misreported calls**.
    d. **Decision:** Implement modal confirmation to handle exceptions.
11. **PDF & Data Linking**
    a. Jaspreet raised: current reports show forms separately, not linked to

calls/reports.
    b. Requirement: generated PDFs must **include all linked forms & attachments** tied to the report/call.
    c. Tom confirmed: when the Incident Report is created with additional forms (Parking Citation, Trespass, etc.), **PDF output should consolidate everything**.
    d. **Decision:** Update PDF export logic to include all linked forms, reports, and call references.

12. **ERM & Work History Demo**
    a. **Demo showcased:**
        i. **ERM Dashboard** with analytics, remark history, and settings.
        ii. Settings allow defining council types and categories (remark mapping).
        iii. **Remark History** includes employee remarks (e.g., blacklisted, complaint), with filters by date and remark type.
        iv. Export options available: CSV export & Print.
        v. Any **rank, pay, or site changes** generate ERM remarks (promotion, demotion, pay increase/decrease, etc.).
    b. **Rank & Pay Updates**
        i. **Promotion/Demotion**:
            1. Higher rank = Promotion.
            2. Lower rank = Demotion.
        ii. **Pay Updates**:
            1. Pay increase/decrease should generate remarks.
            2. **Decision:** Default description must capture **previous pay vs. new pay** for better clarity.
    c. **Site Add/Remove & Blacklist Notes**
        i. **Site Removal:**
            1. Must provide a reason **for each site removed** (handled one by one).
            2. If a user cancels without a reason, no note is generated.
            3. **Decision:** Each site removal must create a separate remark with reason.
        ii. **Site Addition**:
            1. No reason/note required when **adding** a site.
        iii. **Blacklist / Unblacklist**:
            1. **Note required** for both blacklisting and unblacklisting.
    d. **Terminology Fixes**
        i. Current labels in ERM causing confusion:
            1. *"Reason to Disagree"* → should be renamed to **"Employee Comments"**.
            2. *"Action Taken"* → must reflect **employer/manager actions** (e.g., issued a write-up, suspended, terminated, removed from site).
        ii. **Decision:** Remove "Agree/Disagree" flow entirely. Employees can add comments but cannot approve/disapprove remarks.
        iii. **Remark Display in Profile:**
            1. Only **positive/negative remarks** should appear to employees.
            2. Work history items (e.g., promotions/demotions) are for

HR/Admin view only, not for employee acknowledgment.

e. **KPI Discussion**
   i. Tom asked for progress on KPI documentation.
   ii. Organizer confirmed: draft document will be shared by tomorrow/Saturday with all KPI details for tracking and feedback.
   iii. Tom emphasized urgency since the team is already prepared, though manual grading is currently heavy.
   iv. Decisions Made:
      1. Each **site removal → separate reason & note** required.
      2. **Blacklist/Unblacklist → note mandatory.**
      3. **Adding site → no reason required.**
      4. Replace confusing fields:
         a. "Reason to Disagree" → **Employee Comments**
         b. "Action Taken" → **Manager Action** (write-up, suspension, termination, etc.).
      5. **Employee profile view:** only positive/negative remarks shown; promotions/demotions are HR/admin only.
      6. **KPI tracking doc** to be finalized and shared with Tom by the weekend.

f. **Employee Comments vs. Agree/Disagree**
   i. Tom strongly requested **removal of the "Agree/Disagree" option** from remarks.
   ii. Instead, employees should have **only the "Add Comment"** option (optional, not mandatory).
   iii. These comments will be logged in **Work History under Employee Comments**.
   iv. **Decision:** Replace "Disagree" section with **Employee Comments**.

g. **Action Taken Field**
   i. Tom clarified:
      1. **"Action Taken"** must be filled **by employer/manager only** (e.g., write-up, suspension, termination).
      2. Should not be tied to employee actions.
   ii. **Decision:** Add a new field **Action Taken (Employer field)** in remarks.
   iii. The field can be **optional** but visible in work history.

h. **Employee Lifecycle in Work History**
   i. Work history should automatically capture:
      1. **Hire date, department, position, rate, location** at onboarding.
      2. **Status changes** (active, inactive, terminated).
      3. **Termination details** with reason + employee comment.
      4. **Rehire events** with new start date & work history restart.
   ii. Tom requested a **warning prompt** when rehiring a previously terminated employee.

i. **Data Import / Onboarding**
   i. For companies already having ERM data:
      1. A **mapped Excel import template** will be provided.
      2. Data matching the template can be imported automatically.
      3. Non-standard data must be manually entered.

    ii. Tom asked if onboarding for large clients (e.g., 200 employees) could include bulk history import.
    iii. Organizer confirmed: **Yes, onboarding support for bulk upload is possible.**

j. **Backdating Remarks**
    i. Tom asked if old incidents can be entered with past dates.
    ii. Organizer confirmed: Yes, remarks can use **past incident dates**.
    iii. Issue identified: Current **date picker bug (Flickstack)** prevents going too far back.
    iv. **Decision:** Bug to be fixed to allow full backdating.

k. **Modules & Mobile App Testing**
    i. Jaspreet mentioned email shared with a list **of modules live in production vs. staging/other instances**.
    ii. Teresa confirmed receipt but noted confusion in the sheet's third column ("citywide" mentioned incorrectly).
    iii. Teresa also reported issues testing **iOS TestFlight build (v36)** — unable to save reports.
    iv. Jaspreet clarified release notes were attached in the earlier email and can resend via Slack if needed.

l. **Decisions Made**
    i. Remove **Agree/Disagree** → replace with **Employee Comments** only.
    ii. Add **Action Taken** as an employer-only field in remarks.
    iii. Capture **full employee lifecycle** (hire → termination → rehire) in work history.
    iv. Provide **Excel import template** for onboarding employee history.
    v. Fix **date picker bug** to allow full backdating.
    vi. Clarify module mapping sheet and support Teresa on mobile app testing.