

Minutes of Meeting

Date and Time	27 August 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	Client	Citywide

Attendees (Internal)

- Rupesh
- Kuldeep
- Jaspreet
- Sangita
- Vishesh
- Ravinder
- Rahul
- Sai
- Ajay
- Gurpreet
- Kapil
- Amit

Attendees (Client Side)

- Tom, Teresa, Matt

Agenda

- **Discussions on the following:**
 - Call-Out Functionality
 - Scheduling Statistics (Labels & Logic)

The following things are discussed:

1. Call-Out Functionality:

- a. **Kuldeep** demonstrated the **call-out feature** in scheduling:
 - i. A dispatcher/authorized person can remove an agent from a shift.
 - ii. If the shift is already started, the call-out option is disabled currently.
 - iii. When a call-out is made, the shift is marked as an **open shift**.
 - iv. System asks for a **reason** when call-out is performed.

- b. **Tom Tamar's Input:**

- i. Call-out handling must support **mid-shift call-outs** (e.g., guard calls out sick but stays until relief arrives).
 - ii. Need ability for **manual checkout entry** by dispatcher or guard to reflect accurate relief time.
 - iii. Suggested introducing a distinct "**Call-Out**" **status** separate from "Open Shift".

- c. **Resolution:**

- i. Dev team will enhance the call-out process to:
 - 1. Support **mid-shift call-outs**.
 - 2. Allow **manual checkout time entry**.
 - 3. Record call-out as a separate status.

- d. **Payroll Handling:**

- i. **Jaspreet** raised a question on payroll impact.
 - ii. **Tom clarified:**

- 1. **Salaried employees:**

- a. Paid regardless of schedule.
 - b. Call-outs should still be **recorded in employee profile/work history**, but no payroll change.
 - c. Some clients (e.g., Special Police) still put salaried workers on schedules → call-outs logged but no pay impact.

- 2. **Hourly employees:**

- a. Call-out ends shift → payroll calculated on actual worked hours (clock-in/out).

- e. **Invoicing Rules:**

- i. Teresa & Tom discussed invoicing in detail:
 - 1. **Clients billed based on scheduled hours, not actual clock-in/out.**
 - 2. Example: If shift is 2–9, client pays for 7 hours, regardless of guard arriving early/late.
 - 3. **Yellow open shifts** (call-outs) → still billed to client, unless admin changes to **gray open**.
 - 4. **Gray open shifts** → not billed to clients.
 - 5. Payroll = based on timesheets.
 - 6. Invoicing = based on schedule.
 - ii. **Confusion Point:** Teresa mentioned some clients (e.g., Pinnacle) want billing from **timesheets** (actual hours worked).
 - 1. **Tom pushed back:** Standard must remain **schedule-based billing**.

2. Exception only if **explicitly disclosed to client**; otherwise creates inconsistencies.

f. Employee-Initiated Call-Outs

- i. **Jaspreet** asked if employees should be allowed to request call-outs.
- ii. **Teresa** strongly opposed, citing misuse risk (e.g., pressing “call-out” and going back to sleep).
- iii. **Tom** agreed with Teresa’s concern.
- iv. **Decision: Employees cannot request call-outs.** Only dispatch/admin will handle them.

g. Call-Out History:

- i. **Jaspreet** asked how to showcase history — as part of scheduling or as a dedicated list.
- ii. **Tom** suggested:
 1. Automatic entry into **employee work history** as a comment.
 2. Later use in **KPI tracking** (excused/unexcused).
- iii. **Teresa** suggested tracking in **analytics** as well.
- iv. **Kuldeep** explained current setup:
 1. ERM history already logs call-out as a remark with details (reason, date, site, performed by).

h. Excused vs. Unexcused Call-Outs:

- i. **Tom** emphasized the need to differentiate:
 1. **Excused call-outs** → no negative KPI impact.
 2. **Unexcused call-outs** → negative KPI points.
- ii. **Kuldeep** confirmed that the system can log remarks with condition-based flags.
- iii. **Plan:**
 1. Add **radio buttons (Excused / Unexcused)** when marking call-out.
 2. Link to **company settings defaults** so KPIs and points are mapped automatically.

i. Revoking or Editing Call-Outs

- i. **Jaspreet** clarified the revoking option is unnecessary since employees cannot request call-outs.
- ii. **Teresa** raised use-case: employee initially unavailable but later shows up → need to log in ERM as “disregard”.
- iii. **Kuldeep** noted:
 1. The current system only supports **editing existing remark**, not adding extra notes.
- iv. **Tom & Teresa** requested:
 1. Add “**Add Note**” option (instead of editing).
 2. Add **delete remark option** for admins (restricted access only).
- v. Decision:
 1. The system will support **Add Note** and **Delete Remark (admin-only)**.

j. Scheduling & Usability Enhancements

- i. **Teresa & Tom** discussed label changes:
 1. Change “Shift Call Out” → “**Mark as Call-Out**”.
- ii. **Tom** raised scenario: removing a guard from shift without it being a

- call-out (e.g., rescheduling error).
- iii. **Kuldeep** explained:
1. Shifts can be marked as **open** using the pencil/edit option.
 2. Will provide conditional options:
 - a. **Excused / Unexcused call-out.**
 - b. **Open shift (non-call-out).**
- k. Call-Out Notifications**
- i. **Jaspreet** proposed a default notification type for call-outs (like other system notifications).
 - ii. **Tom** highlighted real-world case:
 1. If dispatcher A is not available, dispatcher B should still notify correct stakeholders.
 - iii. **Teresa** suggested future integration with **supervisor mapping** (auto-notify supervisors for their pool).
 - iv. **Tom's Proposal:**
 1. Add **Notify section with dropdown** to select department heads/dispatchers during call-out submission.
 2. Selected users receive notification immediately.
 3. **Tom:** Suggested allowing the scheduler to decide whether to notify anyone or not. If non-schedulers handle call-outs, they should have an option to notify admins/dispatchers.
 4. **Proposal:** Add a "**Notify**" **dropdown option** in the call-out screen to select one or multiple recipients (admins/dispatchers).
 5. **Teresa:**
 - a. Supported multiple selections.
 - b. Suggested call-out notifications should be configurable in **Company Settings** under "Notification."
 - c. Recipients defined in settings would appear in the dropdown list.
 - d. Requested removal of the redundant confirmation pop-up ("Are you sure you want to do a call-out?") since it adds unnecessary clicks.
 6. **Kuldeep:** Confirmed removal of extra confirmation screen. Suggested dropdown should support single or multiple selections.
 7. **Tom & Teresa** agreed:
 - a. Notification dropdown should pull from **Company Notification Settings**.
 - b. Multiple recipients can be selected at the time of call-out.
 8. **Decision:**
 - a. Remove redundant confirmation step.
 - b. Add **Notify dropdown** (linked to company notification settings).
 - c. Support multiple recipient selection.

2. Scheduling Statistics (Labels & Logic)

- a. **Kuldeep** presented updated stat labels:

- i. Contracted Hours
- ii. Operating Hours
- iii. Staffed Hours
- iv. Open Hours
- v. Unscheduled Hours
- vi. Overtime / Double Overtime / Extra Coverage

b. Definitions Discussed:

- i. **Contracted Hours** – Pulled from site notes/agreements. Only applies to standing sites.
- ii. **Operating Hours** – All hours scheduled in the system.
- iii. **Staffed Hours** – Hours with an assigned guard (blue/green shifts). Open (yellow) shifts excluded.
- iv. **Open Hours** – All yellow shifts (unfilled).
- v. **Unscheduled Hours** – Ongoing debate:
 - 1. Kuldeep: Calculated as **Contracted – Operating Hours**.
 - 2. Teresa: Disagreed, citing inflated operating hours when multiple guards are scheduled in a single contracted shift. Suggested unscheduled hours should be based directly on **gray areas** (shifts left blank).
 - 3. Tom: Agreed with Kuldeep that gray areas may include training/non-billable shifts and shouldn't count toward unscheduled hours. Final stance – unscheduled = contracted – operating, but mapping issues need fixing.

c. Clarifications:

- i. **Staffed Hours** should reflect shifts with a guard's name attached, regardless of actual clock-in/out.
- ii. **Check-in/out data** applies only for payroll, not for scheduling stats.
- iii. **Operating Hours** can exceed Contracted Hours if extra coverage or overlapping shifts exist.

3. Issues Raised:

- a. Teresa highlighted discrepancies where operating hours exceeded contracted hours, causing confusion in unscheduled hour calculation.
- b. Example: A contracted shift (one line) may have multiple guards (2–3 assigned), leading to inflated operating hours.
- c. Tom insisted mapping logic is incorrect and needs to be revisited to ensure calculations align.
- d. Kuldeep acknowledged potential mapping errors and agreed to recheck calculations.

e. Decisions Made:

- i. **Call-Out Flow**
 - 1. Remove redundant confirmation pop-up.
 - 2. Add **Notify dropdown**, pulling names from **Company Notification Settings**.
 - 3. Allow selecting single or multiple recipients.
- ii. **Scheduling Stats**
 - 1. Contracted hours = based on site notes/agreements.
 - 2. Operating hours = all scheduled hours.
 - 3. Staffed hours = all assigned shifts (blue/green).
 - 4. Open hours = unfilled yellow shifts.

5. Unscheduled hours = still under review; current formula (Contracted – Operating) accepted temporarily.

f. Contracted Hours vs Operating Hours

- i. **Teresa** highlighted a discrepancy between **contracted hours (42 hrs/week)** and **operating hours** due to extra staff being scheduled.
- ii. Additional training/coverage shifts increased the hours, leading to confusion in calculations.
- iii. **Formula clarification:**
 1. *Contracted hours – Operating hours ≠ Unscheduled hours* because added training/extral staff are inflating total operating hours.

g. Mismatch in Numbers

- i. **Tom** explained the mismatch was due to **extra people added** to the schedule where they weren't required.
- ii. These should not be billed to the client and should be separately flagged as **extra coverage**.
- iii. The **light gray blocks** represent scheduled/contracted hours.
- iv. **Dark gray blocks** with hours indicated coverage ended and should not be counted toward contracted hours.

h. Handling of Coverage End (Dark Gray Blocks)

- i. **Teresa & Tom** agreed that dark gray blocks should **not display hours**, as it causes confusion.
- ii. Instead, they should remain fully grayed-out to show coverage ended.
- iii. **Kuldeep** confirmed he will remove timestamps from dark gray slots.

i. Extra Coverage Identification

- i. Extra coverage = when additional shifts (green/blue) are added beyond contracted hours.
- ii. These need to be:
 1. Clearly marked as **extra coverage**.
 2. Categorized further into **billable vs non-billable** (e.g., training vs client-requested coverage).

iii. Examples discussed:

1. Monday's contracted shift (17:00–23:00) is the base coverage.
2. Additional shifts (green/blue) scheduled in parallel = extra coverage.
3. Same applies for Tuesday & Wednesday extra blue shifts.

j. Clarification on Overlapping Shifts

- i. **Kuldeep** raised a scenario: when an open shift (17–23) overlaps with a scheduled blue shift, how do we differentiate between operating vs extra coverage?
- ii. **Tom clarified:**
 1. The first scheduled line (yellow/blue) is **contracted coverage**.
 2. Any additional overlapping shifts are **extra coverage**.
 3. These must be captured in reports separately under "extra coverage."

k. Next Steps / Action Items

- i. **Kuldeep** to:
 1. Remove timestamps from dark gray (coverage ended) slots.
 2. Ensure calculations only use **light gray (scheduled) hours** for contracted coverage.
 3. Map extra shifts (beyond contracted hours) under **extra coverage category**.
- ii. **Team to decide** later whether extra coverage is billed or remains unbillable (depends on client agreements).