Minutes of Meeting

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

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Jatin • Sangita • Vishesh • Ajay • Akash • Kapil • Gurpreet
Attendees (Client Side)
• Tom, Teresa, Randy, Matt

Agenda
• **Discussions on the following:** ○ Invoice Class Code Demo ○ Call Report Details ○ Call Notes on Reports ○ System Performance Issues in Production ○ Training Domains and Demo Site ○ Training Module Changes and New Client Onboarding ○ End of Shift Message and Notification ○ Help & Support Flow ○ Prioritization of Tasks ○ Approval for Documentation ○ Payroll Issue

The following things are discussed:

1. **Invoice Class Code Demo:**
    a. **Jatin Mehta** presented the invoice class code implementation, explaining that it maps the class code to the product service in the invoice as discussed in the previous call.
    b. Once an invoice is approved, it creates an invoice for a specific customer (e.g., Citywide).
    c. Client display name and service details (including site ID and coverage name) are shown in the invoice.
    d. A new section for the class was added, which includes the department name, such as patrol and others.
    e. If the department name or service doesn't exist, the system will create and assign it accordingly.
    f. A site name is also displayed, and updates can be made in the class section if needed.
    g. **Jatin Mehta** confirmed that the feature is currently on the stage server and will be deployed to production **by the end of this week**.
    h. **Rupesh** and **Jaspreet** confirmed the planned release this week after **Teresa's approval**.
    i. **Tom Tamar** emphasized that once Teresa gives approval, the deployment should proceed immediately.
2. **Call Report Details:**
    a. **Jaspreet** presented the changes made to the incident report, displaying the activity code and relevant details (e.g., type and color of the incident).
    b. **Jaspreet** asked whether victim/witness details should be included in the report if the incident involves injury.
        i. **Tom Tamar** confirmed that if the victim is injured in the system, the details should be included in the report.
3. **Call Notes on Reports:**
    a. **Jaspreet** raised the question of whether the call notes should be linked to sites or calls and how clients should have the option to include/exclude these notes on the report.
    b. **Teresa** clarified that **call notes stay with the call**, and the dispatcher should have the option to show call notes on the report.
        i. **Jaspreet** proposed a checkbox on the call form to show call notes on the report.
        ii. Another option was to link the setting to the site, providing a one-time configuration for each site.
    c. **Teresa** added that the reason for initially withholding notes was to manage late call responses (time of call received, dispatched, and completed). However, since these details are already being displayed, there's no need to withhold the notes anymore.
    d. **Tom Tamar** asked whether it's necessary to give clients the option to choose whether to display call notes in the report.
    e. **Teresa** mentioned that the original idea was to offer a full incident tracker for clients, showing every step of the process.
    f. **Tom Tamar** emphasized that the decision should be made for all clients or none, rather than selectively. It should be a **company-wide setting**.
    g. **Jaspreet** confirmed that a company-wide setting would allow the choice to either show or hide the call notes for all reports.

4. **System Performance Issues in Production:**
    a. **Jaspreet** raised concerns about the production environment, highlighting that the system was facing a timeout error due to the heavy data load from three tables: system files, user reports, and user tracking.
    b. The data in these tables spans over the last four years, causing the system to crash and consuming excessive DB CPU. As a result, **CPU and memory upgrades** were performed temporarily.
    c. The solution being implemented is to **split** the data across multiple **batches** to prevent future issues. The team is working on this fix and plans to **downgrade the upgrades** once the changes are made.
    d. **Tom Tamar** emphasized the importance of preparing for larger clients (e.g., police departments), which could have significantly larger data volumes. For instance, a small police department could have 400-500 service calls per night, and a larger department, like San Diego, could have up to 3-4 thousand calls nightly.
    e. **Tom Tamar** stressed that the system needs to be scalable to handle vast amounts of data without crashing. This includes future-proofing for clients who may deal with millions of records annually.
    f. **Jaspreet** confirmed that **Kuldeep** is actively working on permanent changes that will apply to all instances, ensuring the system can handle future loads.
5. **Training Domains and Demo Site**
    a. **Jaspreet** inquired about the need for the five training domains that are currently being reworked, asking if they were still required.
    b. **Teresa** explained that the training domains were intended to be used as demo sites and for migrating data for use in future client trials.
    c. **Tom Tamar** clarified that only **one demo site** is needed. This site will be used for both **demo** and **free trials**, and the rest of the training domains can be deleted.
    d. **Tom Tamar** suggested naming the demo site something like **app.demo.com** for clarity. The goal is to eliminate unnecessary instances, as they also add to billing.
6. **Training Module Changes and New Client Onboarding:**
    a. **Jaspreet** provided an update on training changes discussed with **Randy**, noting that these have been successfully **updated on staging** and are currently being **tested**.
    b. **The ERM feature** will also be completed by tomorrow.
    c. **Jaspreet** confirmed that the new client has been onboarded and the demo is ready for their use.
7. **End of Shift Message and Notification:**
    a. **Teresa** raised an issue regarding the **end-of-shift acknowledgement** and **alternative message**. Specifically, when someone uses the alternative message (e.g., "I did not do this"), a **notification** needs to be sent to the relevant person.
    b. **Tom Tamar** asked **Teresa** to demonstrate the feature to ensure it’s functioning correctly.
    c. **Teresa** explained that the **alternative message** triggers the notification, ensuring that someone is alerted when the message is used.
    d. **Jaspreet** inquired whether the notification type needed to be configured for this, confirming that the notification would be triggered only when the

alternative message is used.

8. **Help & Support Flow:**
    a. **Discussion on Help & Support Flow:**
        i. **Objective:** Discuss how to map supervisors to employees for the help & support system, particularly to help identify who the supervisor is and who will be under their supervision.
        ii. **Key Points Discussed:**
            1. Teresa shared that employee profiles can include a supervisor field, and a drop-down list will show supervisors based on department (e.g., dispatch). This would allow for the selection of employees under a specific supervisor.
            2. It was agreed that employees would be grouped under their respective department heads.
    b. **Challenges with Standing Supervisors and Time-based Shifts:**
        i. Tom raised concerns regarding the complexity of assigning standing officers to supervisors since these officers are assigned based on shifts or sites, not specific supervisors.
        ii. Teresa mentioned that aligning times (like day vs. night shifts) with supervisors is a challenge. Dispatchers, for example, may only oversee daytime or nighttime employees, leading to issues with notifications (e.g., if a nighttime officer misses a scan, a daytime dispatcher should not receive this notification).
        iii. **Proposed Solution:** The system could be set up so that notifications are sent based on whether the dispatcher or supervisor is working during the shift (day or night).
    c. **Decision-Making for Help & Support Forms**
        i. **Key Points:**
            1. For forms like harassment, time-off requests, or department changes, the conversation turned to who should be the decision-maker (supervisor or manager).
            2. Teresa suggested that each department has forms mapped to decision-makers (e.g., for harassment, it could be one or two people per department).
            3. Tom agreed that mapping forms directly to decision-makers would be easier than trying to manage supervisor-to-employee mappings for each scenario.
        ii. **Future Considerations:**
            1. There was some concern about aligning employees to supervisors in the system and allowing employees to choose the recipient of the forms. For example, if someone files a harassment complaint against a supervisor, they need the option to choose a different recipient for their complaint.
    d. **Structure of the Help & Support System (Form Mapping):**
        i. **Proposed Structure:**
            1. **Form Setup:** A "Help & Support" tab will contain a list of available forms (e.g., harassment, time off requests, department changes, promotion requests, rate increase requests).
            2. Employees will choose a form, then select the department

(Management, Admin, Standing, Patrol).

3. The system will then show the decision-makers (supervisors/managers) for that department, and the employee can select the person or input an email for notifications.
4. Teresa suggested having a list of department heads for each form, rather than mapping forms directly to specific departments.

ii. **Handling Special Cases (Harassment Forms):**

1. **Scenario Discussed:** If an employee files a harassment complaint against their supervisor, the employee should be able to see who the form is going to (e.g., Mike and Randy). The employee can then choose to deselect Mike, ensuring the complaint goes only to Randy.
2. **Proposed System Updates:**
    a. Allow multiple decision-makers to be attached to a form.
    b. Employees should be able to select or deselect recipients, especially in cases where complaints are filed against the primary decision-maker.
    c. An additional feature may allow an employee to add a secondary recipient (e.g., someone in HR or a higher-ranking officer).

iii. **Addressing Notifications and Ticket Tracking:**

1. Notifications should be assigned to supervisors based on the shift they are working. Supervisors should only receive notifications related to the shifts they manage (e.g., daytime vs. nighttime).
2. **Tracking Progress:** The system will log all actions on a ticket/form. For example, once Randy views a form, the system will automatically log it as "viewed by Randy on [date/time]."
3. Manual notes can also be added by the decision-maker to track progress or actions taken.

iv. **Handling Ticket Closure and Status Updates:**

1. Once a form/ticket is reviewed, the person responsible (supervisor) should have the ability to mark the ticket as completed or resolved.
2. If there is no resolution, a secondary person (e.g., a higher-ranking officer) can intervene or close the ticket.
3. **Status Tracking:** The system should allow tracking of each ticket's status, showing who is responsible for the ticket, when it was reviewed, and the progress made.

v. **General System Questions and Suggestions:**

1. **Ticket Overflow Handling:**
    a. If a supervisor (e.g., Randy) has multiple open tickets, there may be a concern that they won't be able to respond promptly. The system could restrict or flag tickets if the supervisor has too many open tickets.
2. **Status Updates for Forms:**

a. When forms are submitted, an automatic log should record who has viewed the form and any actions taken. This will help ensure transparency and provide a complete audit trail.

9. **Prioritization of Tasks:**
    a. Jaspreet asked about the prioritization of tickets such as shift bidding, report approval process, activity tracking, employee health, support incident report, and linking to calls.
    b. Teresa mentioned that approvals are required to prioritize tasks. She emphasized that, in order to provide approval, she needs timelines.
    c. Jaspreet clarified that they need confirmation from Teresa's end to proceed with implementation once the approvals are granted.
    d. **Action Point**: Teresa will confirm if the discussed items align with expectations, and once approvals are received, timelines will be shared.
10. **Approval for Documentation:**
    a. Jaspreet shared that the documentation for help and support will be updated as per today's discussion.
    b. Teresa is required to review and approve the rest of the documentation.
    c. **Action Point**: Teresa will review and approve the documentation to move forward with task implementation.
11. **Payroll Issue:**
    a. Teresa mentioned an issue with generating a payroll report, as dates were not displaying correctly.
    b. Kuldeep explained that the payroll will be based on the settings already mapped in the profile, and the next payroll will be generated on the 16th of July.
    c. **Action Point**: Kuldeep will check the payroll settings and ensure the dates are correctly mapped for future payroll runs.