Minutes of Meeting

Date and Time	30 September 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)

- Rupesh
- Kuldeep
- Jaspreet
- Ravinder
- Rahul
- Ajay
- Gurpreet
- Kapil
- Pankaj

Attendees (Client Side)

- Tom, Teresa, Randy

Agenda

- **Discussions on the following:**
  - Form Linking with Activity Codes & Reports
  - PTO & PSL Module Overview
  - Notification & Call Assignment Alerts
  - Attendance & Payroll– Unpaid Breaks
  - Scheduling & Payroll Discussion

The following things are discussed:

1. **Form Linking with Activity Codes & Reports**
   a. **Form Mapping with Activity Codes**
      i. Rahul demonstrated that activity codes can now be linked directly with specific forms (e.g., Parking Citation form).
      ii. On report creation:
          1. A pop-up confirms if a form is required for the selected activity code.
          2. Users can choose OK (redirects to form) or Cancel (saves report without form).
          3. This ensures flexibility – forms are not mandatory but guided.
   b. **Data Population from Incident Reports**
      i. When linking forms with incident reports:
          1. Victims, witnesses, and suspects already saved in the incident report can be selected and populated into the new form.
          2. Example: Parking Citation or Trespass form can pre-populate victim/witness data from the linked incident.
      ii. Additional manual entry remains possible if required.
   c. **Clarifications & Adjustments**
      i. **Teresa's Concern:** The system appeared to force a form completion.
          1. Clarification: The pop-up gives a choice; it is not mandatory.
          2. Adjustment requested: Pop-up should explicitly state **"Do you want to continue to the form? Yes/No"** for clarity.
      ii. **Report Reference Number:**
          1. Should be visible as an indicator of linkage between reports.
          2. Final agreement:
             a. Reference number to be included but optional via column selection dropdown.
             b. It should also be **hyperlinked** for quick navigation between reports.
   d. **Form Categories and PDF Representation**
      i. **Discussion Points:**
          1. Linked reports/forms should remain under their own categories (e.g., Parking Citation under Citations, Trespass under Trespass).
          2. However, incident reports should display links to their associated forms for cross-referencing.
      ii. **Client PDF Output:**
          1. PDF should show the **primary report (e.g., Incident Report)** with linked forms (e.g., Parking Citation, Trespass Notice) appended in their respective categories.
          2. Each linked form will carry a **report reference number** to indicate its connection to the main incident.
          3. This ensures clarity while maintaining category-level organization.
2. **PTO & PSL Module Overview**

a. Demonstrated the **PTO (Paid Time Off) and PSL (Paid Sick Leave)** settings under **HR Configuration**.
b. Added a new tab where companies can configure:
    i. **Options:** Provide time off or cash-out.
    ii. **Applicability:** Configure PTO/PSL at department level.
    iii. **Adjustments:** PTO/PSL accruals can be set as weekly, monthly, or yearly.
c. **Accrual Rules**
    i. Jaspreet clarified:
        1. Weekly/monthly/yearly accrual options define when employees become eligible.
        2. Cap option allows specifying maximum hours that can be accrued.
    ii. **Tom's Feedback:** Current flow looks good and does not need changes.
    iii. **Teresa's Solutions & Randy's Input (based on Employee Handbook):**
        1. PTO and PSL accruals must also support **daily/hourly calculations**.
        2. Confirmed rule: *1 hour PTO/PSL earned for every 30 hours worked*.
        3. Accumulation capped at **80 hours annually**, with **48 hours usable per year**.
        4. **Rollover:** Both PTO and PSL can roll over to the next year (based on handbook).
d. **Employee-Side Functionality**
    i. Employees will see:
        1. Leave Balance: PTO and PSL balances displayed.
        2. Request Options:
            a. Request Time Off (PTO/PSL).
            b. Request Cash-Out (PTO only).
    ii. If PTO is not enabled, only PSL requests will be visible.
e. **Leave Request Workflow**
    i. **Current Plan:**
        1. PTO/PSL selection at department-level configuration.
        2. The leave request module will be enhanced later to allow employees to choose PTO or PSL directly.
    ii. **Clarification from Jaspreet:**
        1. For now, focus is on settings. Leave request integration will be addressed in the future phase.
f. **Admin-Side Functionality**
    i. Discussion on whether to show PTO/PSL columns in the employee listing:

                1. **Teresa's Feedback:** Avoid cluttering the main employee page.
                2. Preferred approach: Adjust PTO/PSL balances within the employee profile under a separate tab.
        ii. **Permissions:**
                1. Not all admins should be allowed to edit balances.
                2. PTO/PSL modification rights will be controlled via role-based permissions.

3. **Notification & Call Assignment Alerts**
   a. **Discussion on Sound vs Visual Alerts:**
      i. Clients tested the system sound (loud horn) but preferred **visual notifications over sound**.
      ii. Tom emphasized the need for **pop-ups** or **flashing notifications** instead of relying on audio alerts, as officers may not hear sounds while driving or working.
      iii. Randy added that most patrol officers keep laptops closed while driving, so a **pop-up upon reopening the laptop** would be more effective.
      iv. Consensus: **Sound not critical**, visual alerts (flashing or pop-up) are preferred.
   b. **Type of Visual Notifications:**
      i. Current notification is a **small green pop-up** that disappears automatically.
      ii. Clients want a **larger, mandatory pop-up** (similar to "Message of the Week") that blocks the screen until acknowledged.
      iii. Pop-ups should be **color-coded by call priority** (e.g., Red = urgent, Green = normal, White = no priority assigned).
      iv. Pop-up should require **manual acknowledgment (click)** to disappear.
      v. Option suggested:
         1. **"Acknowledge"** → dismiss notification.
         2. **"Take me to Call"** → directly open the assigned call.
   c. **Additional Feature Request:**
      i. Add a **"Viewed/Acknowledged" status indicator** (e.g., a checkmark) on the dispatcher's call page to confirm if the officer has seen the notification.
      ii. This would help dispatchers identify unacknowledged calls and follow up.
4. **Attendance & Payroll– Unpaid Breaks**
   a. **Problem:**
      i. The attendance page currently requires manual input for unpaid breaks.

ii. This caused **915 missed/unadjusted breaks** from **Sept 16 – present**, affecting payroll.
   b. **Client Request:**
      i. A one-time **script to auto clock-in/clock-out unpaid breaks** in the background for the mentioned date range.
      ii. Must be completed before the next **payroll run (tomorrow morning)**.
   c. **Agreed Action:**
      i. Jaspreet confirmed this can be handled.
      ii. The development team will implement the script **tonight** (developer available next morning, IST, aligning with client's deadline).
      iii. Client emphasized urgency due to **900+ corrections required otherwise**.
   d. **Future Requirement:**
      i. Need a **bulk clock-in/out feature for breaks** to prevent recurrence.
      ii. Current feedback on the attendance page (except breaks issue) has been **positive** from end users (Tanya, Jennifer).

5. **Scheduling & Payroll Discussion**
   a. Tom requested clarity on scheduling issues and raised concerns about incorrect calculations.
   b. Teresa confirmed that tickets were already raised and being checked.
   c. Payroll-related calculations (contracted, operating, staffed, overtime, double time) were discussed in detail.
   d. **Repeated Calculation Errors:**
      i. Tom highlighted consistent mistakes in analytics and scheduling math (addition, subtraction, percentage calculations).
      ii. Concern raised that incorrect numbers may lead to wrong decisions impacting payroll, clients, and financials.
   e. **System vs Human Error:**
      i. Ravinder admitted mistakes were on the team's side, not system logic alone.
      ii. Jaspreet clarified that complications in fetching data may be causing mismatches.
   f. **Critical Feedback from Tom:**
      i. Wrong numbers in reports can lead to severe consequences, including payroll mismanagement or costly business decisions.
      ii. Emphasized need for double-checking calculations manually before presenting.
   g. **Definition Alignment of Hours**
      i. **Contracted Hours:** Based on job site notes.
      ii. **Operating Hours:** All scheduled hours (including open shifts, overtime, double time, and extra coverage).

      iii. **Staffed Hours:** Only shifts with an assigned person's name (covered shifts).

      iv. **Open Hours:** Yellow-coded open shifts (no assigned staff).

      v. **Unscheduled / Dark Hours:** Grey shifts with time but no coverage.

      vi. **Overtime/Double Time:** Counted in operating hours as regular hours; multipliers apply only at payroll stage.

      vii. Tom requested **overtime percentage calculation against operating hours** (e.g., 4.5%).

h. Reporting & Filters

      i. Tom suggested restructuring the display order:
         Contracted → Operating → Extra Coverage → Staffed → Open → OT/Double Time → Unscheduled.

      ii. Teresa suggested grouping and adding **filters** to quickly view specific categories (e.g., overtime, open hours, extra coverage).

      iii. Kuldeep to review filter implementation (pending from last call).

i. Attendance & Breaks

      i. Discussion on **bulk check-in/check-out**:

         1. Features should also auto-calculate breaks and lunches.

         2. Option to add separate handling for breaks/lunches if needed.

      ii. Ravinder confirmed implementation is planned.

j. Call History & Additional Caller Notes

      i. Issue identified:

         1. When adding **additional caller notes**, the system was still showing the original **caller's notes** instead of the new caller's notes in history.

         2. This caused inaccurate call history representation.

      ii. Agreement: Call history should reflect **notes specific to the caller selected**, not just the original caller.

      iii. Team to review ticket #1054 and fix accordingly.

k. Call Prioritization Colors

      i. Concern raised about **white/unassigned calls** showing on the screen.

      ii. Clarified that ideally every call should have a **priority (red, yellow, green, orange)**, so white calls should not appear.

      iii. Some calls are **auto-prioritized** (e.g., 415).