Minutes of Meeting

Date and Time	06 November 2025 09:00 PST	**Meeting type**	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
- Rupesh   - Kuldeep   - Jaspreet   - Ravinder   - Ajay   - Pankaj   - Akash   - Rahul
Attendees (Client Side)
Tom, Teresa, Matt, Randy

Agenda
Discussions on the following: - Pending Deliverables & Timelines   - Training Module Access Issue   - Corporate Level Access Requirement   - Analytics Updates   - PTO/PSL Demonstration & Discussion

The following things are discussed:

1. **Pending Deliverables & Timelines**
    a. Tom expressed concern over deliverables that were initially targeted for completion by the end **of October**, referencing a previous meeting where expectations were set for September.
    b. The team acknowledged delays due to **shifted priorities** and emphasized that some tasks are complete but pending review.
    c. Agreed to review **priority items in detail** during the next day's call before proceeding with new agendas.
2. **Training Module Access Issue**
    a. Tom reported continued inability to access training courses despite multiple discussions.
    b. Investigation revealed that multiple role assignments (Company Admin, Admin, Patrol, and Field Officer) caused inconsistencies in access behavior.
    c. Default role for Tom's Arizona branch was mistakenly set to Normal Admin, limiting his training view.
    d. Issue resolved by setting Company Admin as the default role.
    e. Clarified that upon switching roles from dropdown, data visibility changes per last-selected role.
3. **Corporate Level Access Requirement**
    a. Tom emphasized the need for **Corporate Level Access** that allows top-level users to view **all branch data collectively** (e.g., San Diego, Riverside, Arizona, LA).
    b. Discussed need for a **"Company Admin" or "Super Admin"** level with holistic system access.
    c. The team confirmed prior discussions on this requirement and agreed to **create a new ticket** to define and implement the corporate access model.
    d. Tom explained its business importance — without this feature, future **multi-branch clients** could face data limitations, potentially impacting **sales and scalability**.
4. **Analytics Updates**
    a. Tom appreciated the **improved Analytics UI** and mentioned positive client response during recent demos.
    b. The analytics module received significant feedback; updates are currently in final QA.
    c. **KPI module development** is complete and undergoing **unit testing** before QA handoff.
    d. Target: Deliver both modules for QA verification by **next day**, followed by **staging validation** and **production deployment (Citywide instance)** for real data validation.
    e. **Tom's Input:**
        i. Suggested pushing analytics to **production (Citywide)** first to validate real data accuracy.
        ii. Confirmed he won't be concerned about minor data discrepancies, as live validation helps identify calculation issues faster.
    f. Ravinder's Input:
        i. Agreed to push only if changes don't impact other functionalities.

        ii. Requested **2–3 days of QA testing** before production deployment to ensure stability.
    g. Final Decision: Team to **review internally** and **confirm deployment readiness by next call**.

5. **Demonstration – Call Module Enhancements**
    a. Showcased new functionality for **Primary and Secondary (Backup) Units** within the Call module.
    b. **Behavior Demonstrated:**
        i. Selecting a primary unit automatically restricts it from being chosen as a secondary.
        ii. Ability to modify primary/secondary assignments from the **Call Listing > All Actions > Find Units** section.
        iii. Only **one primary unit** allowed per call; multiple backups can be added.
    c. **Terminology Update:** "Secondary Unit" to be renamed to **"Backup Unit."**
    d. Operational Logic Discussion
        i. Clarified **Primary/Backup logic**:
            1. Arrival order doesn't change primary status automatically.
            2. Dispatchers can **manually reassign primary** if a more qualified unit arrives later.
            3. Example: A less experienced officer may arrive first but should not be auto-assigned as primary.
        ii. **Visual Indicators:**
            1. Proposal to **flag or color-code** primary units (e.g., yellow or "P" marker).
            2. Future enhancement idea: add **status icons** ("In Route," "On Site," "Cleared") to calls for better operational visibility.

6. **PTO/PSL Demonstration & Discussion**
    a. PTO/PSL Cap and Earnings Configuration
        i. Discussion started with the **cap earning logic**, focusing on allowing users to **set cap values for the year** without requiring manual input for hours worked or PTO earned.
        ii. It was agreed that the **global setting** would not be necessary if users can configure these values independently.
    b. UI Refinements for PTO/PSL Settings
        i. The current UI for PTO/PSL configuration needs improvement in layout and clarity.
        ii. **Proposal:**
            1. If the "Yearly" value field is blank but only "Use Cap" is defined, the interface should still display cleanly.
            2. The UI will include structured input areas for:
                a. **Cap Value**
                b. **Use Cap Value**
            3. These will be placed under the same settings section where users currently select **Daily, Weekly, or Monthly** earning durations.
        iii. The **bottom section (Remaining Settings)** will remain unchanged.
    c. Updated Field Labels
        i. At the top of the PTO/PSL configuration, the label **"Select PTO/PSL**

durations” will be changed to:

1. **“Select PTO/PSL Earning Durations”**.

ii. A new field will be added next to it:

1. **“Select PTO/PSL Cap Durations”**, allowing users to select **Daily, Weekly, Monthly, or Yearly** options for cap values.

d. **Separate Configurations for PTO and PSL**

i. Teresa raised a clarification point on whether companies might **use PTO and PSL separately**.

ii. Tom confirmed that:

1. **Patrol officers** currently have PTO, which can be used flexibly as **sick days, vacation, or cash-out** hours.
2. **Standing guards**, however, only have **PSL (Paid Sick Leave)**, which applies **only when they are scheduled and sick**.

iii. Discussion concluded that since some companies **may require both PTO and PSL** separately, the system should support **independent configurations** for each.

iv. Therefore, the following fields will exist **separately for PTO and PSL**:

1. **Cap Value (Earned)**
2. **Cap Value (Used)**
3. **Maximum Cap Value**

e. **System Handling When Both PTO and PSL Are Selected**

i. If both PTO and PSL are selected:

1. The system will **not duplicate shared settings unnecessarily**, but will provide **separate fields** where applicable.
2. For instance, PTO will have its own **Use Cap Value** and **Max Cap Value**, and PSL will have its own set of these fields.

f. **PTO/PSL Rollover Functionality**

i. Discussion referenced a prior email request to **allow rollover of unused PTO/PSL** to the next year.

ii. **Implementation plan shared:**

1. A **checkbox labeled “Enable Rollover”** will be added in the PTO/PSL configuration.
2. When selected, a **confirmation pop-up** will appear stating:
   a. “Enabling rollover will allow unused PTO and PSL to carry over to the next year. Do you want to enable this option?”
3. On selecting **Yes**, the system will automatically carry over unused balances.

iii. This logic applies to both PTO and PSL independently.

g. **Understanding “Use Cap” vs “Earn Cap”**

i. **Clarification:**

1. *Earn Cap* determines how much an employee can **accumulate/earn** as PTO or PSL.
2. *Use Cap* defines how much of the earned balance can be **utilized within a year**.

ii. Even if an employee reaches the **use cap**, they will **continue earning** PTO/PSL hours; however, they cannot use hours beyond their use cap in that year.

iii. Example discussed:
    1. If the **use cap** is 48 hours, and an employee earns 60 hours during the year — they can use only 48, while the remaining 12 can **roll over** to the next year.

iv. **Rollover Behavior:**
    1. If rollover is enabled, the remaining hours (e.g., 20 from previous year) automatically appear as available on January 1.
    2. For *"use-it-or-lose-it"* companies, unused hours are forfeited, and the balance resets to zero at the start of a new period.

h. PTO vs PSL Cap Handling

i. Discussion about whether **PTO and PSL** should have **separate rollover and cap configurations.**

ii. Teresa confirmed PTO typically allows rollover; PSL often rolls over completely, but legal restrictions may apply.

iii. Tom noted an **option should be provided** for admins to configure these independently.

iv. **Decision:**
    1. PTO and PSL to be **handled as separate entities**, each having its own:
        a. Earn Cap Value
        b. Use Cap Value
        c. Rollover Option

i. Employee Profile View – Leave Balance Display

i. Objective:
    1. Employees should clearly view:
        a. Total hours **earned**
        b. Hours **used**
        c. Hours **remaining**

ii. Discussion about calculation logic:
    1. Based on configured earning rate (e.g., 1 hour of PTO per 8 hours worked).
    2. Example: 40 hours worked = 5 hours of PTO earned.

iii. Display should dynamically reflect based on system calculations configured for PTO/PSL duration.

j. Use Cap Visibility and Representation

i. The **use cap displayed** in the employee profile should represent the **annual limit**, not the daily cap.

ii. Daily cap restrictions (e.g., max 8 hours/day) will continue to apply separately.

iii. Recommendation:
    1. Display only essential metrics for clarity:
        a. **Total Earned**
        b. **Used Hours**
        c. **Remaining Hours**
        d. **Yearly Use Cap**

iv. Purpose: reduce employee confusion and limit unnecessary PTO requests once the cap is reached.

k. UI/UX Discussion

i. Teresa noted that while all values are important, the **layout on mobile** needs improvement to maintain readability.

ii. Current data representation appears **too dense** on smaller screens.
iii. Suggestion:
    1. Adopt a **tabular or segmented display** for better visibility.
    2. Ensure UI responsiveness for mobile app viewing.
iv. **Action:** Team to rework design for better **mobile-friendly presentation** while retaining all key data points.

l. Current Time-Off Request Flow Explanation

i. Employees will see their **remaining PTO/PSL hours** in the profile.
ii. They can request time off and choose whether the hours should come from PTO or PSL.
iii. Duration is currently auto-calculated based on selected date range and hours.

m. Issue Raised – Auto-Calculating Hours

i. Teresa highlighted concerns:
    1. Auto-generation of total hours is not ideal.
    2. Example problem:
        a. If someone requests **3 days off**, the system should not automatically assign **24 hours**.
        b. Employees may want:
            i. Only **1 day paid (8 hours)**
            ii. And remaining days unpaid
    3. **Preferred Behavior:**
        a. The field **"Hours Requested" should be manual**, allowing employees to enter the exact number of hours they want paid.

n. Recommendation (Tom): Split Mixed Requests

i. Instead of mixing PTO + unpaid in a single request with notes:
    1. Employees should submit **separate requests**:
        a. Request 1 → 2 days PTO
        b. Request 2 → 2 days unpaid
ii. This avoids confusion and errors in Leave Management.

o. Need to Change UI Labels

i. Teresa's feedback:
    1. "Leave Type" label is incorrect for this screen.
    2. Replace with:
        a. "Request to Use (PTO / PSL)"
    3. Reason:
        a. Employees will not request unpaid time off from this screen.
        b. This screen is specifically for **PTO/PSL usage**.

p. Workflow Clarification – How It Should Actually Work

i. The current screen should *not* create a full Day-Off Request
    1. Instead, this screen should **only handle PTO/PSL usage (cash-out or paid hours)**.
ii. Requesting time off and requesting PTO/PSL hours should be two different actions
    1. Time-Off Request (Leave Request Portal):
        a. Asking for days off

b. Approved/Rejected by manager
c. Could be unpaid
2. PTO/PSL Usage Request (This Screen):
a. Cash-out PTO/PSL
b. Apply paid hours for already approved days off
c. Employees may use PTO while still working (allowed in many companies)
iii. Final Consensus
1. **Completely separate the two workflows**:
a. **Time-Off Request** (Days Off)
b. **PTO/PSL Cash-Out / Paid Hours Request**

q. **Technical Clarification Requested by Dev**
i. Scenario:
1. Employee selects **Dec 12 → Dec 13** (2 days)
2. But enters **8 hours** only
ii. Question:
1. Should leave management treat this as **1 day paid**, 2 days off, or something else?
iii. Outcome of discussion:
1. This confusion occurs because both workflows are mixed.
2. Once separated:
a. **Paid hours requested (PTO/PSL)** will be handled independently
b. Leave management will process time off separately
iv. This eliminates ambiguity in how the system should calculate full or partial paid days.

r. **Final Decisions**
i. **Fully Separate the Two Features(**These will no longer overlap.**)**
1. Time-Off Requests (leave portal)
2. Request to Use PTO/PSL (cash-out/paid hours)
ii. **Rename the Button and Field**
1. New button title on profile screen:
a. **"Request to Use PTO/PSL"**
2. No "Request Time Off" button on this screen.
3. No "Leave Type" dropdown.
iii. **Hours Entered Should Be Manual**
1. The system must **not auto-calculate hours** based on date/time.
2. Employees enter hours manually.
iv. **PTO and PSL Requests Stay in the Same Section**
1. One screen for requesting:
a. PTO hours
b. PSL hours
2. But must **not** imply cash-out for PSL
3. UI must avoid confusion — label must be neutral (e.g., **Request to Use PTO/PSL**)
v. **Leave Management Integration**
1. PTO/PSL usage reflected in leave management only after backend implementation.
2. PTO/PSL usage request should appear in:

a. Timesheet
b. Payroll reports

s. **Cash-Out Model – Date Requirement Debate**
   i. **Team's Attempted Flow:**
      1. The system currently requires **selecting a date range** for cash-out.
      2. Duration auto-calculates based on selected days/hours.
   ii. **Client Clarification:**
      1. **Cash-out requests should NOT involve dates by default.**
      2. Employees are simply requesting **hours**, not days off.
   iii. **Two Different Concepts:**
      1. **Requesting Time Off (Days Off)**
         a. Should remain under the **Leave Request** module
         b. Used for requesting 1 or more days off
         c. Impacts schedule
      2. **Requesting PTO/PSL Cash-Out (Hours Only)**
         a. Should only involve requesting **paid hours**
         b. Does NOT indicate employee is taking time off
         c. Should not remove them from the schedule
   iv. **However… for payroll automation:**
      1. Teresa explained that **dates help align PTO/PSL cash-out to timesheet date ranges**, making payroll processing easier.
      2. Example:
         a. Adding PTO on the timesheet for a specific date (e.g., Dec 12 → 10 hours PTO)
         b. Allows payroll to automatically identify and pay out those hours
   v. **Remaining Conflict:**
      1. What if an employee already worked the day but wants to cash out PTO on a different date?
      2. No natural date exists.
   vi. **Final Temporary Understanding:**
      1. If dates are required for timesheet mapping, they may be allowed.
      2. But they **must not** behave like time-off requests.
      3. They must be used **only for timesheet alignment**, not for scheduling.

t. **Timesheet Alignment Concerns**
   i. Client asked:
      1. How will the system map PTO/PSL hours to timesheets automatically?
      2. How do we avoid manual checks for who used PTO?
   ii. **Current thinking:**
      1. PTO/PSL cash-out becomes a **line item** on the timesheet for the selected date.
      2. A note can be added for employee reference if needed.

u. **Removing "Time-Off Request" Access from the Cash-Out Section**
   i. It was noted that the current screen allowed:
      1. Time-off request

        2. PTO/PSL cash-out
    ii. **Decision:**
        1. These must be **fully separated**.
        2. Cash-out should **not** trigger time-off logic.

v. **Admin Employee Profile – PTO/PSL Visibility**
    i. **Current Demo Suggested:**
        1. Adding an extra column for PTO/PSL in admin profile.
    ii. **Final Agreement:**
        1. **Do NOT** display an additional column.
        2. Admin should access PTO/PSL bank from the existing profile view.
    iii. **Admin abilities:**
        1. Admin should be able to **apply PTO/PSL** on behalf of the employee from this screen.
        2. Remaining bank should auto-update.

w. **Permission Requirements**
    i. **Current:**
        1. Dispatchers have permission to view profiles.
    ii. **Issue:**
        1. Dispatchers should **not** be able to apply PTO/PSL for employees.
    iii. **Final Decision:**
        1. **Separate permission** required:
            a. *View Employee Profile*
            b. *Apply PTO/PSL for Employee*

x. **Payroll Allowance Calculation – Clarification**
    i. **Client Explanation:**
        1. Employees have:
            a. Base rate (e.g., $10/hr)
            b. Phone allowance ($1/hr)
            c. Uniform allowance ($1/hr)
        2. Thus total hourly rate = $12/hr.
        3. Client expected PTO to payout at the **full rate**, including allowances.
    ii. **Compliance Clarification:**
        1. **Paying allowances for PTO/PSL is not allowed under IRS rules.**
        2. Allowances are considered reimbursements for work performed.
        3. If an employee doesn't work, reimbursement cannot be issued.
    iii. **Final Understanding:**
        1. PTO/PSL cash-out should be paid at base rate only.
        2. Allowances must not be included.
    iv. The client acknowledged this and agreed to update their internal process.

y. **Decisions & Agreements**
    i. **Cash-Out Request Flow**
        1. PTO/PSL cash-out = request **hours**, not days.
        2. Dates may be captured only for **timesheet alignment**.
        3. Cash-out will **not** affect schedule or trigger a leave request.

- ii. **UI Separation**
    1. Remove time-off request from the cash-out workflow.
    2. Cash-out remains a standalone action.
- iii. **Admin View**
    1. No extra PTO/PSL column.
    2. PTO/PSL bank and actions accessible from existing employee profile view.
- iv. **Permissions**
    1. New permission: **Apply PTO/PSL**
    2. Viewing profile will not allow applying PTO/PSL.
- v. **Payroll**
    1. PTO/PSL is paid at base rate only.
    2. Allowances must not be included.
    3. The timesheet will show PTO/PSL as separate line items.

z. **PTO / PSL Allowance & Pay Rate Discussion**

- i. **Clarification on Allowances**
    1. It was discussed that PTO/PSL payments should **not include any allowances** such as:
        - a. Phone allowance
        - b. Uniform allowance
        - c. Technical allowance
    2. These allowances are *not* part of the base pay and should not be combined into a single "hourly rate" for PTO calculation.
- ii. **Reasoning from Client Side**
    1. Historically, PTO/PSL had **always been paid on the base rate only**, and the client confirmed they have been following this same approach.
    2. Allowances are given only when the employee works; hence including them in PTO would cause an issue during audits.
- iii. **Audit & Compliance Concern**
    1. If PTO is paid with allowances included:
        - a. Auditors may assume the employee's *actual pay rate* is higher.
        - b. This may cause:
            - i. Violations
            - ii. Additional taxes
            - iii. Penalties
    2. Therefore, the approach of excluding allowances is legally compliant.
- iv. **Final Agreement**
    1. PTO/PSL will always be paid at base hourly rate only.
    2. Allowances must not be added or merged into an hourly rate for PTO purposes.

aa. **Payroll Report Requirement**

- i. **Request**
    1. Teresa requested an enhancement for the upcoming payroll report:
        - a. PTO/PSL usage must appear as a **separate line item**.
        - b. The report must clearly show:

i. Employee name
ii. PTO/PSL type
iii. Hours being paid
iv. Pay rate (base)

ii. **Purpose**
1. This will ensure:
a. Accurate payout
b. Easy verification
c. Clear payroll processing
d. Audit alignment

iii. **Action Item**
1. Add a dedicated PTO/PSL column in the payroll report.

bb. **Production Deployment Update**

i. **Deployment Timing**
1. Scheduled production build update:
a. **Date:** Tomorrow
b. **Updated Time: 6 AM PST** (adjusted due to daylight saving)

ii. **Changes in Build**
1. Fixes related to:
a. Scheduling issues
b. Site-level bugs
2. Additional enhancements and minor updates

iii. **Communication Plan**
1. Team will notify on Slack:
a. Before starting the build
b. After the successful deployment

iv. **Impact**
1. The deployment will affect **all client instances**.

v. **Action Item**
1. Dev team to proceed with the 6 AM PST deployment
2. Notify Teresa and team before & after deployment

cc. **Mobile App (TestFlight) Discussion**

i. **Feedback**
1. Teresa downloaded the TestFlight build.
2. However:
a. Some tickets were unclear
b. Some functionalities (vehicle inspection, ending shifts, etc.) are not testable from her end

ii. **Requirement**
1. She requested a clearer list of TestFlight items.

iii. **Action Item**
1. The development team will **resend the release notes** with clear ticket details.
2. Items difficult for Teresa to test will be validated internally.