

Minutes of Meeting

Date and Time	10 June 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	Client	Citywide

Attendees (Internal)

- Rupesh
- Kuldeep
- Jaspreet
- Gurpreet
- Sangita
- Vishesh
- Kapil
- Amit

Attendees (Client Side)

- Tom, Teresa, Randy, Matt

Agenda

- **Discussions on the following:**
 - Agent Schedule Confirmation Process
 - Schedule Notification and Acknowledgment
 - Shift Rejection and Flexibility
 - Handling Shift Changes and Leave Requests
 - Alerts for No-Show or Unacknowledged Shifts
 - Notifications & Acknowledgement of Schedules
 - Notification Preferences & Alerts
 - Handling Notifications for Supervisors and Departments
 - Admin Schedule and Role Mapping for Dispatchers
 - Handling Shift Leads & General Email Notifications
 - Temporary and Permanent Solutions for Notification Handling
 - Issues with Notification Configuration
 - Workaround for Notifications
 - Admin Site & Shift Assignments
 - Workaround for Open Shift Handling
 - Sorting and Filtering Options
 - Workaround for Sorting & Filtering
 - Overtime and Regular Hours Display
 - Workaround for Hours Display
 - Multiple Open Shift Assignments

- Workaround for Open Shift Assignment
- Shift Bidding & First-Come, First-Serve vs. Admin Approval
- Workaround for Shift Bidding Approval
- Shift Acceptance and Rejection Process
- Workaround for Shift Acceptance Interface
- Shift Bidding and Filtering
- Workaround for Shift Bidding Tracking
- Quick Action for Shift Requests
- Workaround for Shift Bid Notifications
- Selecting Agents Based on Pay Rate
- Workaround for Pay Rate Selection
- Handling Conflicts in Shift Assignments
- Workaround for Shift Conflicts
- Tracking Shift Bidding History
- Workaround for Shift Bidding History
- Notifications for Open Shift Requests
- Workaround for Shift Notification Actions
- Notification Type for Late to Work Alerts
- Workaround for Late Notification
- Testing the Late Notification Error
- Workaround for Late Notification Error
- Timeline for Implementing Changes
- Workaround for Development Timeline
- Error Replication for Site Contact Deletion
- Workaround for Site Contact Deletion Error
- Tracking Site Conversion Status
- Workaround for Site Conversion
- Review of Closed Server and Admin Panel Features
- Workaround for Review Process
- Next Steps and Planning for Upcoming Meetings
- Workaround for Meeting Agenda
- Late Shift Notification Issue (Final Clarification)
- Workaround for Late Shift Notification

The following things are discussed:

1. Agent Schedule Confirmation Process:

- a. The current system requires agents to confirm each shift individually before starting.

- b. Teresa suggested bulk confirmation or a pop-up notification for new schedules for ease of use.
- c. Confirmation should be possible up to the last minute before or during shift start without blocking shift start.
- d. If schedules are updated last minute, agents should still receive a notification and be able to confirm or start the shift.

2. Schedule Notification and Acknowledgment:

- a. Tom explained standard industry practice: weekly schedule published (e.g., Friday for next week's shifts).
- b. Employees receive notification/email to acknowledge schedule receipt.
- c. Any mid-week schedule changes should also trigger notifications.
- d. Agents must be able to view and acknowledge schedules without blocking shift start.
- e. Pop-ups for acknowledgment should not block visibility of the schedule.

3. Shift Rejection and Flexibility:

- a. The dev team asked if agents can reject schedules; Tom confirmed rejection should be allowed for individual or multiple shifts.
- b. Teresa, concerned that allowing partial rejection could lead to misuse; suggested either accept all or reject all with a note.
- c. Tom recommended allowing selective rejection with reasons provided for each rejected shift to avoid confusion.

4. Handling Shift Changes and Leave Requests:

- a. After confirmation, shifts cannot be canceled without a formal leave request.
- b. Discrepancies or issues with scheduling to be handled via leave requests or manual communication.

5. Alerts for No-Show or Unacknowledged Shifts:

- a. Tom highlighted the need for alerts to dispatch/admin if an agent hasn't logged in for a shift past start time.
- b. Alerts should be controlled to avoid notification overload.
- c. This will help in timely follow-ups for missing or late agents.

6. Notifications & Acknowledgement of Schedules:

- a. Tom is concerned about how to track if an employee has acknowledged or accepted their schedule. Teresa suggests using a double checkmark for acknowledgment, and Tom proposes an X to indicate a rejection. He doesn't want rejected schedules to disappear, but rather show an X and allow the reason for rejection to pop up when hovered over. The group agrees that the X should be visible and the rejection reason accessible on hover.

7. Notification Preferences & Alerts:

- a. Tom suggests that the system should be able to show an X for rejected schedules, but without sending notifications to dispatchers about rejections by default. He prefers notifications to be an option in the settings that can be turned on if needed. Teresa supports this, and The dev team confirms that it can be set up as an option in the notification settings.

8. Handling Notifications for Supervisors and Departments:

- a. Teresa shares the issue of dispatchers receiving too many notifications when many agents miss assignments. To fix this, The dev team mentions that the system could allow for departmental setup. Notifications could be sent to a department head or supervisor instead of individual dispatchers, reducing notification overload.

9. Admin Schedule and Role Mapping for Dispatchers:

- a. Tom proposes creating an "admin schedule" where dispatchers, supervisors, and other admin roles are listed. This would allow for role-based notifications to be mapped to specific dispatchers or supervisors. This is important for handling multiple dispatchers and sharing alerts effectively. The dev team confirms that such a setup can be implemented.

10. Handling Shift Leads & General Email Notifications:

- a. Teresa suggests having shift leads indicated on the schedule, and Tom supports this idea, saying it could be managed through the admin schedule. Tom also stresses the need for a general email address for dispatch notifications, so alerts are not sent to individuals but instead to a shared dispatch email, which any dispatcher on duty can check. This would be a temporary solution until a more permanent one is developed.

11. Temporary and Permanent Solutions for Notification Handling:

- a. Tom explains that a temporary fix is to use a general dispatch email for all alerts. For the permanent fix, the system should allow creating an "admin site" where roles such as dispatchers and supervisors are scheduled, and notifications are mapped accordingly.

12. Issues with Notification Configuration:

- a. The dev team raises concerns about the number of notifications being sent for various events (payroll, late shifts, etc.) and the potential impact on costs. Tom suggests adding a field for general emails, so that notifications can go to a shared inbox, which would avoid overloading specific individuals with alerts.

13. Workaround for Notifications:

- a. Tom confirms that the workaround for now would be adding a field for general emails in the notification settings, allowing notifications to go to a shared email address rather than individual employees.

14. Admin Site & Shift Assignments:

- a. Teresa raises a question about the need for distinguishing between publishing open shifts and allowing shift bidding. She clarifies that open shifts should either be available to everyone or sent only to specific individuals for bidding. The dev team and Tom agree that the system should allow for both options: sending open shifts to everyone or sending them to a select group based on filtering criteria.

15. Workaround for Open Shift Handling:

- a. Tom suggests that the system should include a checkbox to allow either "first-come, first-serve" assignments or "admin approval" for shift bidding. This would provide admins with the flexibility to choose the method of assigning open shifts based on the needs of the situation.

16. Sorting and Filtering Options:

- a. Teresa requests additional sorting features to help prioritize candidates for open shifts. Specifically, she asks for sorting by pay rate, hours worked, and qualifications, allowing the system to select the most appropriate candidates based on a combination of factors. The team agrees on the need for this functionality to improve the candidate selection process.

17. Workaround for Sorting & Filtering:

- a. Tom confirms that the system will implement multi-level sorting, such as sorting by pay rate first, then by overtime hours, to give admins more control

in their selection process. The team supports this approach to enhance the efficiency of assigning shifts.

18. Overtime and Regular Hours Display:

- a. Teresa emphasizes the need for the system to differentiate between scheduled regular hours, overtime, and double time. She explains that showing only scheduled hours (not hours worked) would make the system clearer and more manageable. The dev team agrees to adjust the design to display only scheduled hours for clarity.

19. Workaround for Hours Display:

- a. Tom suggests simplifying the display by showing only scheduled hours for regular time, overtime, and double time, avoiding confusion over worked hours. The team aligns on this approach, confirming it will help streamline shift assignments.

20. Multiple Open Shift Assignments:

- a. The dev team asks whether it's feasible to send multiple open shifts in one go or if they should be assigned individually. Teresa prefers sending shifts one at a time to avoid over-assigning or creating confusion with overtime rules. The team agrees that sending individual shifts would be the most efficient method.

21. Workaround for Open Shift Assignment:

- a. Tom supports the decision to send shifts one at a time to ensure that employees don't overbook themselves, especially when considering overtime restrictions. This approach would also help maintain clarity for both the admin and employees.

22. Shift Bidding & First-Come, First-Serve vs. Admin Approval:

- a. The dev team questions whether shifts should be assigned based on a first-come, first-serve basis or require admin approval. Teresa suggests first-come, first-serve for fairness, while Tom proposes offering both options through a checkbox that would allow admins to choose the method for each shift.

23. Workaround for Shift Bidding Approval:

- a. Tom confirms that the system will include checkboxes for "first-come, first-serve" and "admin approval." This way, admins can select the most appropriate method based on the nature of the shift or the team's requirements.

24. Shift Acceptance and Rejection Process:

- a. The dev team asks if accepted shifts should be shown in the alert or if another box or option is needed. Tom clarifies that the alert will show which agents accepted the shift, and the dispatcher will then choose who to assign it to.

25. Workaround for Shift Acceptance Interface:

- a. The dev team suggests adding an "accepted" button to the OpenShift interface. This would allow the dispatcher to easily accept or reject the shifts based on the agents who have accepted the bid. Tom agrees this would work, but there may need to be a filter applied after the initial request is sent.

26. Shift Bidding and Filtering:

- a. The team discusses the need for real-time tracking when multiple agents accept a shift. The dev team points out that once agents accept, a filter must be reapplied to ensure the system reflects the new available candidates. The

dispatcher may need to open the modal again to confirm the agents' status.

27. Workaround for Shift Bidding Tracking:

- a. Tom suggests that a filter needs to be applied each time an agent accepts a shift. This will ensure the dispatcher can view the most accurate data when scheduling, which would also help prevent over-assigning shifts.

28. Quick Action for Shift Requests:

- a. The team considers providing a quick action button for dispatchers on the dashboard, which would notify them of bid requests in real-time. This would allow dispatchers to accept or reject bids from any screen, not just the scheduling side.

29. Workaround for Shift Bid Notifications:

- a. Tom proposes implementing real-time notifications on the dispatcher's dashboard so that they can quickly accept or reject shift requests. This would streamline the scheduling process and make it more efficient.

30. Selecting Agents Based on Pay Rate:

- a. The dev team asks how to select agents based on their pay rate, specifically targeting those with lower pay rates or those not eligible for overtime or double time. The organizer confirms that the system will track pay rates and provide this data during the selection process.

31. Workaround for Pay Rate Selection:

- a. The team agrees that the system will show pay rates when agents accept the shift, allowing dispatchers to choose agents based on their pay rates and eligibility for overtime or double time.

32. Handling Conflicts in Shift Assignments:

- a. The dev team presents a scenario where an agent has been assigned a shift but also bids for the same shift. She asks if the system will prevent that agent from being assigned or bidding on the shift due to a conflict. Tom explains that if the agent is already assigned to a shift, they will not be considered for the open shift.

33. Workaround for Shift Conflicts:

- a. Tom clarifies that if an agent is already scheduled, the system will not show them as available for open shifts. If the dispatcher tries to assign them, the system will provide an error message stating the conflict.

34. Tracking Shift Bidding History:

- a. The dev team asks if the system should keep a history of the shift bidding transactions, such as who accepted or declined the shift. Teresa suggests that this information should be available in the employee's work history to track declined shifts, which could be helpful in case of complaints.

35. Workaround for Shift Bidding History:

- a. Tom agrees that the system should show both accepted and declined shifts in the employee profile. However, for scheduling purposes, the dispatcher would only need to see accepted shifts to expedite the scheduling process.

36. Notifications for Open Shift Requests:

- a. The team discusses how shift requests are currently notified to agents: via system notifications, email, and mobile push notifications. The dev team asks if agents should be able to accept or decline shifts directly from the email without logging into the system. Tom suggests that it would be better if the email or text contained a link that redirected the agent to the system to accept or decline the shift.

37. Workaround for Shift Notification Actions:

- a. Tom confirms that agents should be redirected to the system through a link in the email or text notification, where they can then log in and accept or reject the shift. This ensures the system captures their response accurately.

38. Notification Type for Late to Work Alerts:

- a. Teresa mentions an issue with the "late to work" notification. One of her employees received an email saying they were late, but it was sent 15 minutes before the shift started, whereas it should trigger 15 minutes after the shift begins. The organizer confirms the system currently sends notifications 15 minutes after the shift starts, and there's an additional notification for one hour after the shift starts if the agent hasn't logged in.

39. Workaround for Late Notification:

- a. The system's notifications are set to trigger when the agent doesn't log in 15 minutes after the shift starts, with another notification sent after one hour. The organizer will test the system to confirm this behavior.

40. Testing the Late Notification Error:

- a. Tom asks Teresa to have the employee send the late notification alert so the team can pinpoint exactly when and who the issue occurred with. Teresa agrees to follow up on this.

41. Workaround for Late Notification Error:

- a. The organizer asks Teresa to send the employee's notification for further investigation, and they plan to review and test it to ensure the system works as expected.

42. Timeline for Implementing Changes:

- a. Tom inquires about the timeline for implementing the recent changes discussed for the scheduling system. Organizer confirms that the new features will be included in the next build, planned for release on June 21st, 2025.

43. Workaround for Development Timeline:

- a. Organizer sets a deadline for the next build to be completed by June 21st, and the team will target that date to include all requested features, including the OpenShift sending and acceptance process.

44. Error Replication for Site Contact Deletion:

- a. The dev team checks in with Teresa about an error she encountered while deleting site contact information. Teresa confirms the error occurred earlier, but she was able to resolve it, and the system worked eventually.

45. Workaround for Site Contact Deletion Error:

- a. The dev team tries to replicate the error but does not encounter the issue. Teresa will let the team know if it happens again. The dev team suggests that the error may have been due to an issue with deleting site contacts, and they plan to test it further.

46. Tracking Site Conversion Status:

- a. The dev team updates Tom about the conversion status for various components, including ranks, activity codes, and service types. The conversion is progressing, and once the remaining tasks are completed, the sites will be pushed to production.

47. Workaround for Site Conversion:

- a. The dev team confirms that the team is progressing with the conversion and will push the sites to production once everything is completed.

48. Review of Closed Server and Admin Panel Features:

- a. Organizer reminds Tom about an email sent regarding the closed server and a feature list for Phase 1, which includes timelines. Tom admits to not reviewing it yet but saves it for future reference when discussing the closed server with clients. Teresa is in charge of the timeline and fixes.

49. Workaround for Review Process:

- a. Tom acknowledges the email and confirms Teresa will handle the timelines and fixes for the project. Teresa will also be responsible for implementing the plans for Phase 2 and drafting Phases 3 and 4.

50. Next Steps and Planning for Upcoming Meetings:

- a. Organizer outlines the agenda for the next meeting, including feedback on the CHS admin panel, any questions regarding features in the document, and the server upgrade discussion related to Kubernetes.

51. Workaround for Meeting Agenda:

- a. Organizer clarifies that tomorrow's discussion will focus on the CHS admin panel and server upgrades for Kubernetes, followed by discussions on the development of future phases.

52. Late Shift Notification Issue (Final Clarification):

- a. Teresa confirms that an employee received a late shift notification 15 minutes before the shift started, which is an issue. The organizer acknowledges this and will review the problem further.

53. Workaround for Late Shift Notification:

- a. The issue with late shift notifications being sent prematurely is confirmed. The organizer will check this part to make sure the system is working as intended.

