

Minutes of Meeting

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| Date and Time | 18 June 2025 09:00 PST | Meeting type | Zoom |
| Organiser | Mr. Rupesh | Client | Citywide |

Attendees (Internal)

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

Attendees (Client Side)

- Tom, Teresa, Matt

Agenda

- **Discussions on the following:**
 - Payroll Demo
 - Scheduling Demo

The following things are discussed:

1. Payroll Demo

a. Payroll Demo:

- Email Notification:** System will now send an email when payroll is generated. The template includes officer name and date range.
- Department Filter:** Introduced multi-select department filter for payroll listing.
- CSV Export:** Added functionality to export selected payroll data as CSV. Fields include:
 1. Officer details
 2. SSN
 3. Hours (Regular, OT, Holiday, Discrepancy)
 4. Salary based on pay rate
 5. Shift-based hours and allowance details

b. Feedback & Discussion:

i. Tom's Clarification:

1. Officers should not receive payroll reports as payroll data is not final (preliminary figures).
2. Final payroll goes to the payroll company for processing (taxes, deductions, etc.).

ii. Data Structure Discussion:

1. Teresa inquired about allowances and their durations (e.g., food allowance hours).
2. Kuldeep clarified:
 - a. Data shown is real and pulled from the system (not dummy).
 - b. Allowances match working hours (e.g., regular hours = allowance hours if applicable).
 - c. Mapping logic explained: if a person has no applicable allowance, it shows zero.

iii. Payroll Source:

1. Data is derived from clock-in/clock-out times (real-time), not just schedules.

iv. Testing Plan:

1. To verify the accuracy, Tom suggested uploading actual payroll data and cross-verifying with existing systems (eTime and Finita).
2. Teresa will provide a data dump for import and testing.

v. Data Upload Support:

1. Kuldeep confirmed Ditek will provide an Excel template for bulk upload via script.
2. No manual entry required by the client.
3. Template will include fields for:
 - a. Employee name
 - b. Base pay rate
 - c. Allowances
4. Teresa to share the dump data file.
5. Team to fill out required fields in Excel template.

2. Scheduling Demo:

a. Demonstrated workflow:

- i. Creating and sending open shifts
- ii. Officer view: ability to accept or reject a shift
- iii. Officers must provide a reason when rejecting
- iv. Status updates shown in history tab

b. Shift Qualification Filters

- i. Experience
- ii. Permit qualifications (e.g., guard card, driving license)
- iii. No overtime cost (daily/weekly/monthly)
- iv. Not already scheduled, no double time
- v. Officers selected based on filter, then shift is sent
- vi. Officers can view and respond (accept/reject) to the open shifts on their portal
- vii. Admin can assign accepted shifts to officers

- viii. History logs include: who sent the shift, officer name, and response status

c. Mass Acceptance of Shifts:

- i. Officers currently must accept/reject each shift individually.
- ii. A feature for mass acceptance/rejection is under development. Backend is complete; frontend expected to be ready by tomorrow.

d. Color Coding:

- i. **Yellow:** Unconfirmed open shifts
- ii. **Blue:** Confirmed/assigned shifts
- iii. Tom requested a **banner/notification** to remind officers to confirm/reject shifts.

e. Officer Confirmation for Regular Schedules:

- i. Discussion about guards confirming **entire weekly schedules**.
- ii. A feature for confirming entire week's shifts in one action is in development.

f. Push Notifications:

- i. Officers receive:
 - 1. Push notification (if using mobile app)
 - 2. Email
 - 3. Yellow banner in schedule view
- ii. Currently **default**; customizable notifications setting is planned.

g. Auto vs Manual Assignment:

- i. Requested option for "**first-come, first-serve**" auto-assign for open shifts vs manual assignment.
- ii. Jaspreet confirmed this is **under implementation**.

h. Additional Filters Needed (requested by Tom):

- i. Employee type (Full-time, Part-time, Subcontractor)
- ii. Union member flag
- iii. Sort-by **seniority** (based on hire date)

i. Action Items:

- i. Teresa to raise tickets for:
 - 1. Site qualification section
 - 2. Employee qualification beyond permits (e.g., CPR, K-9, crisis intervention)
- ii. Kuldeep's team will capture the call recording and raise internal tickets accordingly.

j. Employee Termination Impact on Scheduling

- i. If an employee is terminated, future scheduled shifts are **automatically converted to open shifts**.
- ii. Tom noted:
 - 1. An officer **cannot be terminated mid-shift** without clocking out.
 - 2. Suggested allowing admin to **force-checkout** an officer and log the checkout time for compliance.
- iii. Sangita confirmed the shift auto-removal post-termination is functional on staging.

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