Minutes of Meeting

Date and Time	08 September 2025 09:00 PST	**Meeting type**	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
- Rupesh   - Kuldeep   - Jaspreet   - Sangita   - Vishesh   - Ravinder   - Rahul   - Sai   - Ajay   - Gurpreet   - Kapil   - Amit
Attendees (Client Side)
Tom, Teresa, Matt

Agenda
Discussions on the following: - QuickBooks Payroll Integration Discussion   - Additional Caller   - PTO & Leave Management   - Admin/Office Personnel Service Type   - Help & Support Request Flow (To/CC Selection)

The following things are discussed:

1. **QuickBooks Payroll Integration Discussion**
    a. **Current Findings (R&D):**
        i. Able to **create and update employees** with limited details (SSN, name, employee number, date of birth, hire date, active status, phone, email, address).
        ii. Unable to retrieve or sync **pay rate, hours, or payroll-specific data**.
        iii. Ticket raised with QuickBooks to confirm if **payroll APIs are available** (documentation checked 5–6 months ago showed only invoicing APIs).
    b. **Client Input:**
        i. For payroll, I need to sync **regular hours, overtime hours, and daily breakdowns**.
        ii. Integration should be **bi-directional**:
            1. Employee creation in CommandHub should reflect in QuickBooks, and vice versa.
            2. Payroll hours should be transferable across systems.
        iii. **Goal:** Minimize duplicate data entry and streamline client operations.
    c. **ADP Payroll Integration**
        i. **Status:**
            1. ADP provides REST APIs → need to explore data fetch and modify capabilities.
            2. Next step: Create a **test account** or use existing ADP accounts (Citywide/cleaning side may have one).
        ii. **Client Requirement:**
            1. Since **60% of upcoming clients use ADP**, integration is critical.
            2. Avoid client situations where API support is promised but not working.
        iii. **Action Item:**
            1. Set up an ADP sandbox/test account.
            2. Explore full payroll data requirements (taxes, withholdings, pay rate, deductions).
            3. Implement integration accordingly.
    d. **Employee Profile Enhancements (CommandHub → Cabana Module)**
        i. **Required Fields to be Added:**
            1. **W2 Form**
            2. **I9 Form**
            3. **Deductions**
        ii. **Purpose:** Ensure compatibility with ADP/QuickBooks payroll structures.
        iii. **Approach:** Review ADP/QuickBooks employee profile pages, identify missing fields, and add them into Cabana.
    e. **General Considerations**
        i. **Client Vision:**
            1. Single-point data entry in CommandHub → Sync across

payroll platforms.
2. Reduce dependency on multiple tools; provide seamless API-driven data exchange.

ii. **Adaptability:**
1. The system should support both **QuickBooks and ADP** integrations, depending on client preference.
2. Employee profile in CommandHub to be **comprehensive enough** for any third-party payroll provider.

f. **Decision Made:**
i. QuickBooks payroll APIs still uncertain → awaiting ticket response from QuickBooks.
ii. ADP payroll APIs to be prioritized due to wider client adoption.
iii. Employee profile in Cabana to be updated with **W2, I9, deductions** and any additional payroll-required fields.
iv. Long-term goal: Seamless **bi-directional sync** for employee profiles and payroll hours.

2. **Additional Caller:**
a. **Feature Request:** Ability to add multiple callers (reporting parties – RPs) for a single incident.
b. **Functionality Requirements:**
i. Option under **Assigned Units → Add Caller** (Caller #1, Caller #2, Caller #3, etc.).
ii. Each caller labeled sequentially (Caller 1, Caller 2, …).
iii. Caller details (name, phone, address, notes) captured.
iv. Additional callers appear in **call history** and on **client PDF reports**.
v. No new workflows/reports generated; only linked to existing calls.
vi. Officers see caller lists in open calls but no other operational impact.
vii. Caller information saved as **notes** in the call record (auto-move to notes section to avoid clutter in active call screen).
viii. Should count as part of **caller history tracking**.
ix. Applicable only to **call-ins** (not radio, officer-initiated reports).

c. **Use Cases Discussed:**
i. Noise complaint with multiple neighbors reporting.
ii. Major incidents (accident, shooting) where multiple witnesses call in with different details.
iii. Primary caller noted as Caller #1, subsequent callers saved as Caller #2, Caller #3, etc.

3. **PTO & Leave Management**
a. Clarifications:
i. **Balances for PTO and ASL** should remain separate.
ii. Even with **unlimited PTO**, approvals for requests are still required.
iii. **Cash-out option** must be available for PTO.
iv. Access and approvals governed by **role-based permissions**.

4. **Admin/Office Personnel Service Type**
a. **Problem:** Currently, only patrol and stationary staff can be scheduled. Dispatchers and office staff cannot be tracked in scheduling.
b. **Solution Proposed:**
i. Introducing a new **Service Type: Office Personnel**.
ii. Sub-service types may include Dispatchers, Front Desk, Fleet

Manager, Supervisors, etc.

iii. Multiple **office sites** can be created (e.g., Dispatch Office, Corporate Office).
iv. Each office site will have **coverages** like patrol/stationary, but specifically for office staff.
v. Scheduling available for all defined office positions.
vi. Salaried staff (e.g., account managers, receptionists) may not need clock-in/out, but their schedules can be tracked.
vii. Notifications: only sent to specifically designated staff, **not all admin role users**.
viii. Site details for **Office sites** will be simplified – no need for features like post orders, site areas, site photos, or enforcement modules. Only scheduling and property access required.

c. **Decision:**
  i. Implement "Office Personnel" as a separate service type (to avoid confusion with "Admin role").
  ii. Flexible enough to support multiple office sites and coverages.
  iii. Works similar to stationary/mobile site handling.

d. **Decisions Made:**
  i. Add **multi-caller functionality** to calls (with caller notes saved and visible in reports/history).
  ii. PTO and ASL balances remain separate; PTO includes approval and cash-out features with role-based permissions.
  iii. Introduce **Office Personnel service type** to support scheduling and tracking of dispatchers, office staff, and supervisors.

5. **Help & Support Request Flow (To/CC Selection)**

a. **Problem Identified:**
  i. Officers currently can send requests to *anyone* (e.g., patrol selecting standing officers).
  ii. Duplicate fields existed: "To" and "Decision Maker/CC."

b. **Decisions:**
  i. Restrict recipients based on **predefined admin/management roles**.
  ii. Remove duplicate CC fields – use a single list of designated people.
  iii. Only individuals with **Help & Support access level** can be selected.

c. **Resolution:**
  i. Admins (e.g., Tom, Teresa, Randy) will appear in dropdowns.
  ii. Highest-ranking person in selection becomes the **default decision-maker**, but other designated people can act on it if primary is unavailable.

d. **Decision-Maker Assignment**
  i. Discussion:
    1. Concern if only the highest-ranking always becomes a decision-maker.
    2. Need flexibility for others (e.g., Randy or Teresa) to handle calls.

  ii. Agreement:
    1. When a request is submitted, the highest-ranking person may **assign a decision-maker** from the listed group.
    2. Any listed person can take ownership if they see it first.

        3. Lowest-ranking can start handling but may **escalate upwards** if needed.

e. **Department-Specific Templates**
    i. **Proposal:**
        1. Each department should have its own **help & support template** (Standing, Patrol, Dispatch, etc.).
        2. Forms/questions should be department-specific (e.g., harassment form for standing vs patrol).
    ii. **Implementation Points:**
        1. Admins create templates per department.
        2. Assigned recipients are predefined per template.
        3. Agents can **remove** specific people if conflict exists (e.g., complaint about Strube → remove Strube).
        4. Agents cannot add unrelated people from other departments.

f. **Handling Terminated Employees**
    i. **Problem:**
        1. If a decision-maker/assignee is terminated while requests remain open.
    ii. **Resolutions:**
        1. **On termination:**
            a. All active assignments automatically become **unassigned**.
            b. Notifications, access, and CC links removed immediately.
        2. **Before termination:**
            a. The system should **alert the admin** with a list of all active tasks (e.g., "Teresa has 10 open tasks").
            b. Option to **reassign tasks** before confirming termination.
        3. Unassigned tasks will appear on the dashboard for **Super Admin** to reassign.

g. **Request Editing & Reassignment (Admin Role)**
    i. **Scenario:**
        1. Admins can edit requests and change assigned To/CC.
    ii. **Decision:**
        1. Only employees with the correct **role/permission** should appear in reassignment dropdowns.
        2. If needed, admins can reassign requests to another qualified employee (e.g., reassign to Randy).
        3. A broad employee list will not be shown – only valid role-based people.

h. **Final Clarifications**
    i. **Template-Based Assignment:**
        1. Each template defines who can receive requests.
        2. Assignment is role-based, ensuring only valid people can be recipients.
    ii. **Flexibility:**
        1. Multiple admins/agents per template for coverage.

2. The primary handler can be switched dynamically.