Minutes of Meeting

Date and Time	25 November 2025 09:00 PST	**Meeting type**	Zoom
Organiser	Mr. Rupesh	**Client**	Citywide

Attendees (Internal)
• Rupesh • Kuldeep • Jaspreet • Ravinder
Attendees (Client Side)
• Teresa, Matt

Agenda
• **Discussions on the following:** ○ Purpose of the Meeting ○ PSSP Issues Reviewed ○ Discussion Points ○ Quickbooks Payroll ○ Report Submission & Approval Flow ○ Pricing Upload Sheet Issues ○ Payroll Report & Department Alignment Issues ○ KPI Discussion ○ PSSP Priorities ○ Demo Planning

The following things are discussed:

1. **Purpose of the Meeting**
    a. This meeting was held to review PSSP concerns before the scheduled discussion with Tom.
    b. Objective:
        i. Clarify the issues raised by PSSP
        ii. Validate whether the problems are system-related or user-related
        iii. Align on next steps to present accurate information to Tom
2. **PSSP Issues Reviewed**
    a. **Key Concerns Raised by PSSP:** Teresa highlighted three major concerns raised by PSSP:
        i. **Login/Logout Issues**
            1. User gets kicked out randomly
            2. Unable to add photos or save reports on the web version
            3. Issue appears inconsistent and not affecting all users
        ii. **Payroll Not Integrated with QuickBooks**
        iii. **Reports Not Being Sent Properly**
            1. Reports only sent once
            2. Client complaints received
3. **Discussion Points**
    a. **Login & Logout Issue – Root Cause Validation**
        i. The team previously shared video proof of login/logout flow working correctly.
        ii. Teresa mentioned:
            1. The issue appears specific to one user.
            2. She has already spoken to that employee.
            3. The user seems to be hesitant to learn new steps and stops immediately when any small block occurs.
            4. She needs evidence to confidently state that the problem is not from the system side.
    b. **Proposed Solution:** To verify and document actual behavior:
        i. **Team Commitment**
            1. Create **full end-to-end video** demonstrating:
                a. Shift creation
                b. Shift start
                c. Check-in / check-out
                d. Report creation
                e. Image upload
                f. Login/logout behavior
                g. Testing across:
                    i. Web version
                    ii. Mobile app
                    iii. Multiple devices
            2. Share the video + step-by-step execution notes with Teresa.
            3. Use the same user account shared earlier by Teresa to ensure reproducibility.
        ii. **Goal**
            1. Provide Teresa with:
                a. Strong evidence to confirm the system is functioning

correctly
b. Documentation she can show PSSP team
c. A basis to request PSSP user-screen recordings **if they still claim the issue persists**

c. **Possibility of Joint Call With PSSP**
    i. Jaspreet suggested arranging a direct call with the PSSP team if required.
    ii. Teresa agreed this can be done if necessary.

d. **Observations From Teresa**
    i. The issue seems isolated to one user, not system-wide.
    ii. The user is an older employee, resistant to learning new steps.
    iii. Because other issues exist on the PSSP side, they tend to assume any problem = CHS bug.
    iv. Teresa requires **proof of correct system behavior** to maintain credibility while communicating with them.

4. **Quickbooks Payroll**
    a. **QuickBooks Integration Concerns**
        i. **Integration Status & Client Feedback**
            1. Teresa shared that the client contacted QuickBooks support to understand how they integrate with CommandHub.
            2. QuickBooks informed them:
                a. CommandHub is **not listed** as an integrated vendor.
                b. They do not recognize CommandHub as an official integration partner.
            3. Teresa emphasized the need for alignment because CHS tells clients that QuickBooks integration exists, whereas currently:
                a. Only **invoicing integration** is functional.
                b. Payroll integration does *not* exist yet.
            4. Action needed: Ensure CommandHub is officially listed or restart the integration registration process if required.
    b. **Site Notes & Pricing Script**
        i. **Pricing Upload Script**
            1. Teresa requested a script for uploading service prices per site.
            2. Kuldeep confirmed:
                a. Email already sent on the same thread.
                b. Two Excel files shared:
                    i. Stationary sites
                    ii. Mobile sites
            3. Teresa will review and revert with updated files for upload.
    c. **Invoicing Through QuickBooks**
        i. **Status & Testing**
            1. Invoicing integration is ready for testing.
            2. Arizona branch setup is reportedly complete, enabling the first test run.
            3. Kuldeep confirmed:
                a. This month's invoice cycle will be executed.
                b. After invoice generation:
                    i. The team will verify output.
                    ii. Show Teresa how invoices push to QuickBooks.

iii. Demonstrate how invoices appear inside CHS.

ii. Invoice Generation Timelines

1. Invoice generation depends on **site-specific billing cycle settings** configured under Site Notes.
2. Kuldeep will share:
   a. A detailed document explaining billing cycle triggers.
   b. Exact timeline of invoice generation per configuration.

d. Request for Access to Documentation

i. Teresa requested access to the shared invoicing document.
ii. Kuldeep to provide access.

e. Payroll Concerns & Misalignment with QuickBooks

i. Current State of Payroll in CHS

1. Payroll in CHS depends on:
   a. Branch-level payroll cycle configuration.
   b. Employee base pay rate being set in the employee profile.
   c. Clock-in/clock-out data from the scheduler.
2. If an employee's base rate is missing:
   a. Payroll for that employee only will not be generated.
   b. Other employees' payrolls will still generate.

ii. Citywide Payroll Data Issues

1. Teresa observed:
   a. No payroll has been run for Citywide employees.
   b. None of the employees have pay information set under their profiles.
   c. They currently rely on Payroll Report (manual extraction of hours) instead of CHS payroll.

iii. Need for QuickBooks Payroll Alignment

1. Teresa needs clarity on:
   a. How QuickBooks handles payroll uploads.
   b. What formats or templates QuickBooks accepts.
2. Purpose:
   a. Ensure CHS export format can map cleanly to QuickBooks upload format.
   b. Even if direct integration is not available, manual workflows should be fast & aligned.

f. QuickBooks Payroll Setup Challenges

i. Sandbox Account Limitations

1. A Citywide QuickBooks sandbox account exists.
2. Payroll cannot be tested because:
   a. QuickBooks requires **tax information** before payroll operations.
   b. Tax info is missing, so payroll reports cannot be run.

ii. Proposed Solutions

1. Teresa suggested setting up proper payroll for Citywide inside QuickBooks to:
   a. Run at least one payroll report.
   b. Understand the structure QuickBooks expects.
   c. Compare it to CHS payroll export.

        d. Improve CHS data compatibility.
    2. Kuldeep agreed:
        a. They need to run payroll reports from QuickBooks.
        b. This will help understand the required import/export format.
        c. Findings can guide better alignment between CHS payroll and QuickBooks processes.

g. **Next Steps / Action Items**
  i. **CHS Team**
    1. Share access to the billing cycle/invoice generation document.
    2. Verify Arizona branch invoicing setup and run the test invoice this month.
    3. Demonstrate invoice sync to QuickBooks after generation.
    4. Review QuickBooks payroll import/export options once payroll report can be generated.
    5. Provide guidance on required templates if client-specific payroll formats are needed.
  ii. **Teresa**
    1. Review the two Excel files (stationary + mobile site pricing).
    2. Update and send back pricing data for upload.
    3. Work with Tom or Citywide to get QuickBooks payroll properly set up (including tax info).
    4. Attempt to run a payroll report in QuickBooks to understand its structure.

5. **Report Submission & Approval Flow**
  a. **Client Complaints**
    i. Clients are reporting that they are **not receiving complete sets of reports**.
    ii. Currently, only **approved reports** are sent to clients.
    iii. Reports pending approval do **not** get sent, causing gaps.
  b. **Existing Logic**
    i. The current system follows **PSSP's required workflow**, where:
      1. Reports follow an approve/reject flow.
      2. Only approved reports are sent within the defined 24-hour window.
  c. **New Requirement from Client**
    i. Teresa highlighted a newly raised concern:
      1. Clients want **an option to either**:
        a. Send **all reports together** once all are approved, **OR**
        b. Send **partially-approved reports** immediately without waiting for all approvals
    ii. Additionally, once a report is approved, it should be **sent immediately**, not wait for the next 24-hour cycle.
  d. **Priority Escalation**
    i. This requirement was initially minor but has now become **one of the client's top concerns**, as mentioned by the chief.
    ii. Due to this escalation, this feature is now a **high-priority item**.
  e. **Action Taken**
    i. Kuldeep confirmed:

            1. The team will prioritize this change.
            2. A workflow will be finalized with Teresa.
            3. If needed, a hotfix will be deployed.

6. **Pricing Upload Sheet Issues**
    a. **Concerns Raised**
        i. Teresa reviewed the pricing upload sheet and found:
            1. **Incorrect site IDs** appearing as backend values.
            2. **Duplicate entries** for sites that only have **one coverage**.
            3. Confusion due to active + inactive coverage entries being mixed.
            4. Some sites are showing multiple coverage rows despite having **only one patrol coverage**.
    b. **Clarifications Provided**
        i. Kuldeep explained:
            1. The first column shows backend site ID (for system use).
            2. The second column shows the **actual site ID** (client-facing).
            3. Coverage ID should be ignored—it is for internal use.
            4. Duplicate rows appear when:
                a. A site has multiple coverage entries (present, past, or future)
                b. Some older data included forced future dates (e.g., 2026) due to earlier system restrictions.
    c. **Client Requirements**
        i. Teresa requested:
            1. Only active coverage records:
                a. Current or future coverage dates
                b. Any record with NULL coverage date should be considered active
            2. Remove 2026 and future dummy dates.
            3. Provide a clean, simplified sheet with only active entries so she can add pricing easily.
    d. **Action Taken**
        i. Kuldeep committed to:
            1. Cleaning up the sheet.
            2. Removing duplicate and inactive coverage entries.
            3. Providing an updated sheet by tomorrow.

7. **Payroll Report & Department Alignment Issues**
    a. **Issue Reported**
        i. Tanya attempted to pull payroll reports but found:
            1. Employee **departments were misaligned**.
            2. Missing or incorrect department mapping caused payroll failures.
            3. The original uploaded file may not have included department details properly.
    b. **Discussion Points**
        i. Jaspreet noted that:
            1. Departments were initially mapped statically.
            2. Later, a dynamic department assignment was introduced.
            3. This may have caused changes in stored values.

ii. Teresa requested:
    1. A way to verify department alignment for all employees.
    2. A proper export of the current department mapping.
    3. A method to update missing or incorrect departments.

c. **Department Mapping Requirements**
   i. Teresa clarified:
      1. **Field Agent → Standing Officer**
      2. **Mobile → Patrol Officer**
      3. Dispatch department → All dispatchers
      4. Admin department → All admin staff
   ii. A complete exported list would allow her to:
      1. Review current mappings
      2. Update exceptions manually

d. **Action Taken**
   i. Kuldeep:
      1. Will verify the department data using the original Excel sheet and the database.
      2. Will identify missing departments and align them.
      3. Will share the uploaded dataset so Teresa can cross-check and update special cases manually.

8. **KPI Discussion**
   a. **Discussion on KPI Activity Mapping**
      i. **Issue Raised**
         1. Kuldeep highlighted confusion regarding the KPI module, specifically around the **mapping of activity codes with KPIs**.
         2. While verifying the KPI module, the team realized that the **mapping between activity codes and KPI scoring** was missed.
   b. **Clarification from Teresa**
      i. **Highlights vs. Activity Codes**
         1. Teresa clarified that:
            a. The KPI system should not map individual activity codes (10 codes) to KPI scoring.
            b. Instead, KPI scoring should be based on highlights only, not on each individual code.
         2. Highlight categories:
            a. **Yellow** = Priority
            b. **Blue** = Maintenance item
   c. **KPI Logic for Standing & Patrol Departments**
      i. **Standing Department Logic**
         1. Each standing guard must generate **3 highlightable items per shift per day**.
         2. Highlights include both **Yellow** and **Blue** categories.
         3. KPI Scoring:
            a. If the officer completes 3 highlights, they receive the allocated points (e.g., 4 points).
            b. If they perform additional highlights → No extra points.
            c. If they fail to meet 3 highlights → 0 points for the day.
      ii. **Patrol Department Logic**
         1. Patrol officers operate on beats and must generate at least **one**

highlightable item per site visited.

2. The system must:
    a. Count highlights per site per beat.
    b. Award points based on whether the officer meets the required highlight count.
3. Kuldeep noted this requires a **different approach compared to Standing guards**, as highlights need to be tracked across multiple sites.

d. Negative Points

i. Clarification from Teresa:
1. **No negative points** will be assigned for highlight-related KPI calculations.
2. Negative points may apply for **other KPI categories**, but not highlights.

e. Implementation Considerations

i. Kuldeep's Implementation Concerns
1. The current KPI setup works well for the Standing Department.
2. For Patrol Department, the team must design:
    a. How to calculate site-wise highlights.
    b. How to handle beats and visibility of targets.
3. Kuldeep confirmed the logic is now clear and development can proceed.

9. PSSP Priorities

a. Further updates and priorities related to PSSP will be discussed **tomorrow** in another meeting with Tom and Teresa.

10. Demo Planning

a. Kuldeep asked for confirmation regarding the planned **demo this week**.

b. Teresa mentioned:

i. Tom has not confirmed the date.

ii. Due to **Thanksgiving on Thursday**, the demo may not happen this week.

iii. Teresa will confirm after discussing with Tom later that day.