Event Day and Closeout

- **Event Day**
  - Event days you will need to be reachable, especially leading up to start time. The time leading up to an event is the most vulnerable you will be to issues.
    - Have your day planned well and have your contingencies in place.
  - On the morning of an event reach out to your solo staff and Captains/Roster Managers via chat, call, text. Make sure they are all good to go.
    - Send a chat message to all staff on the event
      - “Good morning team! A few things to remember for today's event. Don't forget to send a chat message when you are on your way. This will give the client a good idea when to expect you. Also send a chat when you arrive and leave. This is in case the app doesn't work. Punch in and out on the app. This is super important as it affects pay. Make sure you plan for traffic and arrive with plenty of time to be by the client at start time. Also, make sure your uniforms and presentation are sharp and on point. Please go into the shift details, scroll all the way to the bottom and read all of the details. Thank you and have a great shift. Please reply confirmed so I know you received this chat.”
        - If the event is an early morning event, you may need to send this message the night before but adjust it to say, “Good evening team. A few things to remember for tomorrow’s event..........”
    - Have your Captain or Roster Manager if applicable, reach out if there are any red flags.
      - Do not hesitate to remove any staff that show red flag signs. The sooner you make this decision, the better chance of finding a replacement.
    - Reach out to all backups and make sure they understand where you are at for the day. Let them know that they are still your #1 backup if something happens.
  - On group events, make sure that you have someone assigned to get staff checked in, and to inform you of the event status
    - You, your Captain, or Roster Manager will manage this task.
    - Knowing who is present/missing needs to be known immediately and no later than 10 minutes **BEFORE** the start time to ensure the ability to react quickly and to activate any contingencies.
  - All Staff must clock in and out on the app in order to process payroll.
    - Some events may have network difficulties and require you to manually clock in/out staff.
      - Make sure you have a way to verify if the staff are there and when they arrived and left.
    - Staff will not be able to clock in unless they are within 300 yards of the event address
    - Staff will not be able to clock in unless they are within 30 minutes of event start time.
      - Staff pay does not start until the contracted start time unless the client gives expressed consent that they understand extra charges for starting early.
      - Staff is expected to be onsite and ready to go 15 minutes early. This is unpaid. It is lead time to allow for them to find their meeting spot, get ties on, etc. The idea is that they are at the client’s side and ready to go at event start time.
    - Admins, Captains, Roster Managers, and Staffing Managers will have the ability to manually adjust any time errors in the system
      - The system is set up to automatically snap the clock in time to the nearest 15 minutes. Sometimes this will need to be manually adjusted for accuracy.

- The Captain or Roster Manager will text or email you a photo of the completed AND signed roster.

STAFFING MANAGERS ARE REQUIRED TO INFORM YOUR SUPERVISOR THE STATUS OF ANY EVENT CHECKIN ISSUES

- **Event Completion**
  - 30 minutes prior to the completion of any private event the solo staff or Roster Manager needs to have an end of event meeting with the client or onsite contact. This meeting is to discuss end of event duties, and gratuity if applicable.
    - Mr./Mrs. Client,
      "The event is scheduled to be completed in about 30 minutes. I/We are going to start our normal cleanup/closing tasks. If there is anything specific that you would like done, let me know and I will add it to the list. If you feel like you would like more time, I/we are happy to stay. Just refer to your agreement for any charges that you will incur for the extra time. Let me know if you approve and I/We will stay and help. The only other thing to discuss is the gratuity suggested on your agreement. Would you like to take care of that today or have the office put it on your card?"
        - This conversation will provide the expressed consent by the client to bill if the event goes longer or if they want the gratuity added
  - Check out is done the same way as check in.
    - Staff must clock out in order to process payroll
  - The Client or Roster Manager must sign the completed roster, if applicable.
    - Typically, this would be any corporate staffing partner event, but any time that you send a roster to the client before the start of the event, this is the expectation.
    - Preferably it is the Client who signs.
    - They will need to take a picture and upload it using this link: https://zngl.me/yM9BANp
  - Anyone who has Captain permissions needs to go into the event on the app and put notes about each staff member's performance as well as general event comments including gratuity, if applicable.
    - This is expected to be done after every event by the Captain or Roster Manager unless there is none. If not, then it is the Staffing Manager's job when completing ready for payment.

- **Follow Up**
  - Follow up begins right away with the staff
    - Once the event is completed, start the process listed below. All follow up steps should be completed within 24-48 hours of event completion, at a maximum. CC David on all communications.
      - Any 1st time event staff are critical to touch base with
        - Find out how the event went
        - Find out how they feel about working more events
          - Encourage them to sign up and inform HR of their intentions so that they can complete any onboarding.
  - Client Follow Up
    - Private Events
      - 1st follow up- "How did the event go? How did the staff do?
        - Do not follow up if the event has extra hours than booked or if there were any red flags. Reach out to David and he will handle the follow up.
        - Send within 24 hours
          - Template found **HERE**

        - If the client responds positively- Send Review links text
            - Template found **HERE**
            - Send kudos to the entire market via Ubeya Feed, calling out the staff for a job well done.
            - Management will notify you when or if a review was posted
                - If you receive this email from Management, your follow up process ends here.
        - If the client responded negatively-Send to Management
            - You will discuss the proper way to move forward
            - DO NOT SEND REVIEW LINKS EMAIL
        - If client does not respond, send 2nd follow up
    - 2nd follow up
        - Template found **HERE**
        - If client does not do the review, or respond within 24 hours- Send to Management to take over the follow up
        - Use the subject line "No Feedback Received"
- Corporate Staffing Partner Events (Clients that we have a corporate agreement with)
    - Send the corporate client follow up template email
        - Template found **HERE**
    - We do not send review links to these clients after events

- Client Follow Up
    - Private Events
        - 1st follow up- "How did the event go? How did the staff do?
            - Send within 24 hours
                - Template found **HERE**
            - If the client responds positively- Send Review links email
                - Template found **HERE**
                - If client responds with a specific gratuity, send the review links email and process the gratuity on the ready for payment detailed **HERE**
                - Management will notify you when or if a review was posted
                    - If you receive this email from Management, your follow up process ends here.
            - If the client responded negatively-Send to Management
                - You will discuss the proper way to move forward
                - DO NOT SEND REVIEW LINKS EMAIL
            - If client does not respond, send 2nd follow up
        - 2nd follow up
            - Template found **HERE**
        - If client does not do the review, or respond within 24 hours- Send to Management to take over the follow up
            - Use the subject line "No Feedback Received"
        - If client does not provide gratuity information or if the tip is low, send to Management to take over the follow up
    - Corporate Staffing Partner Events (Clients that we have a corporate agreement with)
        - Send the corporate client follow up template email
            - Template found **HERE**

                - We do not send review links to these clients after events

- **Closing Events and Payment**
    - To close out an event and get the staff paid, it is preferable to have all pertinent information, as well as the client feedback.
        - Staff Hours
            - Staff is paid hours worked
                - This means that they are paid from contract start time (unless they are late) to the time they clock out. They are paid for their actual hours worked.
                - Early clock ins and late clock outs must be authorized by the client on all events.
                    - Our corporate staffing partners have already preauthorized late clock outs for their events as they frequently will go over. They have no preauthorized early start times however.
                    - If a client does not approve extra hours by having a conversation with the Roster Manager/Captain or Management, staff that stay late will only be compensated for contracted time.
        - On rostered events, this will require your Roster Manager or Captain to have texted or emailed you a picture or given you the SIGNED roster with everyone's' sign in/out time completed.
    - Gratuities
        - Gratuities are typically between the client and the staff, and we have nothing to do with it. This will be stated in the order you receive.
        - If the client wishes to pay a gratuity on their credit card, this amount must be placed into the "gratuity needing paid" box on the roster as well as noted on your ready for payment.
            - This can only be done if you have had a conversation with the client about the gratuity and they have told you how much to run. This will be rare.
                - Most of the time, you will just make a note in the body of your RFP to let management know that they need to contact the client for gratuity.
                - DO NOT wait to send RFP if you do not have gratuity amount.
    - Once you have all information necessary, you can close out the event.
        - From the Manage event screen, click on the tab "Edit Payroll"
            - This screen allows admin to make any corrections for payroll before sending the ready for payment
        - Directly under the Revenues box is the "Employees salary" box (by view of left to right)
            - Name box: the staff members name
                - Rating: 1 to 5 stars are used to rate that person's overall performance for that event
            - Shift box: allows changes to the shift but not the start and end time only to change to a different assigned shift
            - Hours started box allows changes to be made to the hours started
                - All times are to the closest quarter hour
                    - Manually adjust any times that are necessary
                - Directly under in parenthesis will be the actual time the staff member clocked into Ubeya
                - Directly under the parenthesis is a location button'
                    - Clicking on the location button will bring up the map to show you exactly where the clock in took place
            - Hours ended box allows changes to be made to the hours ended
                - All times are to the closest quarter hour
                    - Manually adjust any times that are necessary
                - Directly under in parenthesis will be the actual time the staff member clocked out
                - Directly under the parenthesis is a location button'
                    - Clicking on the location button will bring up the map to show you exactly where the clock out took place

BEFORE MOVING ON, VERIFY THAT THE HOUR STARTED AND HOUR ENDED MATCH THE ACTUAL HOURS WORKED

- Total hours box gives a total amount of hours worked for that events shift **DO NOT CHANGE**
  - Use this box to re-verify that your start and end times are entered correctly
- Regular hours box **DO NOT CHANGE**
- Break time box
  - For events that need a break time taken out, you will manually do that here.
    - Click on the + sign
      - Enter the break start and end times and click the x in the top right.
  - Any time you enter a break time into a shift you need to make sure it is calculating correctly.
    - Go to the "Actions" dropdown next to the blue "Archive event" button
      - Select "Payroll settings for the specific event"
      - Go down to where it says "Deduct break times from total payroll and make sure this toggle is green.
        - If it is not green, click the toggle to change it and click the blue "Update Group" button.
- Overtime box **DO NOT CHANGE**
- Client rate box **DO NOT CHANGE**
- Hourly rate box allows changes to the hourly pay which can be event specific
  - This spot will default to the announced rate for all staff. If you need to change any rates, you can manually click and type in the amount.
    - Roster Managers are paid $1/hr more
    - Captains are paid $2/hr more
    - Sometimes there will be a rate bonus for multiple day events, referrals, etc.
- Shift flat rate box **DO NOT CHANGE**
  - This info is populated if there was a flat rate entered when building the announcement.
- Flat rate limit box **DO NOT CHANGE**
- Travel expenses box allows any travel allowances to be entered
  - Travel allowances would be known at the time of announcing the event. This could include:
    - Parking reimbursement
    - Flat rate travel pay
    - Fuel reimbursement
- Tip box: enter the tip amount from the client that is to be added to the staffs' pay
  - Remember: Subtract $5 for credit card processing
    - If the client says run $100 for the staff member on my credit card, then you would put $95 in this box.
- Notes box: DO NOT USE
- Payroll box: DO NOT USE
  - This will calculate hourly pay, hours worked, and any travel or tip pay entered
  - If there is a flat rate that will calculate with any additional travel pay or tip entered
- Total client rate box: DO NOT USE
- Delete box: by clicking the trashcan icon this will completely delete that staff members' shift from the event
  - Use this if that shift was not completed
- Locate the white "Comments" box in the top right
  - Enter any general event comments here

- All the info entered in each box listed above will auto save as you move to the next box
  - Remain in the Edit Payroll area for the next section

- **Build Ready for Payment**
  - ***Ready for Payment (RFP)*** is what we call the document that gets sent to admin to process staff payroll and to close out the event.

- In the Edit Payroll section of the event, locate the “Actions” button.
- Select “Premium Event Report”
- Open the file
    - Click yes to the popup alert
    - Click Enable editing
- Left Click in cell C1
    - Highlight the information located in the parentheses
        - I.e: (6 Servers 8:30p-12:30a)
    - While highlighted, hold the control key and the x key to “cut” the text
- Left Click in cell C7
    - Hold the control key and the v key to “paste” the previously cut text into that cell.
- Once pasted, go to the cell border option in the “Font” menu located at the top of the page.
    - Click the dropdown and select “All Borders”
        - This will put a border around cell C7
- Left Click in cell C3
    - Highlight the text “-Participants list”
    - Once highlighted, go to the “Font” menu area at the top of the page
    - Click the “Bold” option to unbold the text
    - Change the text size to size 9
    - Change the text to “-RFP”
- Left Click in cell A8
    - Hold the left click and drag your mouse down and to the right until you have highlighted all cells with shift information in them
- While Highlighted
    - Go to the “Font” menu area at the top of the page and select the “All Borders” option as learned above.
- Locate column G which should be “Hours”
    - Select the first blank cell under the box in column “G” and do an AUTOSUM
        - Make sure you are on the “Home” tab of the excel file and locate the “Autosum” button in the top right.
            - When you click “Autosum”, all numbers in that column will add together and paste the sum in the blank cell you had selected.
            - Please ensure the number is formatted as a number and not general or the number will automatically round up to the nearest whole number
                - In the cell with the sum, right click and select “Format Cells”
                    - In the list that opens, select number, then OK
- Locate column J which should be “DIV”
    - Select the first blank cell under the box in column “J” and do an AUTOSUM
        - Make sure you are on the “Home” tab of the excel file and locate the “Autosum” button in the top right.
            - When you click “Autosum”, all numbers in that column will add together and paste the sum in the blank cell you had selected.
            - Please ensure the number is formatted as a number and not general or the number will automatically round up to the nearest whole number
                - In the cell with the sum, right click and select “Format Cells”
                    - In the list that opens, select number, then OK
- Save the file using the same format as the roster and order but add RFP to the end.
    - CP 1.2.20 Downtown 80202 RFP
    - 1.2.20 Jane Doe Aurora 80019 RFP
    - Save it in the same folder on your desktop as where you saved the order and roster, if applicable.

- **Send Ready for Payment**
    - In the body of the email should be:
        - Hours worked
        - Hours booked
        - Travel pay total (if applicable)
        - Gratuity amount needing paid to staff (if applicable)
        - Any additional notes
            - Examples: explain changes to pay, explain hours booked vs hours worked
                - Hours booked = 30
                  Hours worked = 23.75   1 call off. Event went long. All staff 30-minute break
                  Gratuity included in rate. Add 40 travel each.
    - Attach the RFP
        - Before attaching it, review the RFP file again
            - Check to make sure all information is correct and the file is named correctly
    - RFP will be sent to HR@premiumeventsaffing.com
        - The subject line needs to match the name of the attached RFP file
            - i.e.: CP 1.2.20 Downtown 80202 RFP
            - i.e.: 1.2.20 Jane Doe Aurora 80019 RFP
    - Make sure everything is attached to the email
        - RFP
        - Pictures of the signed roster, if applicable
        - Pictures of parking/travel receipts, if applicable
        - Any other pertinent items that could affect payroll
    - Send Email

- **Staff Notes and Tagging**
    - Go back to Ubeya
        - Make sure you are in the "Edit Payroll" section of the event
    - Update all staff notes and tags from the event
        - Go into each staff member's profile by clicking on their name
            - Go to the "comments" section in their profile and leave a comment about their performance at the event
                - Be as detailed as possible
                - If you have no feedback yet, say that in the note.
                    - If you get feedback from the Roster Manager/Captain or client, you need to add that note later.
                - Hit Enter to add the comment to the log
                - After entering comments, click the blue "Update" button in the top right to save the notes

            - Add tags
                - In the staff member's profile, select "fields"
                - Scroll down until you find "Select Corporate Clients" and click on that line.
                    - A dropdown will appear with a list of our corporate staffing partners.
                        - Select the one that applies to the event you are closing out
                            - This tagging step only applies to our corporate staffing partner events
    -

- **Archive Event**
    - In Edit Payroll section in Ubeya, click the "Archive Event" button

You may need to go back into the archived event and update staff notes if you do not get feedback until later.

- **Staff Status Changes**

When it is determined that you do not want to use a staff member anymore (or even a temporarily delay in using them i.e., poor performance market) or they call off an event for a reason that you are needing documentation, here is the process for that. Once this processed is finalized, I will be updating the staff status change document as well.

1. Staffing manager decides to not use a staff member again for any reason or we need documentation for a call off.
2. **Staffing manager immediately removes their market tag in Zingle and Ubeya**
3. Staffing manager sends an email to ONLY David with the following information:
   Subject line: Staff member name, date and DNU or Call off Documentation needed

   Body: Reason for DNU and/or Call off and reference any documented communication regarding this action, i.e., see Zingle chat, see client feedback, etc
4. David will review and forward to HR with approval
5. HR will go through the deletion process and deal with any communication needed

I do not want staffing managers telling staff they are no longer eligible to work events for any reason. Also, I do not want staffing managers to request documentation for call offs. If someone calls off an event and documentation is needed, just forward the request to David as listed above.

MANAGEMENT MUST APPROVE ANYTIME A STAFFING MANAGER WANTS TO ACTIVIATE SOMEONE FROM DNU.

- Poor Performance Market - We use this status for those that the Staffing Manager does not plan to use for a while. We must communicate with the staff that we will not be using them for x amount of time and reason why. The reasons may be:
    - Being late to an events
    - Bad attitude
    - Poor communication
    - Low Rating or overall poor performance
    - Bad review from Roster Manager or Captain
    - Bad review from Staffing Manager.
        - When you determine someone needs to go into poor performance, follow the following steps:
            - Communicate with the staff member
            - Send an email to HR asking that the staff member be placed into the poor performance market and the reason why.
            - HR goes into profile section of their profile and adds– PP – Reason – Event Date
            - HR removes their primary market and adds the poor performance market

- If the reason for moving the staff member to the poor performance market was due to the training test needed, the Staffing Manager will send HR and email stating the quiz was completed and HR will add the primary market back.
- If the reason was something other than training, the Staffing Manager will notify HR if/when their primary market should be added back.
- Poor performance market will be reviewed periodically to determine next steps with the staff.