

Staffing Procedure

In this section, we will go over the process of staffing events from beginning to end. This will include all the steps that you do after announcing an event to processing the staff payroll. Please click any links provided and interact with the linked files/locations as you move through this training.

- **Build the announcement in Ubeya right away**

- **(DO NOT SEND YET)**

- You will want to have the client order in front of you to accurately complete the next several steps.
- Determine Priority:
 - You must determine if the event is sooner or later. (Within the next 2 weeks or not)
- Open [Ubeya](#)
 - During the next several items, you will want to have Ubeya opened and follow along.
- Click "Calendar" on the black menu on the left
- In the month of the event, click on the date of the event
- A box will pop up titled "Add Event"
 - The cursor will automatically go to the "Location Name" box
 - Enter the city and zip of the event only in this box
 - Sometimes an address will automatically populate the "Google maps location" box
 - If this happens, just move your cursor outside of the box in an open space and click your mouse. That will clear it and you can move on. Do not push the tab button or select one of the auto-populated addresses.
 - Click in the "Google maps location" box
 - Enter the address of the event (no apartment or suite #s).
 - As you are typing the address, google will automatically bring up options to try to auto match your entry. Once you see the correct match, click on it.
 - "Description" box **DO NOT USE**
 - Click in the "Client's name" box
 - Enter the name of the company/client
 - If Corporate Staffing Partner event: Company name (not the contact person)
 - If private event: Client's name
 - "Event type" box **DO NOT USE**
 - Click the "Show more options" dropdown.
 - This will give you more fields to enter event information into.
 - Click in the "Event name" box
 - Enter the position(s) and shift time (s) from the order in here
 - Example: (1 Bartender 4p-10p, 1 Server 4p-12a)
 - If the order changes, you will need to go back into this box to change the information.
 - To change the information, go into the event and click on the event details header at the top of the page:
 - When you click on the event details, a box will pop up called "Edit event"
 - Go to the "Event Name" box and enter the new shift details.
 - Click in the "Uniform" box
 - Uniforms that we typically use can be found [HERE](#)
 - You may type any uniform that you want in this box by clicking "modify" or select a pre-loaded option.
 - Click in the "Client's name" box
 - Enter the name of the company/client

- If Corporate Staffing Partner event: Company name (not the contact person)
 - If private event: Client's name
- "Client's on-site contact" box **DO NOT USE**
 - **DO NOT PLACE CHECK IN:** Would you like to send a notification to the client about the new event?" box
- The "Event Booker" box should auto populate with your email but if not, just click the dropdown and make sure you are selected.
- The next box is "General comments for the event"
 - This box is used to make a standard general announcement to staff
 - **NON-SERENDIPITY EVENTS**
 - You have been selected to work this event! ONCE YOU HAVE READ THIS ENTIRE SECTION, TAP "CONFIRM". The hours posted are an estimate from the client and you will only be paid for your actual hours worked. You MUST SEND A GROUP CHAT when you are on your way! And when you arrive, GROUP CHAT that you have arrived, and clock in no later than 15 minutes before your start time. If you are not checked in 15 minutes before your start time you are considered late! Please remember to CLOCK IN ON THE APP no later than your start time! If you cannot clock in, please immediately notify MANAGEMENT VIA GROUP CHAT. You must be standing inside or at the door of the venue/building in order to be allowed to clock in/out! Please also be willing to stay late if asked; you will be paid for the additional time.
 - **SERENDIPITY EVENTS**
 - This is a Serendipity event. You must introduce yourself as "with Serendipity Catering" and not Premium Event Staffing. All gratuities are included in the hourly rate. In the event that a guest gives you a gratuity, you are to give it to the Serendipity Captain or place it in the pre-designated place for the Captain to collect. If this is an event at the Botanic Gardens, you must adhere to specific venue instructions in regards to disposal of any refuse including water. Nothing can be dumped out on property. Please communicate with the Captain if you are unaware of these regulations. Finally, if you are assigned as the lead or roster manager, your only duties are to get people signed in and out and communicate with your staffing manager in regards to staff count. Outside of those duties, the Serendipity Captain is in charge of all staff and everything they do at the event. You are not to gather staff and give any instruction. All questions need to be given to the Captain.
- Click in the "Staff meeting spot" box.
 - If there is specific parking and/or meeting spot information, place it here.
 - Also put any parking reimbursement info here.
- Click in "Site contact" box
 - Only place the onsite contact's name in here. No other information.
 - Solo event contact is the client.
 - On a multiple staff event, the contact person is the Roster Manager or Captain of Premium Event Staffing.
- Click in "Site contact phone" **DO NOT USE UNLESS GIVEN PERMISSION**
 - We do not give out any client phone or email information unless necessary.

- **DO NOT CLICK ON THE “Auto book staff when applied via mobile application” TOGGLE**
- Skip over the next 2 boxes (Number of guests and Notes)
- Click in the “Color” box and select the corresponding color to the market you are announcing.
 - Blue=Colorado
 - Yellow=Illinois
 - Green=Texas
- Click the blue “Next” button on bottom right to go to the Add Shift section

- **Add Shifts**

- This is where you will add the shift information.
- The banner titled “Shift #1” will include the address entered, a copy icon, and a trash icon.
- If you click on the address, a box will pop up titled “Edit Address” **DO NOT USE**
- If you click on the copy icon, a second box titled “Shift#2” a new identical box will be added to this screen under the “Shift#1” box
 - If you copy a shift, it will automatically input the same times, quantity, pay, and details of the shift you copied.
 - You will be able to edit the details of the copied shift if you do this.
- Click on the line “From” and “To”
 - Enter the start time and end time in the corresponding field.
- Click {Tab} on your keyboard or click in the next line under “Position”
 - Select “All Group”
- Click {Tab} on your keyboard or click in the next line under “Qty” which means quantity
 - Enter the quantity of staff requested for this position/shift from the client order.
 - If there is more than 1 position on the order, the different positions will be on different shifts. More on that shortly.
- Click {Tab} on your keyboard or click in the next line under “Hourly Rate”
 - Enter the hourly rate for the shift.
 - If the shift is a flat rate pay and not hourly, enter that amount on the “Shift flat rate” line instead.
- Click {Tab} on your keyboard or click in the next box under “Shift description”
 - All shift descriptions use a standard format. Use this format whenever possible:
 - We are looking for a (Position). You will (description of job duties) The attire is black dress slacks, collared long sleeve black button-down shirt, ALL black socks and shoes, and plain colored mask without writing. The posted rate includes all gratuity. The hours are as estimate from the client. You will be paid for actual hours worked (4 hour minimum). The event may get done early or go longer. If the event goes longer, you will need the approval of the client. Make sure to read the parking and meeting place information in the app.
- Click {Tab} on your keyboard or click in the next line under “Shift Uniform”. **DO NOT USE**
- “Flat rate limit” **DO NOT USE**
- “Client rate” **DO NOT USE**
- If you have multiple shifts on the same event, click the “+ Add Shift” at the bottom. This will add another blank shift in the box that you can edit using the steps that we just went over.
 - Click the blue {Save} button on bottom right.
 - Ubeya will automatically bring you to a screen that says, “xxx Users will receive this message”.
 - Click on “Add and do not check availability”.
 - This will automatically take you back to the current monthly calendar.
 - When you “Add and do not check availability” it adds the event you just built to the calendar, but it does not announce it to the database.

- This allows you to go back into the event and double check details.
- Click on the box of the event you just entered in the calendar.
 - This will bring you to the “Manage Event” screen.

- Look under the banner with the event name and description and locate the white filled banner that says: “Add a tag”.
 - Enter the city tag
 - The city tag is especially important as it assists with payroll reporting when the event is closed. The city tags are:
 - Dal- Dallas
 - Chi- Chicago
 - Den- Denver
- Locate the white sub box on the page labeled “Available”
- Click “Check Availability”
 - Ubeya will automatically bring you to a screen that says: “xxx Users will receive this message”.
- On the far right locate the white sub box “Choose Your Target Audience”
 - Click in that box and type in the tag(s) of those who should receive the announcement
 - The tag(s) help you isolate the proper staff audience for the shifts available.
 - You can use multiple tags to achieve this.
 - In example, you could use the “Staff Market-Denver” tag and the “Position: Bartender” tag to isolate all staff that have those tags in their profile.
 - You can select individual and specific staff to send announcements to.
 - If you want to do this, do not put any tags in the “Choose Your Target Audience” space
 - Instead, type the staff members name in the “Search” field
 - Once that person’s name pops up, click the check box by their name.
 - You can repeat this process with other staff members until you have everyone selected that you wish.
 - Locate the blue bottom in the top right “Check Availability” and click it

Staff Selection

- Staff in **Available** have applied to the event and you have not contacted them or decided to book them.
 - Staff who remain in this box, do so because of a few main reasons
 - The event is full and there are enough backups
 - They are not eligible to work the event (REMOVE FROM AVAILABLE)
 - They do not have the correct skillset
 - They are not approved by HR because of missing onboarding items
 - They were un-booked from the event
 - While staff remain in this box, it will appear as “pending” on their end in the app.

THE FIRST THING YOU DO WHEN A RESPONSE COMES IN, IS TO CHECK THE NOTES ON THE STAFF MEMBER AND FOR PROPER ONBOARDING

- Click on their name and a profile box will pop up
 - Scroll to the bottom of their profile and there will be a line with general notes
 - You are looking for any details that would eliminate them from eligibility for this shift
 - Click on the “COMMENTS” tab on the far left
 - You will look through the event comments list for the same thing
- Check for proper onboarding paperwork. There will be a note in parenthesis after their last name with any missing items.
 - Example: Kloverstrom (PO1)
 - If the staff member has a note of “[PO1](#)”, this means that they haven’t worked their first event and are “pending onboarding.”
 - If this is their first event, you can book them
 - If the event is a multiple day event, you can only book them on day 1 without paperwork. They will not be permitted to work the other days
 - Contact the staff member right away and inform them of this.
 - You should just make it a point to get the paperwork from staff before booking them on multiple day events at all.
 - If you look in the events tab and see that they have worked their 1st event already but are still missing paperwork, contact HR right away and DO NOT BOOK
 - If the staff member has a note next to their name of “[PBG 1.1.20](#)”, this means that they worked their first event, and they are in pending background status. DO NOT BOOK

As responses are coming in from the Ubeya announcement, you will need to engage with them as soon as you can. You do not want to lose staff to not engaging with them.

- Choose [Roster Manager](#) or [Captain](#) first, if possible. Otherwise, select the most appropriate candidate from the applicants as they come in.
 - On Corporate Staffing Partner events with multiple people, you will want to select a person who you trust to handle check in and out for the event and designate them as your Roster Manager.
 - This is typically reserved for your veteran staff members who have proven themselves.
 - Roster Managers do not manage the event or the staff. Their main job is to help with admin duties like check in/out and event comments
 - The Roster Manager must let the Staffing Manager know if any staff are missing no later than 15 minutes before event start time.
 - After the event is over, the Roster Manager needs to put comments in the app about the event and comments about each individual staff member and give each staff a star rating.
 - They are required to send a signed roster to Staffing Manager

- Roster Managers receive \$1/hr more than the announced rate ONLY if they complete the duties.
 - We only staff Captains on events where the client specifically pays for a Captain
 - Captains receive \$2/hr more than the announced rate only if they complete the required duties.
 - The Captain manages all aspects of the event at the request and guidance of the client
 - The Captain must let the Staffing Manager know if any staff are missing no later than event start time.
 - After the event is over, the Captain needs to put comments in the app about the event and comments about each individual staff member and give each staff member a star rating.
 - They are required to send a signed roster to Staffing Manager on events where a roster was required.
 - To give a Roster Manager or Captain permission to communicate with other staff on the event and to see their direct contact info, you must give them “Captain” access.
 - Hover your cursor to the right of their name in the “Booked” sub box. You will see a circle with a “C” in it. Click that.
 - This will send them a notification that they have Captain permissions.
 - You will need to let Roster Managers know that this does not mean they are running the event, it merely gives them access to items in the app like the ability to clock people in and out.
- For those who have applied, and you want to select them to work the event, click the green arrow pointing to the right. This will move that name to the selected sub box.
 - When you do this, the staff will not know they are selected. Use this selected area as a staging place for staff that you may use, as you are waiting for more responses.
 - A staff member who is in selected means that the Staffing Manager intends on booking them but hasn’t done so because a few possible reasons
 - The staff member hasn’t been reached yet
 - The Staffing Manager is waiting on a response from another staff member
 - The event is full and the staff in the selected area are the backups
 - The staff member was booked but was removed from the shift
 - Once the event is full, you will remove any staff from selected unless they are an actual backup.
 - No staff should remain in selected unless there is a note attached to their name explaining why they are there
 - I.e) “confirmed backup”
 - Any staff that you want to book for the event, click the green arrow pointing to the right in the “booked” box.
 - This will move the staff member to the booked sub box and a notification that they are booked will be sent to them automatically.
 - When a staff member is booked, they will have access to the specific event details like the actual address and any other information that was hidden.
 - If the event is full and you have enough backups, click the trash can icon in the available sub box.
- When you do this, the staff will receive a notification that says, “Sorry, you were not chosen for this event but keep applying to events.”

Confirmations

- After a staff member is booked, they must confirm their shift. They should all be aware of this process from the Entering Staff to Ubeya.
 - When a staff member confirms, there will be a green checkmark by their name in the booked sub box.
 - If a staff member does not confirm their shift within a reasonable amount of time (your judgement), treat this as a potential red flag and contact them.
 - Frequently, new staff forget this part of the process.
 - You can manually confirm someone by clicking the green checkmark to the right of their name in the booked sub box
 - Only do this if you have contacted the staff member and discussed the proper process. It is preferable to have them do it from the app.
 - The day before the event, a reconfirmation should be additionally sent out to the staff member to ensure reliability and attendance on the booked event.

Stop Registration and Registration Pause

- Before you do this, make sure all staff are moved out of available.
 - If you get enough staff booked with backups, you can pause or stop the event registration
 - Find the red square button in the “Available” sub box and push it. This will stop registration.
 - You can also pause registration
 - In the same “Available” sub box locate the three vertical dots and push them.
 - Select “Pause shift registration”
 - This can be done per shift
- Each shift within an event has a pause registration option that you would use if one shift is full, but others are still open.

Manual Staff Entry

- There are instances where you may need to manually select staff
 - For instance, if you have a specific staff member in mind for an event because they fit the skillset or if a client requests them.
 - In the “selected” and “booked” sub boxes in an event you can manually select a staff member by following these steps
 - Locate a little square box that looks like a person with a + sign by it.
 - Make sure you locate the button in the correct shift as there may be several options
 - Once located and in the correct shift, push the button
 - The “Select Users to Add” box will pop up and you will be able to search for the specific staff member(s) by name.
 - Type their name in the search bar and click the blue “Add selected” button
 - This will add them to the selected sub box. You can then proceed to booking them as stated in the staffing process.

Overstaffing and Backup Process

- Overstaffing Events
 - There are times when we will purposely overstaff an event and send the extra staff directly to the event.
 - We do this when it is a large order, or we have a lot of new people on the event. The number of extra people we will send out is generally determined by the number of new people on the event or directed by management.
 - You can choose whether to tell the extra person or people that they are a backup or not. However, if we end up with more than the ordered amount show up, we follow the following communication process. This is communicated to the client by the Captain, Roster Manager or Staffing Manager.
 - We ask the client if they would like the extra person or people. They must understand if they agree to keep the extra, that they will be charged for the additional manpower. If they say “yes”, then the staff stays. If they say “No, follow the following elimination process.
 - If anyone was late, not in uniform, or looks sloppy; they are first to be asked to leave. They do not receive Backup Pay.
 - If everyone there is on time, in uniform, and the client does not want the extra; then you will next ask for volunteers. The volunteer will receive Backup Pay (\$20).
 - If there are no volunteers, then you send your official backup(s) home with Backup Pay (\$20).
 - Remove the staff from “booked” status in Ubeya and make a note by their name saying why they were un-booked
 - If they are receiving backup pay, the note will say, “backup pay”
 - If they are not receiving backup pay, make a note about the reason
 - Example: “un-booked from 11/14 event; late and not in proper uniform”
- Backups
 - The staffing process of acquiring backups differs from overstaffing. Backups are available if called upon, but they are not sent to the event unless needed. There are a couple of different criteria on how we determine what type of backup staff member is needed.
 - Under threshold of 10 people booked for the day
 - When there are under 10 people booked in a market/submarket for the day, events will need to have backups to be prepared for staffing changes. This is done by moving staff from “available” into “selected” status after all events are full for the day. Make a note under their name about their availability.
 - Move the backup to the selected box
 - Once in the selected status, you want to call (or text using the ‘back up message’ template in the texting app) the staff and establish agreement of being a backup:

Hello {first_name},

I noticed you applied for the event on (Date,Time, and Address). That event is currently full, but we'd like to use you as a confirmed backup.

What that means is essentially you would be on call (having full availability) up until the event start time just in case you are needed.

We may call you prior to the event day should something open as well.

On the day of the event, you are expected to answer your phone when we call and be dressed and ready to head to the event. Not answering would result in a no call, no show as if you were booked. NOT DOING SO, COULD LEAD THE REMOVAL FROM OUR DATABASE, SO PLEASE ONLY AGREE TO THIS IF YOU CAN FULFILL THIS ROLE.

By doing this for us, you would put you on the top of the list for high paying parties, including events we don't post to everyone. Also, you will be the first to call should another shift for a different event open for this day.

Please reply CONFIRM if you agree

- Click on the blue line "Note" by the staff member's name
 - Place a note about their availability for the event. Place any pertinent information received from the call with them.
 - Example Note: "Confirmed Backup"
 - Staff can be confirmed backups for multiple events in a day
 - Just make sure that you if you book them on an event, you remove them from the others.
- "Over threshold" of 10 people booked for the day
 - When there are over 10 people booked in a market/submarket for the day, a special "backup event announcement" will need to be created. This is sent once all the events for that day are full.
 - The backup event will be a useful tool to see how many staff are available in the market for that day
 - This allows Management to see if they can book more events
 - It also makes it easier for the Staffing Manager to manage backup staff for the day.
- Creating Backup Event Announcement
 - Open Ubeya
 - Click "Calendar" on the black menu on the left
 - In the month of the event, click on the date of the event
 - A box will pop up titled "Add Event"
 - The cursor will automatically go to the "Location Name" box

- Type in the “Market or Submarket” name, but do not enter a zip code
 - Skip all boxes until you get to the Event Name box
 - Type in “Official Backups Needed”
 - Skip all boxes until you get to the Color Box
 - Enter in corresponding color with target market
 - Click the blue “Next” button on bottom right
 - Add Shift
 - Shift Time: use the start time of your first event and for the end time use the start time of your last event.
 - Shift Description: This is not for a specific event, however; if you are not already booked on this day and flexible to travel within the market/submarket area, please apply and your staffing manager will reach out to you.
 - Publish Backup Event and Manage Applicants
 - The backup event announcement is not published until all events in the market/submarket are full.
 - Enter the market tag in “choose your target audience” area
 - Example: “Staff Market: Denver”
 - Once you have it tagged correctly, click “check availability”
 - Staff who reply to this event should be people who are truly available to work but have not been booked on any of the already full events for the day.
 - When they apply, they will come into the “available” sub box just like any other event. Some will have notes attached that tell you about their availability.
 - Example: “available after 4pm” or “can only work in the city”
 - If a staff member does not reply with a note about their availability, the Staff Manager will need to reach out to see if they have any limitations.
 - Any staff who the Staffing Manager deems as eligible to work will be moved to the “selected” sub box
 - In order to deem them eligible, you need to follow the same processes as discussed in the staff selection area on page 16.
 - Check for proper onboarding
 - Check notes and profile comments
 - Make sure they have the skill set
 - Check that they are not already booked on an event that day
 - The nice thing is that in Ubeya there will be a red “x” by their name if they are booked already for the day.
 - If they are booked already, you will need to remove them from this event and send them a courtesy chat, text, or call to let them know why they were not picked.
 - This can be a red flag that staff are not paying attention, so when communicating with them, decide if a change needs to be made on the event they are booked on.
 - Make any notes by their name that are pertinent to their availability
 - Click on the blue line “Note” by the staff member’s name and enter a note about their availability
 - Example: “available after 4pm only”
- [Limited Availability Backups](#) are staff who have limitations on what hours or where they can work that day

- This is not a bad thing; it will just limit the Staffing Manager on where they can book this staff member.
- In theory, any staff member who replies to this event without limitation notes by their name, should be available all day as the announcement requested.
- Make sure there is a note by their name with their availability limitations
- Send Limited Availability Backups a Chat (no call necessary)
 - You will need to send a chat to each limited availability backup separately
 - You cannot send a group chat unless the staff is in “booked” status. Backups do not get booked unless they are booked in a specific event
 - “Thanks for applying as an official backup, all events are full for the day. If a new event comes up that fits your limitations, you will be booked on that event. Please understand that being a backup is just as important as being booked for this event, so if I call you and you aren’t available, you do not answer, respond, or show up; you will not be selected for future events”
- All Day Backups are staff who have applied to the backup event announcement without any limitations regarding their availability for that day.
 - In order to make them an official all-day backup, you must call them and confirm their availability and go over the expectations of accepting that position.
 - “Hi David, thanks for applying to the backup event announcement for (insert date). All events are full for the day however I would like for you to be a backup for the day. If any day before the event that a spot becomes available, you will be immediately booked for an event. If no spots come available before this day; you are still expected to be ready to head to any event if needed in this area. Meaning that you have your attire and/or tools ready to head to the event with no hesitation. **The benefit of being an all-day backup is that I will automatically book you for a qualifying event that you apply for next week and I will pay you backup pay of \$20 if you qualify.** Ok? Great! I will be touching base with you several times this week to make sure you are still engaged. I will call you at the start time of each event and give you a status. Agreed? Great! Now understand that being a backup is just as important as being booked. So, if I call you and you are not available, or if you do not answer you will not be selected for future events.”
 - Move the staff member to the “Selected box”
 - Click on the blue line “Note” and add a note
 - Example: “Confirmed ALL DAY Backup”

As backups are booked for specific events, they are to be removed from the “selected” area of the Back Up Event Announcement. They also need removed from the “available” area. This ensures there is a clean number of people that are available but not yet booked for that day.

- **Engagement**

- It is necessary to continuously engage with the staff as you approach the event.
 - Reconfirmations
 - Reconfirmations are an important part of the engagement process
 - You will want to force a reconfirmation every couple of days, and always the day before the event.

