

Uber Checklists & Applications Breakout

4/25/25

Present: Christian, Deast, Tim C, Rik, Courteney, Dave, Raven, Ami, Jo, Debra, Crimson, Debbie, Bri, Sarah

- Deb is a dingus and everyone thought this was for DHs, doh
 - Send invites to Ami, Crimson, Debbie, Dave (?)
- Christian: no option to *decline* panels app in performer/guest checklist, so panels ends up with a lot of crap applications.
 - Jo: the “no” option should say “my contract does not require it”
 - Deast: sends people through the guest checklist
- Tim: Challenges & LTC heavily use public display; would like to have “badge printed name” visible on the attendee form. Change to “public display name” and include a blurb that it will show up for x purposes
 - Raven: to clarify, if you pull first & last name, those will pull people’s preferred names/those fields don’t need to align with the legal name. We do still use badge printed name for staffers, so it might be confusing.
 - We will need to upload a .csv of bad words, add character limit, etc. – does not require uniqueness per Tim.
- When do we expect Uber to go live? Deb/Raven: Soon(™)
- Bri & Sarah: we would like modular checklists
 - Raven: not too weird, but if the steps themselves aren’t changing, possible?
 - Potentially to resemble admin access page?
 - Deb: not into fully modular, would like to find more broadly applicable solutions
 - W9 step: configurable link needs to be updated every year
 - Potentially surface/make more findable the trigger for whether a group should have the W9 step shown (currently in gear under group listing) – also adding help text / simplifying it / make it a checkbox for yes/no if the group is getting paid
 - For guests who are also performers, give them the performer checklist and ensure guests have access to the proper information
- Dave: making sure some shifts are only visible once people have completed a certain step (cash handling)
 - This is already captured in Jira!
- Gillian: would like to have a separate session about everything checklist-related, and what would our dream system look like
 - Deb big +1
- Deast: is it possible for someone to see what panels they’ve already submitted?
 - Raven: West requested this! It will only show the panel name & basic info. (The crowd cheers.) Also, there was a bug for awhile that if a guest submitted a panel and then added an additional panel, it ate the guest and was not marked as a guest panels. This is now fixed!

- Sarah: sometimes a guest submits stuff NOT through the checklist; is there a way we could mark it/associate it with the guest record? Raven: not at the moment, but we could add it.
- Deast: came here to ask about getting an Arena checklist, similar to the Rock Island checklist.
 - Hospitality & transportation steps don't apply at the moment (though they are going to talk with guests about that in the future)
 - Panels app includes some tech needs questions, but it's not perfect
 - A lot of the information gets sent directly to guests instead of arena so he has to ask them for the information
 - Potentially a Google form with more specific questions
 - They also have this issue with panels; when panels go through the panels app, the information only goes to panels.
 - It is a pain point for them that they don't get to review email content + dates, and they end up being beholden to other people's dates.
 - This is also on the list to fix & Raven has been in touch w/ panels about it already! Panels under specific depts (which will be configurable) will use the same templates but come from individually configurable email addresses and dates.
- One primary benefit for having the checklist itself is being able to see whether people have filled it out, as well as automated emails
- It's also challenging to pull information out of Uber/it's also a permissions thing.
- Rik: writing up a wishlist for what you wish Uber did, what problems it has, what it does well and we shouldn't change, etc. – don't throw the baby out with the bathwater
- Deb: noted that music has wayyyyy more emails configured than guests, and that might be something to look at.
- Question about whether panels app needs to be open for guest checklist to go live; Sarah will check back in next week.
- ✉ Emails & Checklists (we handed this out in person)