

# Information for Libraries during the COVID-19 Closure

Updated 06/03/2020

## Courier

STAT has begun resuming courier service, but may need to limit the number of bins picked up from each location each day until full service is back to normal.

If you have empty tubs - or can empty some up- please let your driver know and note this on on the reopening spreadsheet at:

[https://docs.google.com/spreadsheets/d/1grqcgzeLa\\_rX5z14vztlIB1j84tgn169XDZ8STjJbgs/edit#gid=551303432](https://docs.google.com/spreadsheets/d/1grqcgzeLa_rX5z14vztlIB1j84tgn169XDZ8STjJbgs/edit#gid=551303432)

## Recommended Checkin Process

After much review of library processes and available settings, the PINES team believes that this process should prevent most (but not all) potential checkin/hold availability problems that could occur due to the unusual circumstances:

### Checking in items from book drop:

1. Quarantine returned items for a designated time period before checking in to minimize handling by library staff.
  - Your patrons should be informed that returned items will be quarantined before being checked in, but that any fines accrued because of this will be removed.
2. After the quarantine period, **separate items that belong to other branches** from items belonging to your branch.
3. Check in the items **that belong to other branches** normally so that transit slips are produced.
  - Some of the items checked in this way may be opportunistically captured upon checkin for a hold at your location and will send out holds notices, but this is not avoidable at this time.
4. Check in the items **for your own branch** with the "Suppress Holds and Transits" and "Amnesty Mode" checkin modifiers enabled and reshelve them.
  - Some of the items that you check in this way may appear on your Holds Pull List the next morning, but it will prevent hold pickup notifications from going out right away when the items are checked in so that you have more control over the process.

### Checking in items from courier:

1. **Separate items that belong to other branches** from items belonging to your branch.
2. Check in the **items for your own branch** with the "Suppress Holds and Transits" and "Amnesty

Mode" circulation modifiers enabled and reshelve them.

- Some of the items that you check in this way may appear on your Holds Pull List the next morning, but it will prevent hold pickup notifications from going out right away when the items are checked in so that you have more control over the process.
- Some of these items may already be captured for holds, in which case, holds suppression will not have any effect and the holds notices will be sent out automatically.

3. You can assume that most of the items **that belong to other branches** that the courier has brought to your branch are there because they have been captured for a hold. Check these in following the same local processes you use when checking in the items from your holds pull list.

Checkin Modifiers: If you are not familiar with using checkin modifiers, please watch the online tutorial:

<https://my.nicheacademy.com/pines/course/14667>

Do not use "Amnesty Mode" and backdated checkin at the same time because it will create a lot of negative balances that you will have to clean up. Just use amnesty mode by itself.

The "Suppress Holds and Transits" checkin modifier will prevent items from being *captured* for a hold, but if the item has already been captured then it will not undo that. For example, if an item appears on another library's holds pull list and that library pulls it from the shelf and scans it in to transit, it has been captured. Do NOT use Suppress Holds and Transits on items that belong to a different branch because it will move those items directly to Reshelving status even though they haven't been transited yet.

## Pulling Holds

**For all branches that receive courier service (STAT and/or local courier):** Please pull your complete holds list as normal (beginning May 28) so that items can be sent out to other library systems for hold pickups.

**For branches that are not yet receiving any courier service at all (local or STAT), but that are allowing hold pickups:** Please continue pulling only the items that will be picked up at your location following one of the options below.

### Option 1: Export to Excel

Instructions are available here:

<https://screencast-o-matic.com/watch/cYf3INAltq>

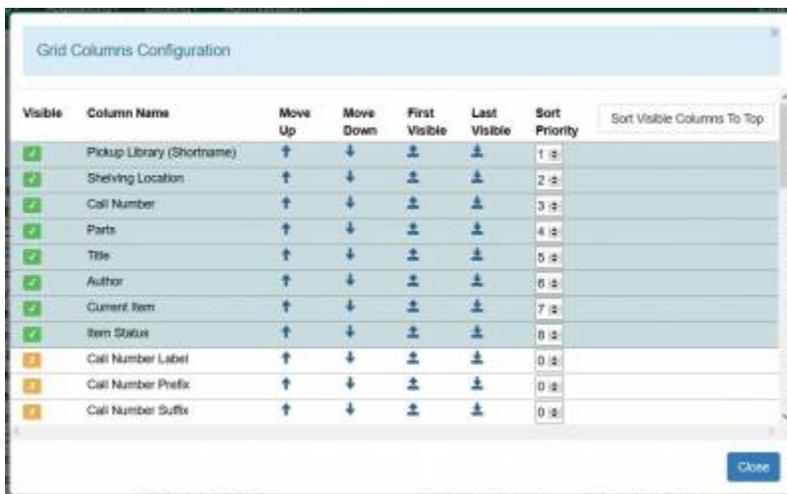
Note: You can also set up your columns and then use the Print Full Grid option.

### Option 2: Use Browser's File > Print Option

If for some reason the Download CSV or Print Full Grid process shown above will not complete, you can also configure your workstation to be able to use the browser's print function (you would only need to do this once for the workstation, not every time you wished to use it):

1. Use the dropdowns in the function bar to view 100 records at a time.
2. Click the column picker dropdown arrow, then Manage Columns.
3. In the popup window, select the columns you need to see by checking the "Visible" box to the left.
4. Click the "Sort Visible Columns to Top" button.

5. Use the Move Up / Move Down icons to arrange the columns in the order you want.
6. Use the Sort Priority options to sort the columns in the order you wish (example below).
7. Click the "Close" button.
8. Click the column picker dropdown arrow, then Save Columns.
9. Use the browser's File > Print function to print the pages you need.



If your library is marked closed in the Closed Dates Editor, but you still want to pull holds for patrons for curbside pickup, there is a setting that can be changed to allow your items to be targeted by the holds targeter even while closed. Please contact the Help Desk if you'd like to have this setting enabled.

## Patron Expiration Dates

All patron accounts that had been set to expire this summer have been pushed back to expire September 30, 2020. The automated renewal emails will go out on August 30.

## Closed Dates Editor

When you enter your closed dates, be sure to check the "Emergency" and "Process Immediately" checkboxes. If you do not do this, the due dates of items that were already checked out will not be updated and your patrons will receive reminders and overdue notices while you are closed.

- [Emergency Closure Written Instructions](#)
- [PINES Academy Class on Library Closures \(0.5 CEUs\)](#)

## Temporary Digital-Only Cards

The PINES Executive Committee did not approve this specifically for remote registrations, but we do think this is currently a viable option due to the circumstances.

1. When creating the patron record, select "Digital Only" instead of "Patron."

2. Add a Note (using “Apply Penalty/Message”) to the patron's account that ID was not verified and that if the patron wanted to convert their digital only card to full access with checkouts, or wished to renew the card after it expires, staff will need to verify ID and proof of address.

Example of the process worked out by MGRL:

1. Patron fills out the online application that is available on the OPAC. They may find that page by browsing, by following a direct link from the library's web site, or by clicking on a scannable QR code that the library has posted on their outside doors.
2. Library staff checks the list of pending registrations several times per week and performs normal duplicate checking.
3. Library staff then calls the patron to check that the contact information is valid and confirms details to complete the account registration as a Digital Only card. They provide the patron with the card number and PIN, and explain what resources are currently available to them. They also provide instructions on how to turn it into a full access card when the physical locations reopen.
4. Library staff then clips the physical card to the pending patron application and puts in a folder in alphabetical order. For easy access when this is all complete.

## Contact-Free Credit Card Payments

If your library is not taking online payments, you may wish to register with Stripe to be able to accept payments through the OPAC.

- [Instructions for registering with Stripe](#)

## Collections

Libraries using Unique may want to contact Unique to suspend collections activity for a period of time.

## Ideas for projects for staff to do while the library is closed to the public

Please contact the [Help Desk](#) if you have questions about how to tackle any of these projects, or others.

- Collection maintenance projects (if staff are coming in to the library)
  - [Inventory](#)
  - Weeding
  - Search shelves for items in Missing or Claims Returned or “Canceled Transit” status (run a report for your library from Quick Reports > items > List of Items by Status)
  - Search shelves for items that have been in the In Transit status for a long time (2 months+)
  - Search shelves for items with “In Process” status older than 15-30 days
- Bibliographic data cleanup projects

- Resolve items with no circ mod
- Clean up old or incorrect locations
- Resolve items in discard/weed status
- Catch up on deleting holdings in OCLC's WorldCat
- Resolve bad bibliographic records by merging, overlaying, or transferring holdings
- Locate multivolume records and assign parts labels
- Resolve precats
- Patron data cleanup projects
  - Identify duplicate accounts that should be merged (contact the help desk if you are interested in working on this project)
  - Correct format of drivers licenses that were entered incorrectly (for example, GADL instead of GA-) (use the patron search form filtered by your library to identify these)
  - Remove "NMN" that was entered in the middle name fields (use the patron search form filtered by your library to identify these)
  - Update non-DL IDs that were entered incorrectly (see best practices at: [https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:reg\\_field\\_desc](https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:reg_field_desc))
- Staff cleanup projects for Local Admins
  - Review all staff accounts to be sure they are up to date - if there are old staff accounts that are no longer being used, deactivate them (change the permission group to Patron, and verify that it is expired and inactive)
- ACQ: resolve items on-order longer than 6 months
- ACQ: Check for any open invoices from this FY
- Review the circulation manual and suggest updates/clarifications (contact the help desk if you are interested in working on this project)
- Evergreen software testing (for bug fixes and new features - contact the help desk if you are interested in participating)

## Useful Links

- Broadband Access: <https://sites.google.com/georgialibraries.org/galibtech/broadband/public-access-during-covid-19>
- G Suite Training: <https://galibtech.georgialibraries.org/cloud/g-suite/g-suite-user-training/hangouts-and-meet>
- Georgia PINES Academy: <https://my.nicheacademy.com/pines>
- Help Desk: <https://help.georgialibraries.org> or [help@help.georgialibraries.org](mailto:help@help.georgialibraries.org)

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