

Curbside Pickup Module

Enabling Curbside Pickup

Curbside pickup functionality was added with the 3.6.1 upgrade in January, 2021. Usage of this module is optional and can be enabled either at the branch level or the system level. To enable the functionality, submit a [Help Desk](#) ticket with the following information:

1. The Library System or Branch to enable it for
2. The maximum number of possible pickups per pickup time slot
3. The duration of the pickup time slots (15 minutes, 30 minutes, 1 hour, etc.)

Assumptions

Curbside pickup assumes a few things.

1. Curbside pickup has been enabled for the library system or branch.
2. A staff member must be assigned to monitor the appointments for the day.
3. The library's hold shelf in PINES must agree with what is on the physical holds shelf.
4. You have a work table / area set up to place the items that should be picked up in the next time slots.
5. Only items that are placed on hold and ready for pickup are available for appointments and checkouts through the curbside pickup module.
6. It also assumes that patrons with appointments will have their items checked out from the Curbside interface, and not from the standard checkout interface. If a patron has a Curbside appointment, but decides to come in and check out from the desk or from a self-check machine, this can lead to an "empty" appointment in the Curbside interface. This will not hurt anything, but it may be confusing.

Workflow

Video demonstration of curbside pickup

Open "Curbside Pickup" by clicking on the circulation menu. Go to the bottom of the menu to find it. (If you cannot see the full menu, you may need to scroll down or press the Ctrl key and the "-" (minus) key to zoom out. If you do this, you can use Ctrl and + (plus) to zoom back in.)

There are 5 tabs on the curbside window:

1. To Be Staged
2. Staged and Ready
3. Patron Is Outside

4. Delivered Today
5. Schedule Pickup

1. Schedule a Pickup

Currently, a pickup must be scheduled by phone. When a hold is ready to be picked up, an email notification will be sent to the patron's address on file informing them that curbside pickup is available for your location and they can call to set up an appointment. (The phone number included in the message will be the main phone number that is set in the PINES database.) Please note that the emails are sent from the server in batches, so it may take up to an hour for the email to be sent out. If the location is *only* doing curbside pickup, then staff may need to call those patrons who have not yet called in.

When you are speaking to the patron, open the "Schedule Pickup" tab and enter the patron barcode number. After entering the patron card number, the patron name will display along with the number of holds available for that patron at your location.

Click the "Make New Appointment" to select an appointment date and then time slot. The number beside the time shows the remaining appointments for that time slot. Appointments can only be scheduled during normal operating hours. There is also a box for notes should any need to be entered - for instance, you may want to enter a description of the car / license plate number so that the patron will not have to call in when they arrive. Click the "Save" button. The appointment has now been scheduled. A confirmation will be displayed in the bottom right corner of the screen.

An email confirmation will automatically be sent to the patron's email address on file.



Development is currently under way to add appointment-scheduling functionality to the OPAC so that patrons will be able to schedule appointments without calling the library, but this functionality is not yet available.

2. Retrieve Items

Open the "To Be Staged" tab to retrieve the holds needed to fill the appointments in the next ten time slots. (If your time slots are set to 15 minutes, you will only see a list of holds for the next 2 1/2 hours - if your time slots are set to 1 hour, you will see holds to retrieve for the next ten hours.)

Retrieve the listed items, and place them in your curbside pickup work area. Then select them on the list and click "Mark Staged and Ready for Pickup."

The Staged and Ready tab shows which holds have already been placed in the curbside area and are ready for pickup.



If more than one staff member is working on curbside pickups the staff members can "claim" the patron to prevent others from trying to pull the same items. Click on the "Claim" button to claim that patron's pickup.

3. Mark Patron Arrival (Optional)

Depending on your library's setup, you may want your patrons to call in when they arrive and your curbside pickup staff person may not be the person who answers the phone. If this is the case, whoever answers the phone can go to the Staged and Ready tab and click "Mark as Patron Arrived."

The curbside pickup interface will refresh itself every 15 minutes, but can be updated more quickly by refreshing the browser page. So, if the curbside pickup staff person is in a different area than the staff person answering the phone, the curbside pickup person may want to refresh the browser page more frequently to see which patron has pulled up and called in.

If the curbside pickup staff person is also receiving the phone call or has another way of knowing which patron has pulled up, then the "Mark as Patron Arrived" action is not required.

4. Check Items Out

If your local workflow is to mark patrons as arrived (see step 3, above), then the Patron is Outside tab will show you which patrons are waiting outside. If you are using this function, select the items for the patron and click "Checkout Items and Mark as Delivered."

If you are *not* using the mark patrons as arrived function, you can check items out to a waiting patron by going to the Staged and Ready tab, then selecting the items and clicking "Checkout Items and Mark as Delivered."

Items should not be checked out to the patron until the patron has arrived.

5. Deliver the Items

Deliver the items to the waiting patron.

The Delivered Today tab will show which patrons and items were picked up via curbside today.

Rescheduling

To reschedule an existing pickup appointment, go to the Schedule Pickup tab and enter the patron barcode. The patron's existing appointment should appear and be editable.



Development is currently underway to allow patrons to see their appointments and reschedule them through the OPAC themselves, but is not yet available.

More Information

More detailed information is available in the Evergreen software documentation at:
https://docs.evergreen-ils.org/eg/docs/latest/circulation/curbside_pickup.html

Video demonstration at: <https://my.nicheacademy.com/pines/course/24107>

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

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