

Name:
Position:
Start Date:

Training Checklist

Independent Training

- Email set-up (instructions should have been sent to your personal email - see Morgan if not)
- Complete "Getting to Know You" form: <https://bit.ly/33GMN6C>
- Review the Policies & Procedures Manual (found on osawatomi.library.org)
 - Special Attention to Pages: 2, 15-29, 31-49, 57-58, 60-61, 63, 72-73, 75-77
 - You are not expected to know any of this by heart, but familiarity will make it easier to find the information later and/or recall it during training

Director/Assistant Director Training

- Staff Introductions
- Review the Policies & Procedures Manual
- Submitting time off/schedule requests
- PayChex

Clerk Training

First Two Weeks

- PayChex
- Phone Etiquette/Customer Service
- Checkout Process/KOHA use
 - Checkout Limits
- Courier bagging
- Fees for services
- Opening and Closing Procedures - always on time!
- Keys
- Location of supplies
- Elevator Operation

First Month

- MakerSpace equipment
- Cataloging
- Agent/ILL

Children's Clerks

- Story Times
- Gaming use

Library Clerk Information

KOHA

Username: osawtech

Password: keepkansasclean!

General Tasks

Tally each patron who enters the library
Note first name of any patron using a computer
Children's books go in the red tub in the hallway
Alert Morgan to any supplies running low
Straighten books and DVDs on shelves
Check that materials are correctly shelved

Checking Books Out

Search by name or scan their library card
Check for red notes and/or accounting holds
Verify contact information if card has expired
Limits: 10 books
5 DVDs (only 1 series)

Library Card Applications

Provide patron with application
Request to see identification and proof of address
Enter into KOHA:
Click on Patrons at the top left
Search the patron's name to be sure they don't have a card already
Click on New Patron - choose child if under 18, otherwise Adult
Enter required information carefully
Give patron their library card and bookmark of library information
New patrons are limited to two items at their first checkout

****State Library Card information is on the bottom shelf between the computers****

Print/Copy/Scan/Fax

B&W \$0.05 per page
Color \$0.10 per page
Faxes \$0.50 per page
Headphones \$1.00

Write down transaction amounts on the clipboard between the computers and under the countertop. Put money in the cash drawer

Pick-List

- Run first thing and then every two hours as possible
- Open the "Holds Pick List" shortcut on the desktop
 - Circulation
 - Holds queue
 - Osawatomie Public Library → Submit
 - Export → Print (optional - you can also work from the screen)
- Retrieve Items (New children's books do not go out until they have been here one week)
- Check the items IN
- Print slip for Patron/Library
- Place Holds in Designated Spot
 - Osawatomie - back counter
 - Other Libraries - work room table

Courier

- Incoming Bags:
 - Check in all books from the bags
 - Recycle Osawatomie bag labels and receipts in books
 - Print slips for holds for Osawatomie patrons
 - Place holds in designated spot
 - Call patrons who have received books
 - We will hold for 7 days before returning
 - Reshelve returns
- Outgoing Bags:
 - Place items for each library in a separate bag with label
 - DVDs go inside bubble mailers
 - Count small & large bags separately and write tally on sheet on the cabinet
 - Place all bags inside courier bins
 - Place bins on rolling cart near the back door before leaving

Opening

- Unlock front door
- Get books from drop box & check in
 - Only print tickets if going somewhere other than home library
- Water Plants on Wednesdays
- Check to ensure printer has enough paper

Closing

- Lock door (after checking bathrooms)
- Count out cash from sheet if exceeding \$5, place in envelope in Morgan's tray
- Tally visitors and computer users
- Restart patron computers

Turn out lights (except lobby)
Ensure back door closes firmly behind you