

# Staff To Do List

Below is a list of daily, weekly or monthly obligations of each library. Staff needs to do these to create a harmonious Circulation System and to provide the best possible patron service.

## Scheduled Reports

- ☐ Available Holds List (twice a week) - This is a list of items that are in the Location of **Hold**. This list should match the items on the holds shelf in the library. Items on hold for more than specified timeframe (3-5 days) should be removed from the shelf and returned to the library or to the shelf, and the patron's hold removed from the record.
- ☐ Overdue notices (weekly) - The report generates overdue notices to notify the patrons of overdue items (7 days past due). To find out who did not get email notification, when opening the report, select to view only those with no email addresses. Uncheck view log. You may now choose to copy and paste the messages for mailing, call the person... or do nothing.
- ☐ Overdue Call List (weekly) - The report generates a list of overdue items 7 days past the Due Date and older.
- ☐ Billing notice (Weekly) - The report generates billing notices to patrons with overdue items (30 days past due) by email. To find out who did not get email notification, when opening the report, select to view only those with no email addresses. Uncheck view log. The library may choose to contact them in an alternate way.
- ☐ Assumed Lost (Weekly) --The report generates a bill notices to patrons with overdue items (45 days past due) by email. The report also generates a bill for the checked out item and no longer displays the item under check out. To find out who did not get email notification, when opening the report, select to view only those with no email addresses. Uncheck view log. The library may choose to contact them in an alternate way.
- ☐ Monthly Reports (monthly) – use these statistics for NYS Annual reports, Board meetings, Reports to the Community, and to review daily activity for gauging improvements and/or changes.

- ☐ Holds against overdue items (monthly) - The report generates a list of holds for your patrons loaded on items that are checked out and overdue by more than a month. Staff should review these holds. If there is a chance this hold will not be filled in Workflows, remove the hold and notify the patron. You might want to try getting it through ICICILL.
- ☐ Holds not being filled (monthly) - The report generates a list of holds loaded on items more than two months that have not been filled. Staff should review these holds. If the reason is anything other than the book is in high demand, you might want to try getting it through ICICILL. If the hold will not be filled through Workflows, remove the hold and notify the patron.
- ☐ Items assigned "NEW" Item Types (monthly) – The report generates a list of items with an item type of "new" (A-FIC-NEW, etc.) that were created over a specified timeframe (ex. 3 months) ago. Change the item type from NEW status. *Example: A-FIC-NEWB to A-FIC*
- ☐ Items that are Missing (monthly) – The report generates a list of items checked out to the User MISSING. The staff y need to be changed and updated

### **Reports run by library staff**

- ☐ .Items that are Damaged or in Processing (monthly) –run a report and review the items in these locations. They need to be changed and updated
- ☐ Items recently barcoded (monthly or weekly) –run a report to double check item records added recently. Review the list for correct Item Types, Locations & Call Numbers.
- ☐ Patrons recently registered (monthly or weekly) –run a report to double checked patron records that were added recently. Look for complete information and correct format in the data. *Example: all fields are completed, phone is entered 315-788-1234, no unnecessary punctuation.*

## WorkFlows WIZARDS

- ☐ OnShelf Items List (daily) – every day the library is open staff should access the OnShelf items list through the wizard on the Holds menu. The list contains items that need to be pulled from the shelf to fill a hold. Unfill any items the library cannot fill and/or mark item MISSING. When marking items MISSING, make sure to check if the item is the only automated copy. If so email the patron's library that the hold will not be filled.
- ☐ Pending Transits List (after every NCLS delivery) – review the Pending list located on the In-Transit-Items menu after all items are processed from the NCLS delivery. Investigate any items that should have been in the delivery. Email or call the sending library.

### **OTHER tasks**

- ☐ Invalid emails (Daily) -when these are received in your email, please contact your patron for verification of his email address. Sometimes these emails that bounce back are associated with a notification of an item that has arrived for pickup. You should check his account before calling him. If you cannot reach him, change the EMAIL field to BADEMAIL.
- ☐ Library Notice (Daily) -when a "library notice" email is forwarded to the library from NCLS, it usually has a message from a patron asking for renewal of items. Please take care of these promptly to avoid fines. In some cases it comes from a person (NOT your patron) who is saying the message was sent to the wrong email address. Please act promptly on these to remove the email address from your patron's account before a second email is sent, and contact your patron for the correct address.