SWAN Fireside Chat

May 26, 2020

Topics

• Action Recap: Digital Cards extended, Overdue, courtesy, auto-renewal notifications returning June 1
  • Customized Checkout Receipt

• Questions
  • Can we extend due dates based on item type
  • Is the $100 limit block still in effect for digital access

• Timeline for restarting reports

• Curbside Communicator
  • Integrated into BLUEcloud Mobile app

• Reopening – Safety First

• By the numbers

• SWAN eXpo 2020 Web Series
Action Recap

• [ALERT] Overdue, courtesy, autorenewal notices set to restart June 1
• [NEW] Digital-only cards extended to August 31, 2020

• Local Holds Only (until delivery resumes)
• Holds suspended until June 8, 2020 (unless offering curbside)
• Due Dates extended to at least 6/3/2020 (Public Libraries)
  • Library specific requests processed
• Patron record expiration dates updated to 7/4/2020 (for any user accounts expiring between 1/1/2020-6/30/2020)
• Notices, billing, collection – all suspended
• Holds with an expiration date of March 16 – September 6, updated to September 7, 2020.

Customized Checkout Receipt

• SWAN IT will work with libraries on customization as requests for services submitted
• Receipt should be emailed to patron when preparing curbside/drive-up materials
Q: Can we extended due dates by item type?

A: Due date extensions can be arranged for all items.

Specific due date extension based on item types or other factors is not recommended.

If your library is concerned about volume of material returned based on a specific due date, we recommend the following:

1. Extend due dates further into the future for all items currently checked out
2. Communicate with patrons to return material at their convenience and that due dates have been extended
3. Request that material be returned via book drop when open, staff appropriately to ensure no overflow

Q: Is the $100 limit for blocks still in effect?

A: Nightly a report is run to change any patron status of blocked, owing < $100 to OK

Any WorkFlows action recalculates status, so the patron will again be blocked if record is accessed in WorkFlows

E-Content vendor settings determine if bill threshold is checked in addition to status

Consider extension of access to digital content:

1. Work with E-Content vendors to review and loosen blocking thresholds
2. OverDrive: login to Marketplace > Select Support > Authentication Support > Card Rule (use drop down)
This ticket made us jump for joy.

“As a thank you for all of SWAN's hard work, we would like to offer curbside services to SWAN employees.”

Timeline for restarting notices/billing

- **June 1**: Overdue, Courtesy, Autorenewal Notices
- **June 8**: Custom Long Overdue (removes lost items > 365 overdue)
- **July 6**: Billing Notices
- **July 27**: Collection Reports
- **Tied to Phase 4**: Hold Notices (not until resource sharing restarts)
Curbside Communicator

• As of May 24th, Curbside Communicator is live for 30 SWAN libraries
• Interested in using the tool for your patron communication? Let us know by opting-in when submitting your Opening Date & Services request form.
• Watch for a welcome email from Unique indicating your designated Curbside Communicator web address and SMS text number.
• Easy-to-access links can be included in:
  • Enterprise banner
  • BLUEcloud Mobile app
  • Email receipts

Getting to Know Curbside Communicator

[https://support.swanlibraries.net/tutorial/73068](https://support.swanlibraries.net/tutorial/73068)
Reopening – SWAN Member Spotlight: Elmwood Park Public Library

Illinois Department of Commerce & Economic Opportunity
SWAN PPE Curbside

- Using SWAN as bulk-purchaser
- PPE ordered for SWAN library purchase
  - Liquid surface sanitizer
  - Hand gel
  - Masks
  - Gloves
  - Face shields

https://support.swanlibraries.net/documentation/71395

- Complete supply order form
- Supply preferred date for pick-up & time
- Wait for confirmation from Ginny
Checkouts March 1-May 23

Checkins – March 1- May 23 (excluding weekends)
Online Card Registrations > 50

3,564 total as of 5/23

Your idea here!
SWAN eXpo 2020 Web Series

Submit a presentation idea -
Providing Virtual Outreach Services

Join the Outreach Services team, David Kelsey and Lynda Spraner, from the St. Charles Public Library in sharing virtual outreach services in this time of limited physical contact.

Knowing that our seniors and homebound patrons rely not only on the physical items shared by our libraries, but through programs and personal engagement, some creative solutions have allowed us to stay in touch and connected.

SWAN eXpo 2020 Web Series
Using Collection HQ for Collection Development & Decision Making

Join Ang Romano, Fiction and Reference Librarian, Oak Lawn Public Library for a demonstration and discussion on Collection HQ. Ang will share how Collection HQ helps in their collection analysis and development, including data-driven decision making.
Library Check List
https://support.swanlibraries.net/documentation/72662

- **Opening Date & Services Request Form** - supply dates on offering Curbside/Home Delivery services, as well as interest in Curbside Communicator
- **Due Date Extension Request Form** - request due dates to be extended past June 3, indicate book drop opening dates
- **Online PPE Order Form** - SWAN can help with some supplies required for readiness in offering services

### Curbside Information

<table>
<thead>
<tr>
<th>Library</th>
<th>Curbside Pickup?</th>
<th>Curbside Communicator</th>
<th>Book Drop</th>
<th>Fine Free</th>
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Fireside Chats – moving to the Poolside

- June 9, 23 (every other week)
- Will determine July
Questions & Follow-up

Send questions to our online ticketing system at help@swanlibraries.net

Visit the SWAN Support Site for access to recorded sessions.
https://support.swanlibraries.net

Submit a request for additional training topics.
Help > Request Forms > Request Training or Consultation