Topics

- **Action Recap:**
  - Timeline for restarting reports
- PPE
- Notices & Notifications
- Online Patron Registration
- Managing Holds
- Optional workflows
  - QUARANTINE in-house user (check-in before quarantine)
  - CURBSIDE in-house user (checkout after quarantine)
- Curbside Update
- L2 Update
- Resuming Resource Sharing
- REALM Study – Phase 1 Results
- RAILS Delivery Resumes
- Illinois Phase 4 - Reopening
  - PPE Needs?
- EBSCO Update
- By the numbers
- SWAN eXpo 2020 Web Series

Action Recap & Reminders

- **[ALERT] Local Holds Only (phased resumption starting 7/7)**
  - Holds placed by CHICAGO_P & NONSWAN_RB profiles will no longer be automatically suspended after 7/7 (local decision on whether to fill)
- **[NEW] Patron records with expiration dates between 1/1/2020-9/7/2020 extended to 9/8/2020 (some libraries excluded specific profiles)**
- **[NEW] 1st Overdue notices now sent at 14-days overdue instead of 7**
- Overdue notices started June 9
- Courtesy, autorenewal notices started June 1
- Suspended holds now active (previously extended to June 8)
- Online-only cards extended to August 31, 2020
- Unfilled holds with an expiration date of March 16 – September 6, updated to 9/7/2020
Notices & Notifications

https://support.swanlibraries.net/documentation/64674

1st Overdue (send at 14 days instead of 7 days overdue)

Text Notice:
You have overdue library item(s). Please disregard this notice if you returned your material in the past week; items are quarantined before checkin.

Email Notice:
**1ST OVERDUE NOTICE**
Please disregard this notice if you returned your material in the past week. All material is held in quarantine before being checked in.
The following item(s) are now overdue. Please return the item(s) below to avoid potential fines.
Thank you!
**Do not reply to this email**

Print Notice (will not be printed/mailed until at least August):
Please disregard this notice if you returned your material in the past week. All material is held in quarantine before being checked in.
The following item(s) are now overdue. Please return the item(s) below to avoid potential fines.
Thank you!
Did you know that you can opt in to receive notices like these via email or text? Contact your library for additional information, or to change your preferences.

For Fine Free libraries who are blocking patrons based on number of items immediately overdue, review impact of quarantine. If desired, limits can be modified.

Restarting Hold Pick-Up Notices

https://support.swanlibraries.net/forms/75250

• Opt-in to restart your hold pick-up notices
• Hold pick-up notices can resume on Wednesdays starting 7/1
• Hold pick-up notices will run once a day at 2:00 PM (plan your processes to either take advantage or avoid notifications)
Managing Holds – “We are swamped”

Strategies for managing long hold queues.

• Process hold queue daily; but consider a rotation on patron last name range to process per day, reducing the number of patron pick-up days/bags.

• Consider reasonable number of items patron can use within check-out period.

• Reduce number of holds patron can place. While this will not impact the backlog, it will slow hold placement a bit moving forward.
Optional Workflows

QUARANTINE in-house user
• Use to clear items off patron records
• Checkout to user when emptying book drops
• Quarantine items
• Check-in items post-quarantine
QUARANTINE items do not appear on holds list

CURBSIDE in-house user
• Use to remove hold pickup status
• Checkout to user when hold is trapped to remove My Account messaging that hold is ready for pickup
• Either reshelve or put in temporary location to wait for holds list
CURBSIDE items appear on holds list

Updating Online Patron User Records
https://support.swanlibraries.net/documentation/68769

Online User Only Card
• Do not update barcode or create a new record
• Update privilege expiration date in the existing record to match normal library policy, (ex. 3 years, NEVER)
• Do not issue a physical card

Full Access Library Card
• Check for duplicate record - duplicate accounts are not permitted unless they are a child with dual residency or a student with an academic card
• Modify existing record
  • Update patron profile
  • Update privilege expiration date
  • Fill in all fields required by local library practice
• Create a physical card - Do NOT mail card prior to contacting the patron

Fun Fact: 52 ONLINE accounts created yesterday
Curbside

https://support.swanlibraries.net/members/curbside-information

• 56 libraries currently configured for Curbside Communicator
• 19 libraries using another method of communication
• If you initially opted in to use Curbside Communication, but have implemented another solution, please let us know if we can cancel Curbside Communicator for your library to save on costs.

L2 – RAILS Relaunch in mid-August

• All SWAN events through end of December have been moved to virtual spaces
• GoToWebinar will handle registrations – be sure to register in advance for personal link to event and receive reminders
• Library staff and directory information must be reviewed/updated by July 31st (we recommend by July 15th)
  • Request removal of erroneous/duplicate staff accounts if you are not able to update
  • If you have maintained learning logs, those must be saved as a print or PDF (My Events)
• SWAN events will still be visible on the SWAN Support Site
6/23 - Timeline for restart of ILL/RBP

- Overdue, Courtesy, Autorenewal Notices
  - June 1

- Resume Hold Notifications 7/1, 7/8, 7/15, 7/29, 8/5, 8/12, 8/19, 8/26, 9/2

- Billing Notices
  - July 6

- Collection Reports
  - July 27

- RBP Resumes & full ILL
  - Sept 9

- Custom Long Overdue (removes lost items > 365 overdue)
  - June 26

- ILL in SWAN starts for some
  - July 7 for some

- ILL in SWAN for some
  - Aug 12

- Resume Hold Notifications
  - 6/22 Reports sent and News Post Reminder for final Shelf Check

NOTE: 39 libraries did not respond

Resuming Resource Sharing

Interlibrary Loan

Given the choices below, which date would you prefer to resume full resource sharing? This means your items would return to pre-COVID holdability rules within the consortium and you would be willing to share your collections through interlibrary loan to other SWAN libraries.

- July 7 (no earlier than)
- August 12 (no earlier than)
- September 9 (no earlier than)

53 responses in 53 results

Reciprocal Borrowing

When would your library like to provide reciprocal borrowing privileges to other patrons? This means patrons would be able to place holds for pick-up at your library who are outside your service area.

- July 7 (no earlier than)
- August 12 (no earlier than)
- September 9 (no earlier than)

53 responses in 53 results
REALM Study – Phase 1 Results

Phase 1 research tested:
1. Hardback book cover (buckram cloth)
2. Softback book cover
3. Plain paper pages inside a closed book
5. DVD case

Results show that the SARS-CoV-2 virus was not detectable on the materials after three days of quarantine.


RAILS Resumes Delivery Schedule June 29

• Blue bins only (request additional, if needed)
• Every item labeled
• Contactless delivery (not within staff areas)
• Items quarantined before pick-up (look for RAILS announcement) – staff wearing PPE to handle items is considered “clean” and does not require additional quarantine time.
• Empty bins immediately upon receipt, follow local practice.
• Wipe down bin before returning to delivery.
Illinois – Phase 4, June 26th

<table>
<thead>
<tr>
<th>Service/Access Tier</th>
<th>Phase 1</th>
<th>Phase 2</th>
<th>Phase 3</th>
<th>Phase 4</th>
<th>Phase 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities</td>
<td>Library facilities closed to the public</td>
<td>Library facilities open for limited staff provided services</td>
<td>Library facilities open for limited patron services</td>
<td>Library facilities open &amp; majority of library services are reintroduced</td>
<td>Libraries return to 100% pandemic free services</td>
</tr>
<tr>
<td>Delivery</td>
<td>ILL delivery between libraries suspended</td>
<td>ILL delivery between libraries suspended</td>
<td>ILL delivery between libraries suspended</td>
<td>ILL &amp; reciprocal borrowing active</td>
<td>ILL &amp; reciprocal borrowing active</td>
</tr>
<tr>
<td>Services</td>
<td>Library facilities closed, virtual services</td>
<td>Library facility provides curbside, home delivery, open limited hours, PPE supplied to staff, virtual services</td>
<td>Same as phase 2, with library staff checking out locally available materials, limited facility will use, limited access to open stacks</td>
<td>Library staff are checking out local and transited materials</td>
<td>Same as phase 4, with home delivery migrated into Outreach Services model</td>
</tr>
<tr>
<td>ILS Days Closed</td>
<td>Days closed set for libraries</td>
<td>Days closed updated to limited days libraries open</td>
<td>Same as phase 2</td>
<td>Days closed schedule returns to normal</td>
<td>Same as phase 4</td>
</tr>
<tr>
<td>ILS Holds/Requests</td>
<td>Patrons can place requests but are suspended via automated script</td>
<td>Patrons can place requests but only on local library material; requests denied on other library collections</td>
<td>Same as phase 2</td>
<td>Return to patron requests on all permitted library collections</td>
<td>Same as phase 4</td>
</tr>
<tr>
<td>Patron Notification</td>
<td>Patron notifications and billing via email, text, telephony, and print remain suspended</td>
<td>Same as phase 1</td>
<td>Hold notification enabled for libraries that allow patron self-service of requested items, e.g., open hold shelf</td>
<td>Notices, billing, collection reports return to normal schedules</td>
<td>Same as phase 4</td>
</tr>
<tr>
<td>Material Due Dates</td>
<td>Due dates are extended to a single fixed date for all closed libraries</td>
<td>Due dates are extended per library based on reopening plan</td>
<td>Same as phase 1</td>
<td>Circulation rules return to normal processing (no system-wide extensions)</td>
<td>Same as phase 4</td>
</tr>
<tr>
<td>Library Cards</td>
<td>Card expirations are extended to a single fixed date</td>
<td>Same as phase 1</td>
<td>Same as phase 1</td>
<td>Card expirations return to normal processing (non-system-wide extensions)</td>
<td>Same as phase 4</td>
</tr>
<tr>
<td>OCLC ILL</td>
<td>OCLC set as non-supplier</td>
<td>Same as phase 1</td>
<td>Same as phase 1</td>
<td>OCLC returns to supplier status</td>
<td>Same as phase 4</td>
</tr>
<tr>
<td>Patron Status</td>
<td>Patrons with a status of either delinquent or blocked who owe less than $100 have their status changed to OK through a nightly scripted task</td>
<td>Same as phase 1</td>
<td>Same as phase 1</td>
<td>Patron blocks and limits are put back in place</td>
<td>Same as phase 4</td>
</tr>
</tbody>
</table>

Libraries Reopening

Let us know! Submit a help ticket to indicate date opening for patrons.

Questions we will ask:
- Are you continuing curbside?
- Do we need to adjust FF4NOW rules?
- Special Enterprise banner changes?
- Did you shadow collections that you want to unshadow?
- Did you open up browsing collections for holds that now should be restricted?

If your doors are open, you can circulate anything to anyone you allow into your building. The system is ready now to support reopening when your doors open.

We will turn on resource sharing in groups on set dates.
SWAN PPE Curbside

Order PPE Supplies from SWAN

SWAN now has a supply of personal protective equipment (PPE) for libraries to request and arrange for curbside pickup. The pick up days are Tuesday and Thursday 12-3pm. We are unable to ship any of these orders, and you will be able to schedule the pickup time at our Westmont headquarters within the online order form. Your library will be invoiced by SWAN after July 1st.

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

- Complete supply order form
- Supply preferred date for pick-up & time
- Wait for confirmation from Ginny

EBSCO Group Purchase Go Live July 8th

https://support.swanlibraries.net/news/2020-06/75030

Search Article Search for most of your databases. Consumer Reports, Consumer Health, Novelist, and Auto Repair are not integrated into Article Search, but will be shown as “Also See...” references in Enterprise.

Standard SWAN-wide database will also be included as search recommendations.
EBSCO Databases SWAN Group Purchase Update

• Sign up on L2
  https://www.librarylearning.info/events/?eventId=31583

Don’t miss the buzz....

EBSCO Resources on the SWAN Support Site

• Documentation > E-Resources > SWAN EBSCO Databases
  https://support.swanlibraries.net/documentation/70949

• Tutorials and training from EBSCO Connect listed by interface

What databases does my library have?
Starting in July & thereafter, a list of your EBSCO database package and links will be available on the SWAN portal site, which you can share directly with your patrons or use to manage your own database directory for your patrons.

Tutorials and training
EBSCO Connect offers:
• Tutorials for specific databases.
• Live training via WebEx.

Article Search training presented by SWAN staff can be found in the Meetings and Training section of this support site.

Promotional materials
• EBSCO Connect provides a set of printable, social media, and other promotional material for individual databases
  • New databases-graphic with text, 1200px by 650px (PNG) - sized for Facebook and web
  • New databases-graphic square with no text, 650px by 650px (PNG) - sized for Facebook, Twitter, Instagram, and web
  • New databases-graphic large with text (PNG) - sized for you to crop for your website
  • New databases-graphic large with no text (PNG) - sized for you to crop for your website
Patron Resources & Access to Databases

https://swanlibraries.net/articles-databases/

Promotional Graphics Available

• EBSCO provides graphics on EBSCO Connect and you can find a link to those on the SWAN EBSCO Databases page of the Support Site
• SWAN created graphics can be found there as well.
Checkouts May 1-June 22 (weekends excluded)

Check-ins – May 1-June 21 (weekends excluded)
Circulation Comparison 2019 vs 2020 (~20%)

Checkouts in last 14 days

2 libraries > 5,000 checkouts
30 libraries > 1,000 checkouts
50 libraries > 500 checkouts
75 libraries > 100 checkouts
These days we’re all learning on the fly. Pioneering new ways to meet our patrons where they are and in ways that were unimaginable six months ago. This isn’t always comfortable or easy but it’s turning out that ingenuity and enthusiasm can, in many ways, make up for lack of experience. With that in mind, we need to get past the idea that we can’t be authorities on a subject just because the format is suddenly so very different. Join colleagues for a discussion on facilitating and joining online book clubs. From selection to facilitation to technology, we will share their experiences and encourage others to discuss how they are working in a virtual world to keep book clubs thriving.

Library Check List

[https://support.swanlibraries.net/documentation/71031](https://support.swanlibraries.net/documentation/71031)

- Submit help ticket – Let us know you are reopening for patrons in the building.
- **Restart Hold Notifications** - Hold Notifications will restart on Wednesdays. Select your date for requesting restart.
- Check IL Dept of Commerce Guidelines
- **Online PPE Order Form** - SWAN can help with some supplies required for readiness in offering services.

**Reopening Plans**

*Illinois moves to Phase 4 on June 26, 2020*

As Illinois moves into Phase 4, many SWAN libraries are opening their doors for patrons to visit the library. If your library is reopening for patron access to the building, please let us know by submitting a help ticket. Also refer to the following work request forms to prepare for return to service.

- **Restart Hold Notifications Work Request** - indicate which date (Wednesday through September 9th) you wish to have hold pick-up notifications turned on for your libraries. Once turned on, patrons will be notified via a daily run at 2:00 PM that they have holds ready for pick-up.
- Review procedures from the Illinois Department of Commerce on Phase 4 guidelines. Pay particular attention to Service Counter Preparedness.
- Verify that you have adequate PPE for staff. If you have not already secured a continuous source for PPE supplies, SWAN can help with some supplies. See our Online PPE Order form.
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