

## Interview Questions – PT Guest Services Associate

|             |                |
|-------------|----------------|
| INTERVIEWEE |                |
| POSITION    | GS Associate   |
| DEPT.       | Guest Services |

|              |  |
|--------------|--|
| INTERVIEWERS |  |
| DATE         |  |

### REVIEW THE FOLLOWING

- Job description (give applicant copy and time to review and ask questions)
  - Review staff organization chart and explain how position fits into the Library
  - Review benefits (paid sick and vacation, health insurance)
  - Review our Culture Statement
  - Explain when/who will be asking them questions in another language if applicable
1. Why do you believe you are a good fit for this position and the Addison Public Library?
  2. Which of your skills do you think would be the most essential to success in this position?
  3. Describe a time when your team or organization was undergoing some change. How did that impact you, and how did you adapt?
  4. We all make mistakes we wish we could take back. Tell us about a time you wish you'd handled a situation differently with a colleague or customer.
  5. Give us an example of a time you managed numerous tasks that occurred at the same time. How did you handle that?
  6. Describe your computer skills, what software you are comfortable using, and how you adjust to technological changes.
  7. In what ways has your career benefited from working with or being exposed to diverse backgrounds and experiences?

8. The community of Addison is diverse. Many different languages are spoken here, such as Spanish and Polish. How would you approach working with a patron who speaks a language you do not understand?
9. Tell us about a time you had to interact with a patron or customer whose behavior was inappropriate.
10. Scenario: A group of teens are being loud and running in the lobby. They are given a warning and asked to be quieter and stop running. A few minutes later, the same group of teens are loud and running again. How would you approach them the second time around?
11. Scenario: A patron/customer is being charged \$15.00 for a lost item on their account. They come to the desk demanding that the charge and item be removed. How would you deal with the situation?
12. What attracts you to working in Guest Services?
13. If hired, when would you be able to start?
14. Can you work the following hours?
15. Do you have any questions about the position or the Addison Public Library that we can answer?

## **Guest Services Associate Training Plan**

### **Before Arrival**

- Assign and label folder
- Print out tentative schedule
- Create welcome sign
- Open ticket to have Microsoft 365 and Jostle accounts created
- Tell GS staff about new hire
- Jostle post announcing new hire
- Email new hire the schedule for first day/week

### **Day 1 – Onboarding**

#### **Meet with HR Coordinator**

#### **Meet with Business Office Manager**

#### **Introduction to Guest Services**

- Indicate how the new staff would like to be addressed, introduce to GS staff
- Discuss schedule for the next couple of weeks
  - Print copy for new hire
- Sign-in to email account
- Print department phone list
- Create library card
- Create Lightspeed account
- Explain ADP
- Discuss attendance
- Discuss dress code
- Parking
  - Additional parking by Village
- Explanation of the next two days
- Show folder “mailbox”

#### **Tour of the Library (Buddy)**

#### **Tour of Large Meeting Room**

- Workstations
- Where to clock-in and out
- Printer/Copier

### **Day 2 – Onboarding**

#### **Continue Onboarding**

- Workplace Attitude
- Personnel
  - Meal and Rest Periods
  - Kitchen and Break Facilities
  - Safeguarding Personal Belongings

## **Guest Services Associate Training Plan**

- Performance Review
  - Goals
  - Continuing Education
  - Disciplinary Action
  - Sexual Harassment
  - Terminations
  - Visitors
  - Computer Usage
- Employee Expenses
  - Mileage Reimbursement
  - Travel Reimbursement
  - Staff Development Activities
  - Professional Memberships
  - Other library-related expenses
- Safety and Health
  - Person-in-Charge (PIC)
  - How to identify PIC for the day
  - When to notify PIC
  - Disaster / Emergency Preparedness Plan
  - Safety Orientation Checklist
  - Drug-Free Workplace Policy
  - Smoking Policy
  - Emergency Closings
- Building Operations
  - Access to building
  - Opening procedures
  - Closing procedures
  - Supervision of building
  - Supervision of department
  - Confidentiality
  - Security cameras

### **Communication**

- Email
- Teams
- Staff Intranet
- Telephone / Paging System
- Bulletin Boards
- Personnel Manuals
- Policy Manuals
- Procedure Manuals
- Mailboxes
- Newsletter
- Staff Meetings

## **Guest Services Associate Training Plan**

- Direct Supervisor
- Questions, problems, or concerns

### **WorkFlows Training**

- L2 Account
- SWAN Online Learning
- See *WorkFlows Training* documents
- See *Library Card Training* documents

### **Day 3 – Training**

#### **Continue WorkFlows Training**

### **Day 4 – Training**

#### **Continue WorkFlows Training**

- Damage and missing form
- Book donation form
- Curbside form
- Friends of the Library form
- Missing/Problem form
- Paid – Damaged form
- Paid – Lost form
- Refund form
- Shelf Check form
- RAILS slips

#### **Department Procedures and Spreadsheets**

- Bike lock spreadsheet
- Bins
- Closing script
- Home delivery form
- Lost and found
- Pay fees online
- Phone voicemail passcode
- Returns from other libraries
- Register
- Department tasks
- Email templates

### **Day 5 – Circ5 Training**

#### **Process Holds**

#### **RAILS Bins**

## Guest Services Associate Training Plan

### Supplies

- Cabinets
  - Key box
  - First aid
- Label maker
- Paper towels
- Cleaning wipes
- Paper replenished by Admin
- Notify department head when supplies are running low

### Day 6 – On Desk Training

#### Main Desk

- Library of Things cards
- Hotspots
- Video games
- Interlibrary loans
- Home delivery shelf
- Shred basket
- Lost library cards
- Circ stations
- Cash register
- Supplies
- Missing part/pieces shelf
- Damage items shelf
- RAILS bin
- Forms
- School books
- Business cards
- Curbside bags and quarter sheet
- Curbside stat sheet
- Booklist

#### Using the Phone

- Greeting
- Place call on hold
- Warm transfer vs cold transfer
- Voicemail
- Quick buttons
- Outgoing calls
- Internal calls



## New Employee Onboarding Program

|                  |                    |
|------------------|--------------------|
| <b>Name:</b>     | <b>Hire Date:</b>  |
| <b>Position:</b> | <b>Supervisor:</b> |

The orientation program is not intended or designed as a tool for training new employees on the duties specific to their position, but as a general introduction to the library. Job specific training can be begun along with the orientation program or once the orientation is complete. Supervisors should be sure to set an appropriate pace for orientation and training that will not overwhelm the new employee with too much information at once.

### **Prior to hire date: (as soon as signed offer letter is received)**

| Human Resources |                                                                                                                                             |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------|
|                 | Confirm preferred name and share that with supervisor                                                                                       |
|                 | Open Maintenance Ticket to procure key card                                                                                                 |
|                 | Submit marketing request for new nametag and business cards                                                                                 |
|                 | Email the new employee instructions for the ADP Portal, parking details, building access, dress code, and what to bring on their first day. |
|                 | Send the new employee a welcome message through the ADP system to register for their Self-Service Onboarding Portal.                        |
|                 | Set up Personnel file with application form, resume, interview notes, references, transcripts, offer letter, and other information.         |
|                 | Recruit staff buddy                                                                                                                         |
|                 | Create Niche Academy account after employee's email account is set up                                                                       |
|                 | Establish a mandatory training account and send training materials to the new employee after their email account has been set up.           |
|                 | Schedule picture for Jostle for employee's first week                                                                                       |

| Human Resources & Supervisor |                                                         |
|------------------------------|---------------------------------------------------------|
|                              | Coordinate plans and schedule for employee's first week |

| <b>Supervisor</b> |                                                                                                                                                                                                                   |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | Open IT ticket to have Office 365 and Jostle accounts set up.                                                                                                                                                     |
|                   | Ensure work area/desk for new employee is cleaned and stocked with necessary supplies for their assigned duties (pencils, pens, note pads, stapler, paper clips, etc.)                                            |
|                   | Obtain new employee's desk/locker keys from Administrative Services Manager                                                                                                                                       |
|                   | Announce new hire to staff – First to employee's department, and then to all staff via Jostle news post immediately after offer is accepted and a 2 <sup>nd</sup> reminder on the day before the employee starts. |
|                   | Email new employee to share schedule for first day and first week.                                                                                                                                                |

## **First Day**

| <b>Introduction and Paperwork - Human Resources</b> (please allow 1 hour) |                                                                                                |
|---------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
|                                                                           | Review the schedule for the day                                                                |
|                                                                           | Provide new employee with nametag and explain policy on wearing nametags                       |
|                                                                           | Issue key card and discuss access to the building and other areas where the keycard is needed. |
|                                                                           | Signed job description                                                                         |
|                                                                           | Explain Buddy program                                                                          |
|                                                                           | Federal and State W4                                                                           |
|                                                                           | Employment Eligibility Verification (I-9)                                                      |
|                                                                           | Payroll – direct deposit form                                                                  |
|                                                                           | Emergency Contact form                                                                         |
|                                                                           | Text 'em All – discuss emergency closings and send invitation email                            |
|                                                                           | (FT Employees) – Health/Life Insurance – discuss and send invitation email                     |
|                                                                           | (FT Employees) – IMRF – discuss the benefit and enrollment process                             |

|  |                                                                          |
|--|--------------------------------------------------------------------------|
|  | Register employee for background check (if not done prior to start date) |
|--|--------------------------------------------------------------------------|

| <b>Introductory Remarks - Supervisor</b> |                                                                                                                                                                                                                                                                                                                                                           |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                          | Introduce employee to others with whom they will be working. Generally, this will be staff in the same department. Extend to employees in other departments if they will be working with them on a regular basis. Focus on being descriptive of the job function, limiting yourself to one or two sentences per person and concentrating on action words. |
|                                          | Show the employee their area to work and assigned desk, etc.                                                                                                                                                                                                                                                                                              |
|                                          | Be sure the employee understands the specific duties and responsibilities of the job and what is expected.                                                                                                                                                                                                                                                |
|                                          | Explain the organizational structure and how the new employee's work group fits into the overall structure of the organization.                                                                                                                                                                                                                           |
|                                          | Review scheduled work hours and discuss attendance – what to do if you are late, sick, or absent.                                                                                                                                                                                                                                                         |
|                                          | Explain meal and rest breaks (including kitchen/break facilities)                                                                                                                                                                                                                                                                                         |
|                                          | Discuss safeguarding of personal belongings                                                                                                                                                                                                                                                                                                               |

| <b>Tour of the rest of the building – Buddy (please allow 1 hour)</b> |                                                                               |
|-----------------------------------------------------------------------|-------------------------------------------------------------------------------|
| <b>3<sup>rd</sup> Floor</b>                                           |                                                                               |
|                                                                       | Restrooms & water fountain                                                    |
|                                                                       | Staff room – refrigerator, microwave, dishwasher, kitchen duty rotation, etc. |
|                                                                       | Board Room                                                                    |
|                                                                       | North Fire Staircase                                                          |
|                                                                       | Admin Offices & Staff photocopier, fax machine                                |
|                                                                       | IT Offices                                                                    |
|                                                                       | Materials Management                                                          |
|                                                                       | Elevator (note hours of use)                                                  |
|                                                                       | South staircase                                                               |
| <b>2<sup>nd</sup> Floor</b>                                           |                                                                               |
|                                                                       | Service Desks                                                                 |
|                                                                       | Internet Workstations                                                         |
|                                                                       | Sam's Lab                                                                     |
|                                                                       | Public Printer/scanner                                                        |
|                                                                       | General Collection layout                                                     |
|                                                                       | Self-check station                                                            |
|                                                                       | Teen Space                                                                    |
|                                                                       | Program and Study Rooms                                                       |

|                             |                                                  |
|-----------------------------|--------------------------------------------------|
|                             | 2 <sup>nd</sup> floor restrooms & water fountain |
|                             | Staff Workroom & Offices                         |
| <b>1<sup>st</sup> Floor</b> |                                                  |
|                             | Meeting Room                                     |
|                             | Restrooms & water fountain                       |
|                             | Parking Lot (Public/staff)                       |
|                             | Café Area                                        |
|                             | Material Returns                                 |
|                             | Friends Sale Shelves & Donation Bin              |
|                             | Guest Services Desk & Workroom                   |
|                             | Elevator                                         |
|                             | Self-Checkout Stations                           |
|                             | Holds Pickup Shelf                               |
|                             | Children's Area                                  |
|                             | General Collection locations                     |
|                             | Family Restrooms                                 |
|                             | Public Printer/scanner                           |
|                             | Study & Program Rooms                            |
|                             | Parent/Teacher Resource Room                     |
|                             | Staff Workroom                                   |
|                             | Maintenance Office                               |
|                             | Staff Mailboxes                                  |
|                             | Library-wide Forms                               |
|                             | Back elevator                                    |
|                             | Delivery entrance                                |

### **Within 1<sup>st</sup> Week of Hire**

| <b>ADP – Administrative Services Manager</b> |                                                                                                                                    | <b>(please allow 1 hour)</b> |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
|                                              | Introduce Time Card/Payroll System                                                                                                 |                              |
|                                              | Time & Attendance – reporting procedures                                                                                           |                              |
|                                              | Payroll Deductions                                                                                                                 |                              |
|                                              | Time Off Requests & Balances                                                                                                       |                              |
|                                              | Overtime/Rounding                                                                                                                  |                              |
|                                              | Expectations to use ADP to clock in/out consistently and accurately, request time off, and to view time cards and pay information. |                              |

| <b>Library Director</b> |                                                                                |
|-------------------------|--------------------------------------------------------------------------------|
|                         | Discuss the Library's purpose, values, core services, and strategic priorities |
|                         |                                                                                |

|  |                                              |
|--|----------------------------------------------|
|  | Describe the Library's philosophy of service |
|--|----------------------------------------------|

| <b>Employee Handbook Review – Human Resources (please allow 45 minutes)</b> |                                                                                                                          |
|-----------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
|                                                                             | Hiring Practices                                                                                                         |
|                                                                             | Compensation                                                                                                             |
|                                                                             | Benefits and Tuition Reimbursement                                                                                       |
|                                                                             | Staff Responsibilities                                                                                                   |
|                                                                             | Acknowledging Receipt of Employee Handbook form; explain expectation to have working knowledge of ALL personnel policies |

| <b>Specific Training – Network Administrator (please allow 45 minutes)</b> |                                                                                                                                                                                                                                                                                        |
|----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                            | Office 365 <ul style="list-style-type: none"> <li>• Basic access and overview of available tools</li> <li>• Email basics (login, send/receive/delete, utilize address book)</li> <li>• Email management (utilize folders, encrypted messages, attachments)</li> <li>• Teams</li> </ul> |
|                                                                            | Telephone Training <ul style="list-style-type: none"> <li>• How to make a call</li> <li>• Transfer</li> <li>• access directory</li> <li>• set up voice mail</li> <li>• check voice mail</li> </ul>                                                                                     |
|                                                                            | Intranet <ul style="list-style-type: none"> <li>• Accessing</li> <li>• How to navigate and search policies</li> <li>• How to locate staff contact information</li> <li>• Where to find staff training resources</li> </ul>                                                             |

| <b>Supervisor</b> |                                                                                                                                                                                 |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | Request Access to SWAN Support Site via the form <a href="https://swanlibraries.net/onboarding">https://swanlibraries.net/onboarding</a> . Staff must have an L2 account first. |
|                   | Show employee where supplies are located and describe departmental procedures regarding procurement of additional supplies.                                                     |
|                   | Show the employee the location of files, etc. Explain how they are set up.                                                                                                      |
|                   |                                                                                                                                                                                 |

|  |                                                                                                                                                                                                                                                                                          |
|--|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Review Culture Statement – discuss each section and give examples of how we treat patrons and coworkers.                                                                                                                                                                                 |
|  | Guide employee on setting up L2 account                                                                                                                                                                                                                                                  |
|  | <p>Explain different aspects of security in the library.</p> <ul style="list-style-type: none"> <li>• Opening/Closing procedures</li> <li>• Confidentiality</li> <li>• Security Cameras</li> <li>• PICs – explain when to call PIC for patron, operational, or safety reasons</li> </ul> |

## **Week 2 after hire**

| <b>Benefits – Human Resources</b> |                                                                |
|-----------------------------------|----------------------------------------------------------------|
|                                   | LifeWorks – discuss and send invitation email                  |
|                                   | Mission Square – discuss the benefits and how to enroll        |
|                                   | Niche Academy – discuss and send invitation email              |
|                                   | (FT Employees) – IMRF – explain Voluntary Annual Contributions |

| <b>Supervisor</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | <p>Clarify communication methods within the department and the building.</p> <ul style="list-style-type: none"> <li>• Email</li> <li>• Intranet <ul style="list-style-type: none"> <li>○ Shout-outs vs. News posts</li> </ul> </li> <li>• Teams</li> <li>• Telephone/Paging System <ul style="list-style-type: none"> <li>○ Review procedures for warm transfer, telephone etiquette</li> </ul> </li> <li>• Bulletin Boards</li> <li>• Employee Handbook and other Policy Manuals</li> <li>• Procedure Manuals</li> <li>• Mailboxes</li> <li>• Newsletter</li> <li>• Staff Meetings</li> <li>• What to do if employee has a problem</li> </ul> |

## **Within 30 Days of Hire**

| <b>Supervisor – Performance Factors</b> |                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                         | <p>Review Patron Experience Guidelines</p> <p>Explain Performance Review process – provide copy of annual evaluation tool and explain resources available on intranet</p>                                                                                                                                                                                                                        |
|                                         | <p>Review Continuing ed requirement.</p> <ul style="list-style-type: none"> <li>• Purposefully seeks continuing education opportunities relevant to position in the library; demonstrates self-initiative by staying informed about internal library news and changes.</li> <li>• Shares knowledge with supervisor and coworkers to best determine how to apply new skills and ideas.</li> </ul> |
|                                         | Explain discipline process                                                                                                                                                                                                                                                                                                                                                                       |
|                                         | <p>Review Employee Handbook policies on computer use:</p> <ul style="list-style-type: none"> <li>• Use of Electronic &amp; Communication Systems</li> <li>• Information Security</li> <li>• Social Media Use</li> </ul>                                                                                                                                                                          |
|                                         | <p>Discuss Employee reimbursement policies, expenses, &amp; required procedures.</p> <ul style="list-style-type: none"> <li>• Mileage reimbursement</li> <li>• Travel reimbursement</li> <li>• Staff Development activities</li> <li>• Professional memberships</li> <li>• Other library-related expenses</li> </ul>                                                                             |
|                                         | <p>Safety</p> <ul style="list-style-type: none"> <li>• Point out location(s) of Guide to Emergency Procedures</li> <li>• Schedule appointment with Assistant Director to complete the Safety Orientation &amp; Tour</li> </ul>                                                                                                                                                                   |
|                                         | Review staff committees, the purpose of each and opportunities to serve (Funshine, EDISJ, etc.).                                                                                                                                                                                                                                                                                                 |
|                                         | Introduce ticketing system for IT & Maintenance requests.                                                                                                                                                                                                                                                                                                                                        |
|                                         | Introduce patron behavior policy and expectations of staff for enforcement                                                                                                                                                                                                                                                                                                                       |

| <b>Guest Services – Head of Guest Services</b> (please allow 30 minutes) |                                |
|--------------------------------------------------------------------------|--------------------------------|
|                                                                          | Library card                   |
|                                                                          | Demonstrate self-checkout      |
|                                                                          | Return of items/AMH & drive-up |
|                                                                          |                                |

|  |                                |
|--|--------------------------------|
|  | Online access/employee account |
|  | Holds                          |

### **Within 60 Days of Hire**

| <b>Supervisor</b>       |      |
|-------------------------|------|
| Introduce EDISJ Toolkit |      |
| Initial                 | Date |

**Please allow 30 minutes for each meeting**

| <b>Sam's Lab Makerspace – Maker Services Manager</b> |      |
|------------------------------------------------------|------|
| Provide overview of space & services available       |      |
| Initial                                              | Date |

| <b>IT Services – Head of IT</b>         |      |
|-----------------------------------------|------|
| Mission and key functions of department |      |
| Initial                                 | Date |

| <b>Materials Management – Head of Materials Management</b> |      |
|------------------------------------------------------------|------|
| Mission and key functions of department                    |      |
| Initial                                                    | Date |

| <b>Materials Management – Collection Development Manager</b> |      |
|--------------------------------------------------------------|------|
| Mission and key functions of team                            |      |
| Initial                                                      | Date |

| <b>Community Engagement – Head of Community Engagement</b> |      |
|------------------------------------------------------------|------|
| Mission and key functions of department                    |      |
| Initial                                                    | Date |

| <b>Adult Services – Head of Adult Services</b> |  |
|------------------------------------------------|--|
|                                                |  |

|                                         |      |
|-----------------------------------------|------|
| Mission and key functions of department |      |
| Initial                                 | Date |

|                                                     |      |
|-----------------------------------------------------|------|
| <b>Youth Services – Head of Children’s Services</b> |      |
| Mission and key functions of department             |      |
| Initial                                             | Date |

|                                              |      |
|----------------------------------------------|------|
| <b>Teen Services – Head of Teen Services</b> |      |
| Mission and key functions of department      |      |
| Initial                                      | Date |

|                                                                    |      |
|--------------------------------------------------------------------|------|
| <b>Administration/Maintenance Services – Facilities Supervisor</b> |      |
| Mission and key functions of department                            |      |
| Initial                                                            | Date |

## 90 days of Hire

|                                                          |      |
|----------------------------------------------------------|------|
| <b>Supervisor</b>                                        |      |
| 90-day performance review – (Use annual evaluation tool) |      |
| Initial                                                  | Date |
| Set goals                                                |      |
| Initial                                                  | Date |

I, \_\_\_\_\_, have completed the full orientation program

on \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Supervisor/Manager: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**~Please return original to Human Resources~**

Date returned to HR: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Initials: \_\_\_\_\_



# Blue Binder Bingo



|                                     |                                                                       |                                                    |                                      |                                          |                                             |
|-------------------------------------|-----------------------------------------------------------------------|----------------------------------------------------|--------------------------------------|------------------------------------------|---------------------------------------------|
| Place a Hold                        | Check In a Cancelled Hold                                             | Add a Circ Note for Light Moisture or Small Stains | Send an Item to Repair               | Modify a Hold Date                       | Replace a Broken Case                       |
| Erase Pencil Marks on an Item       | Process Transit Bin                                                   | Replace Self Check Receipt Paper                   | Check Out a Video Game               | Replace a Library Card                   | Make a CHICAGO_PL/ Reciprocal Borrower Card |
| Give a Damaged Glenside Item to Pam | Make a Library Card for a GSD Resident                                | Empty Book Drop                                    | Accept a Donation                    | Sell a Book of Stamps                    | Help Someone in Masquerade Mode             |
| Use Workflows in Offline Mode       | Process an Adventure Pack or STEAM Kit with Missing or Damaged Pieces | Stamp Newspapers                                   | Process FoL Purchase                 | Check Out an Item with Unavailable Holds | Mark an Item as Lost and Bill User          |
| Make a Non-Resident Fee Card        | Check Out an ILL                                                      | Apply Repair Tape to an Item                       | Prepare an Unusable Item for Transit | Check Out a Missing Hold to MISSHLDShLF  | Check Out a Bike Lock                       |
| Discard an Item                     | Make a NONSWAN/ Reciprocal Borrower Card                              | Reinstate a User with MAILRETD Status              | Renew an ILL                         | Place an Item on the SNAG SHELF          | Place a Copy-Level Hold for Repair          |

# Welcome to the Team!

Please fill out this form so we can get to know you a little better.

Hello, my name is: \_\_\_\_\_.

I celebrate my birthdate on: \_\_\_\_\_.

My favorite candy is: \_\_\_\_\_.

My favorite snack is: \_\_\_\_\_.

On the weekends, I like to: \_\_\_\_\_.

My favorite hot beverage is: \_\_\_\_\_.

My favorite cold beverage is: \_\_\_\_\_.

The best restaurant is: \_\_\_\_\_.

I couldn't live a day without: \_\_\_\_\_.

My pets' names are: \_\_\_\_\_.

When I "grow up" I want to: \_\_\_\_\_.

My hidden talent is: \_\_\_\_\_.

This store has a lot of my money: \_\_\_\_\_.

My favorite color is: \_\_\_\_\_.

My favorite book is: \_\_\_\_\_.

My favorite TV show is: \_\_\_\_\_.

My favorite holiday is: \_\_\_\_\_.

# Circulation Services Clerk

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Applicant name:

Date:

Can you tell us a little bit about yourself?

What do you know about the Glenside Library, and what made you decide to apply for this position?

What does great customer service mean to you?

Have you ever dealt with an unreasonable or angry customer? How did you handle it, and what was the outcome?

Describe a time you turned a negative situation with a customer into a positive one.

Describe a time when you had to work with a colleague you didn't get along with. What did you do to improve the situation?

Describe a time when you were on a team and one of the team members wasn't pulling their weight. What did you do about it?

What do you do to stay focused and contribute to the team during slower periods or when there's downtime at work?

Tell us about the last time you had to learn a new task. How did you go about learning it?

Think of a time when someone gave you feedback that was difficult to hear. How did you respond?

What motivates you to put forth your best effort?

Please give us 3 to 5 words that best describe you.

- |    |    |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. |    |

Talk about position, including the schedule. Are you still interested?

If we were to offer you the position, when could you start?

Any questions?



**Welcome, \_\_\_\_\_!**

We are thrilled to have you on board! This checklist serves as your training checklist.

### **CHECK IN DESK / DUTIES / PROCEDURES**

#### **Check In Desk**

- ☐ Library Logins: PC & WorkFlows
- ☐ Use Correct Wizard
- ☐ Beware of open screens in the background (RFID)
- ☐ Check for damage before checking in; if damaged, **do not check in**
- ☐ **Repairable** Damage check out to "REPAIRGSD", complete pink slip, initial & date
- ☐ Faded Spine Labels → Ian's bin in the supply closet
- ☐ Items with multiple parts/pieces [if anything is missing, **do not check in**]
  - ☐ Count discs in multi-disc sets
  - ☐ Check for CDs or DVDs in kits
  - ☐ Puzzle Pieces
- ☐ STEAM Kits and Adventure Packs [Check in, but email Pam & Sarah if missing items]
- ☐ Check in one item at a time [watch screen]
- ☐ Messages that pop up [# of discs, send to repair, holds, etc]
- ☐ No RFID or RFID error
- ☐ Checking in Items with Holds
  - ☐ Holds for pickup here (hold wrapper)
  - ☐ Holds for pickup elsewhere (transit)
  - ☐ Transit Label Generator
- ☐ Items returned that are not in system [Google Drive - Items Not In System doc]
  - ☐ GSD Items
  - ☐ Non-ILL Library Items
  - ☐ School District Items - record on spreadsheet & give to YS
- ☐ Personal item(s) returned
- ☐ Closing a full transit bin [after checking for transit labels, close up and place pink flag in pocket]
- ☐ Shelf Reading & Paging

#### **Routing Checked In Items**

- ☐ Review of types of library materials
- ☐ Sorting items onto High Priority Carts [Adult / Juv]
  - ☐ Foreign language
  - ☐ New items
  - ☐ Video Games
  - ☐ Award Books
  - ☐ Magazines
  - ☐ Special Items
- ☐ Sorting items onto Shelves in Workroom
- ☐ Items that go to Department Desks [Kits, Binge Boxes, Launchpads]
- ☐ Double Check-in Procedure [Colored Flags]

### Incoming Transit Items (weekday afternoons)

- ☐ Incoming RAILS bin items [watch for notes on transit labels, check for damage]
  - ☐ Sort Non-GSD / GSD items onto different carts
  - ☐ Do not remove routing label until condition is checked
  - ☐ How to route UNUSABLE items (to Pam)
  - ☐ Damaged items [when to send back, when to fill out the yellow slip]

### OnShelf Items Report

- ☐ Printing (single-sided is usually best)
- ☐ Matching barcodes, could be different catalog records or copy-level holds vs. title-level holds
- ☐ Popular Items and New Adult Fiction → Look up picture in Aspen
- ☐ Items not found → Have another person check, if not found, check out to MISSINGGSD
- ☐ Initial and date the sheet, then place in the paper tray under the timesheet binder

### Search Lists

- ☐ Sent to the Circ email account <[gpnotice@glensidepld.org](mailto:gpnotice@glensidepld.org)>
- ☐ What to check, where to check
- ☐ Initial and date the sheet, then place in the paper tray under the timesheet binder

### Phones

- ☐ Greeting [Hello, Glenside Library, how may I help you?]
- ☐ Transferring / Hold
  - ☐ AS / 402: adult callers, study rooms, computer questions, looking for adult book
  - ☐ YS / 404: adult looking for their kid, museum/zoo passes, looking for kids books
  - ☐ Phone List with other extensions
  - ☐ Mai Thi
  - ☐ Scott
- ☐ Parking Calls so another phone can pickup
- ☐ For privacy and safety reasons, we **cannot** give out any information about specific staff schedules.
- ☐ Calls from other libraries for a status check on GSD patrons
- ☐ Calls from other libraries requesting a shelf check

### Questions/phone calls regarding Civic Services should be directed to Leads who have completed training

- ☐ Notary Public (hours, who does it, what to do with calls)
- ☐ Passports (hours, who does it, what to do with calls)
- ☐ License Plate Stickers (hours, who does it, what to do with calls)
- ☐ Voter Registration [register on computer = easiest way]

### Holds

- ☐ Looking up a patron's holds
- ☐ Difference between copy-level and title-level holds
- ☐ Active vs. Inactive Holds
- ☐ Holds automatically expire from a user's account if it is not filled within 1 year
- ☐ Modifying a hold
- ☐ Pickup Library
- ☐ Pickup By date and how to handle requests for extensions

## **CHECK OUT DESK / DUTIES / PROCEDURES**

### **General Service Desk Information**

- ☐ Library Calendar
- ☐ Department Email
- ☐ Work done at the desk should be work-related or on the computer (no reading magazines, books)
- ☐ Greet patrons and make eye contact when they enter the building
- ☐ Keep conversations work appropriate and at a low volume
- ☐ No food or drinks at the check out desk
- ☐ No cell phone use at the check out desk
- ☐ Ringing the doorbell for help/backup
- ☐ Do not answer phone calls when helping a customer
- ☐ Don't leave the desk unattended; if you leave, check back often to see if you are needed.
- ☐ Any problems or customer suggestions or concerns? (in no particular order)
  - ☐ Suggestion box
  - ☐ Get Pam, Anees, Lead
  - ☐ Get PIC
  - ☐ Give business card

### **Cash Register**

- ☐ How to log on using your clerk number
- ☐ Different bill reasons
- ☐ Register is used only for cash or check payments, credit card payments are in WorkFlows
- ☐ How to open the register (No Sale)
- ☐ Money marker for bills larger than \$20
- ☐ Keep bills face up, facing in the same direction
- ☐ Watch for foreign currency (usually coins)
- ☐ What to do if you need to change/smaller bills
- ☐ Stamps
- ☐ Flash Drive: \$2.75 YES, PUT IN THE REGISTER. Ring up as "Miscellaneous."

### **Other Sales**

- ☐ Friends sales (books, movies, bags, earbuds): Don't ring up. Put money in the correct pouch.
- ☐ FOL Videogame sales

### **Library Card Registration**

- ☐ Proof of address and proof of ID required [DL with Glendale Hts address works for both]
- ☐ Thoroughly search for existing record in WF [name, birthdate, address, phone number]
- ☐ Copy User wizard [Caution: must search for duplicate records first!]
- ☐ Essential Elements of Registration
  - ☐ User Profile
  - ☐ Library Code
  - ☐ First, Last Name
  - ☐ Address (ALL CAPS, NO Punct.)
  - ☐ Phone
  - ☐ Notice Preference
  - ☐ Care Of Field (Minors)
  - ☐ Include County
- ☐ Nonresident Cards and exceptions to NS fee (under 18, veterans)

## Limits and Restrictions by Item Types and User Profiles

- ☐ Limits on Item Types
  - ☐ Video Games (5 max)
  - ☐ New Movies (5 max)
  - ☐ Launchpad Tablets (3 max)
  - ☐ Binge Box (1 max)
- ☐ Limits for NONSWAN\_RB patrons
  - ☐ 1 yr privilege [must renew annually]
  - ☐ 5 overdue items
  - ☐ \$5.00 bills
  - ☐ 50 checkouts
  - ☐ 8 holds [with restrictions on games/new AV]
- ☐ Limits for CHICAGO\_P patrons
  - ☐ 1 yr privilege [must renew annually]
  - ☐ 5 overdue items
  - ☐ \$10.00 bills
  - ☐ 50 checkouts
  - ☐ 8 holds [with restrictions on games/new AV]

## Loan Limits and Restrictions by User Profile

- ☐ Renewals
  - ☐ Manually [by user, by item]
  - ☐ Automatically [2 days before due date]
  - ☐ Failed renewals [due to holds or blocks from fines/overdues]
- ☐ Notifications
  - ☐ Email
  - ☐ Text (SMS)
  - ☐ Problems receiving notices
  - ☐ MessageBee Reports
- ☐ ILL Check Outs / Check Ins
  - ☐ Special Due Date
  - ☐ Paperwork
  - ☐ Renewals [1 wk. extension, ILL clerk requests renewal with owning library]
- ☐ BLUECloud Circulation
- ☐ OFFLINE MODE in WorkFlows
- ☐ Blue Binder with Circ Procedures
- ☐ Special Items: Bike Locks, Nintendo Switch, Youth Services basket ball/volleyball/football

## Patron Account Blocks and Notes

- ☐ Different Types of Blocks
  - ☐ DELINQUENT [can place holds, can check out]
  - ☐ MAILRETD [can place holds, cannot check out until address is updated]
  - ☐ BADADDRESS [can place holds, cannot check out until address is updated]
  - ☐ BLOCKED [cannot place holds, cannot check out until items are returned and/or fines paid]
  - ☐ BARRED [cannot place holds, cannot check out until issue is resolved and account is reinstated]
  - ☐ COLLECTION [cannot place holds, cannot check out until all items are returned and/or fees paid]
- ☐ Notes in records must include initials, date, and library code [GSD/DATE/INITIALS: Note]

**Opening Procedures (for Clerks)**

- ☐ Canceled Holds
- ☐ Straighten front desks & Replenish Supplies
- ☐ Check Program Calendar for events that day
- ☐ Check Email
- ☐ Book Drop
- ☐ Processing Expired Holds and what to do with those that could not be found
- ☐ Newspapers [stamp and put out, keep 1 week's worth, make sure they are in chronological order]

**Closing Procedures**

- ☐ Pull Expiring Holds
- ☐ Check end carts for materials
- ☐ Restart computers and Tidy Workspaces/Snack Counter

**Miscellaneous**

- ☐ Teacher Cards [School Book Bag Agreements]
- ☐ Donations: no encyclopedias, magazines, cassettes, VHS [optional receipt in drawer]

Signature of Circulation Services Manager at completion of training:

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Last updated 1/2026



# GLENSIDE LIBRARY Onboarding Checklist

**Employee Name:** \_\_\_\_\_

**Start Date:** \_\_\_\_\_

## Pre-Hire

- ☐ Welcome Email to Staff
- ☐ Welcome Email to New Employee
- ☐ Create Work Email & Add to Mailing Lists - HR
- ☐ Key Fob/Card - HR
- ☐ Locker Assignment - HR
- ☐ Register ID
- ☐ Timesheets & Name on Tab
- ☐ Shelf Reading Assignment & Name on Tab
- ☐ Storage Basket Name & Sign
- ☐ Welcome Sign for Cabinet
- ☐ "Getting to Know You" Sheet
- ☐ Update Existing Schedules
- ☐ Update Schedule Templates
- ☐ Update Weekend Rotation Schedule

## Employee Paperwork - HR

- ☐ Signed Offer Letter
- ☐ Resume/Application
- ☐ Payroll & Direct Deposit
- ☐ Tax forms
- ☐ Emergency Contact Info
- ☐ Library Policies
- ☐ Apparel /Nametag Sheet

## First Day

- ☐ Sign up for L2
- ☐ Sign up for SWAN Online Learning
- ☐ Sign up for SWANcom
- ☐ Sign up for Library Newsletter
- ☐ Add phone number to Circ list, copy and distribute [or group text]
- ☐ Requesting time off / shift swaps
- ☐ Set up employee library card
- ☐ Building tour and introductions
- ☐ Share Circulation Procedures/Masters
- ☐ Update Glenside Utilities Page - email Jim

### **Circulation Department Tour**

- ☐ Timesheet & Shelf Reading Binders
- ☐ Key cabinet
- ☐ Storage Closet [Supplies kept here]
- ☐ Snag Shelf [Incomplete & Damaged Items]
- ☐ Lost & Found
- ☐ Mail Bin
- ☐ Donations

### **Safety & First Aid**

- ☐ First Aid [upstairs/downstairs]
- ☐ Emergency exits
- ☐ AED Machine
- ☐ Narcan
- ☐ Closest Fire Extinguisher
- ☐ Person In Charge
- ☐ Incident/Accident Reports

### **Important Resources on Google & Chrome**

- ☐ Schedules - Weekly & Weekend
- ☐ Staff Forms and Policies
- ☐ Circulation Procedures & Masters
- ☐ Glenside Utilities [swaps, time off, shout outs]
- ☐ Department Email
- ☐ Different Bookmarks on Chrome

### **Circulation Department Employee Basics**

- ☐ Breaks & Meals
- ☐ Pay 15<sup>th</sup> and last day of month [1st one will be delayed]
- ☐ Centrally HR [Sick Time and Pay Stubs]
- ☐ Time off Request & Shift Swaps

### **Key Policies**

- ☐ Freedom to Read
- ☐ FOIA
- ☐ Internet
- ☐ Objections
- ☐ Use of Facilities
- ☐ Access & Collection Development
- ☐ Unattended Children

### **SWAN Online Learning & Webinars**

- ☐ Register for an account
- ☐ Browse course catalog
- ☐ Enroll in courses [Circulation Basics, Patron Mgmt, Patron Blocks & Notes, Lost Cards]