***Bettendorf Public Library New Employee Orientation and Training Checklist***

Manager/Supervisor will review the following factors with new employees, as applicable to assigned duties. Forms will be completed within 30 days of hire.

Manager/Supervisor will forward completed/signed forms to Library Director for review. Forms will be retained within the assigned division office for the duration of employment.

\*Should staff change positions or divisions within the library, assigned manager/supervisor will review orientation factors with the staff member, as applicable to the employee’s changing position and duties. Forms will be submitted to Library Director upon completion for review and re-filed within new division, as applicable.

***Prior to first day (Manager or Supervisor)***

Set up employee email account and password with IT.

Submit request for Polaris account to RiverShare ILS Admin committee representative for user name and password. If no representative is available, submit help desk ticket for Polaris user name and password. Password is to be supplied by employee.

Set up staff mail box and kitchen shelf.

Enter employee in *When to Work* scheduling software

Assign appropriate permissions for Outlook calendars

Set up access to RiverShare web site and RiverShare mail lists

\_\_\_\_\_Set-up City New Employee Orientation for first day. HR Administrative Assistant will provide *New Employee HR Packet*. \*New Division Heads or Library Director (only) should meet with City Administrator on first day. Schedule meeting with City Administrator’s Administrative Assistant.

***Additional requirements for New Manager prior to first day***

Add manager to email list for extension 5701 messages

Add manager to sorter email list

Give manager permissions for appropriate Outlook calendars

Add manager to *When to Work* scheduling software

***Preliminary Tasks (Within First Week)***

Meet Director and Admin Asst. on first day

\_\_\_\_\_ Introduce to division staff and Union Steward

Review copy of job description, division responsibilities and schedule. Review appropriate attendance and suitable use of shift trades

General guidelines for evaluation and review and job termination

Explain payroll processes, including how to fill out time sheets

\_\_\_\_\_ Review overtime procedure (if applicable) and how assignments are generated.

\_\_\_\_\_Obtain and record name and phone number of emergency contact person(s); deadlines for reporting; pay check delivery.

\_\_\_\_\_Initiate staff ID badge (HR for Division/Dept Heads; Admin Asst. for support staff)

Tour facility; review employee parking, assign locker and/or kitchen shelf, as appropriate

Locate restrooms, first-aid supplies

*City of Bettendorf Employee Handbook and Policy Manual*, including *Gift Law* and *Ethics*. Assign completion of Acknowledgement Form.

Review Intranet

Review N-Drive

Review Library’s *Mission Statement* and *City Values* statements on N-Drive

Review Division and Library Organizational flowchart.

Review Library policies and location on N-drive. Emphasize importance of policy and procedure compliance relating to security, privacy and handling of confidential information. (Check off as reviewed, p. 6)

Review Library-wide procedures and location on N-Drive (check off as reviewed, p. 6-7 of this document).

\_\_\_\_\_Review location of Library Union Contract on N-drive. Assign completion of *Acknowledgment Form.*

Review internal/inter-City communications procedure, including phone greetings, inter-city mail, personal phone calls, appropriate email content, cell phones, etc.

Review guidelines on visitors, general personnel conduct, including appropriate front-line conduct for staff

Train Polaris procedures, as applicable (passwords, barcodes, override)

Library Website, including location of *Calendar of Events,* library policies, and online digital resources

***Additional Training to be completed during probation for all employees***

Board Meeting Schedule, structure, monthly reports, etc

(Division/Dept. Heads)

\_\_\_\_\_ Review library budget and invoicing responsibilities, as applicable

\_\_\_\_\_ Managers Folder (N-drive): Personnel, Hiring, Discipline, Evaluation Procedures; Monthly Statistics; Organizational Chart; Staff Foundation Grant Applications; AS400 Instructions. (Director/Division Heads)

\_\_\_\_\_ Register for Iowa Library Services and ILA distribution lists, ALA/ILA membership, etc. as applicable to position.

\_\_\_\_\_ Company Nurse

\_\_\_\_\_ Prohibition for cashing personal checks or debit card advances for staff via Library cash drawers

\_\_\_\_\_ Prohibition regarding personal purchases via library vendors

Car, key location, driver’s license on file, calendar for reserving, as appropriate

Copiers for public use: operation, supplies, maintenance

Copiers for staff use: operation, supplies, maintenance, personal use

Donations and memorials: to Friends, to Gift Fund, to Foundation: tax receipt

Media requests. See Director

Customer comment cards

Pages newsletter

RiverShare: introduction to consortium, access to rivershare.org web site

Smoking regulations

Weapons regulations for staff and public

City: relation to

Friends of the Bettendorf Public Library

Bettendorf Public Library Foundation

Staff meetings and In-services

Continuing education

State Library of Iowa

Staff and kitchen dues

Staff lounge responsibilities

***Emergencies***

*Emergency Response and Facility Closure Policy*

\_\_\_\_\_ Evacuation Plan

Armed Intruder Response Overview (Active Shooter Situation)

\_\_\_\_\_ Location of alarms

Contacting police/fire

Police radio

Weather radio

AED device (location)

Location and use of hazmat kits for trained staff

***Library Facility***

Location of Library collections and training in shelving library materials

Location of supplies

Location of keys for meeting rooms, display cases, etc.

Location of offices

Location of first aid kits

How to lock front doors

How to set security system

Security gate

Bulletin board for the public

Bulletin boards for staff information

\_\_\_\_\_Security Walk-through Procedure and logs

\_\_\_\_\_Roles of In-house Maintenance Staff

***Outlook***

Sending email

Replying and Forwarding emails

Using CC or BCC to send to multiple recipients

Attaching files to an email

Remotely accessing email

Deleting email

Viewing calendars/schedules

***Library Policies & Procedures***

*Policies*

Circulation of Materials (Including Confidentiality, Fees and Fines, Interlibrary Loan, Non-resident and Open Access, Overdue Materials, Patron Registration)

Collection Development (Including Confidentiality and Statement of Concern)

Community Engagement and Marketing

\_\_\_\_\_ Computer and Electronic Access

Confidentiality

\_\_\_\_\_ Creation Studio Equipment

Emergency Response and Facility Closure

Gift and Donor

Meeting Room and Study Area

Program Development

Public Posting and Display

\_\_\_\_\_ Reference and Information Services, incl. Examination Proctoring Guidelines, as applicable

Rules of Conduct

Service Hours

Sex Offender

\_\_\_\_\_ Statement of Concern

Volunteer

*Library-wide Procedures*

\_\_\_\_ Emergency Closure (Loss of Hours)

\_\_\_\_ Employee Evaluation Procedure

\_\_\_\_ Facility Access Guidelines

\_\_\_\_ Facility Maintenance and Mechanical Malfunction Procedure

\_\_\_\_ Holiday Closure Guidelines

\_\_\_\_ Incident Report Procedure

\_\_\_\_ Program, Purchase, and Funding Request

\_\_\_\_ Public Request for Information

\_\_\_\_ Staff Certification Requirements

\_\_\_\_ Short-term Absence Reporting Procedure

\_\_\_\_ Whom to Call List

\_\_\_\_ Workplace Attire Procedure

***Division Procedures***

Review Opening/Closing duties, per division(s).

***\_\_\_\_\_*** Review of division procedures (check off when completed)

***Telephone and Library Paging/Public Announcement System***

Placing, answering and transferring a call

Turning voice mail on and off

Parking and un-parking a call

Retrieving voice mail

PA system: how to use, appropriate use of

**Additional training to be completed during probation, dependent on position and division duties**

***Polaris***

Checking items in and out (Staff Client)

\_\_\_\_ Checking items in and out (LEAP)

\_\_\_\_ Modifying Due Date (Staff Client)

\_\_\_\_ Modifying Due Date (LEAP)

\_\_\_\_ Checkout without a card

Delinquent, blocked and barred patrons

\_\_\_\_ Paying fines and bills (Staff Client)

\_\_\_\_ Paying fines and bills (LEAP)

Using Lost and Paid form

Claims returned process

Renewing items (Staff Client)

\_\_\_\_ Renewing Items (LEAP)

Searching for items

Placing holds

Removing holds

Trapping holds

Suspending holds

Mark items missing and used

Check item status

Find Number of Circs and Last Activity Date of an Item

Look Up Last User

Registering a library patron (Staff Client)

Registering a library patron (LEAP)

Modifying a patron card (Staff Client)

Modifying a patron card (LEAP)

Receiving items in transit

Changing location of items for displays

\_\_\_\_ Opting in for online newsletter

***Circulation***

Using and maintaining cash register and credit card machine

How to add/query an RFID tag

Self-check terminals

Overdue process

Van delivery

Problem shelf

Lost and Found Procedure

Donation receipts, processing credit card donation

Scooters and carts

Interlibrary loan and system holds

Shelf reading

Branch Manager function

Loan periods

Loan limits

Reciprocal borrowing

Checkout without a card

Clearing address checks

***OPAC (Online Public Access Catalog)***

Searching for items, including limiting searches

Placing holds

Viewing accounts

Renewing materials

Changing pins

Opting in for Reading History

Making Lists

Saving Searches

Paying fees and fines online

***Sorting System***

Inducting items

Resetting error messages

Backdating returned materials

Processing transit /exception bin

***Incident Tracking***

Location of and filling out incident reports; identifying appropriate situations requiring incident reports

Accessing the Patron Incident Tracking database

Entering information in the Patron Incident Tracking database

Location and procedures for security cameras

***Calendar of Events***

Looking up scheduled events or meetings

Registering patrons for events

Scheduling events or meetings for staff or public

***PCRes/LPT1/eCommerce***

Make computer reservations

View patron details

Extend time

Providing Computer Access to Guests

Turn validation off and on

Print multiple jobs

Access previously printed jobs

Pay for prints using free print account, cash or AAM

Remote printing

Pay for fines/fees on web page, at print release station and at OPAC stations using AAM account or credit card

***Information and Adult Services***

Information Desk Manual

Searching Polaris staff side

Searching OPAC

Knowledge of print collection

Knowledge of online databases

Reference interview

Tech Teen

Programming (Incl. Creation Studio)

Material request forms

Interlibrary loan

Notary services

Output measures

Overnight checkout of reference materials

Collection development procedures, including policy on defending challenged materials

***Outreach/Volunteers***

Homebound services

Iowa Department for the Blind

Large type books

Off-site collections

Senior citizen days

Use of volunteers

Volunteer forms/policy

***Reader’s Advisory***

Reader’s advisory reference interview

Knowledge of reader’s advisory sources, such as Novelist Plus

***Online Resources***

Ancestry Plus

AtoZ Databases

Baker and Taylor

Biography Reference Bank

Books and Authors

Business Insights: Essentials

Business Source Premier

Chilton Library

EBSCOhost

Freegal

Funk and Wagnalls new World Encyclopedia

Health and Wellness Resource Center

HeritageQuest Online

Hobbies and Crafts Reference Center

Home Improvement Reference Center

Learning Express Library

Morningstar

Novelist Plus

OneClick Digital

Opposing Viewpoints

Overdrive

Proquest

Quad Cities Newspaper Index

Regional Business News

Small Engine Repair Reference Center

Transparent Language

TumbleBooks

Tutor.com

Upper Mississippi Valley Digital Archive

ValueLine

World Book Encyclopedia

Zinio

***Technology***

Microsoft Word

Microsoft Excel

Microsoft Publisher

Microsoft PowerPoint

Public scanner

Public fax

Finding and using templates in Office products

Accessing wi-fi

Uploading from flash drive or digital camera

Creating email accounts via free email providers

Website

Using projection systems in meeting rooms

3D printing

\_\_\_\_ Social Media

***Proctoring Exams***

Entering received exams into database

Proper procedure of proctoring and returning exams

***Information-Technical Services***

Order, claim, receive and approve payments of print and audiovisual materials

Prepare materials for check out

Catalog library materials

Periodical and newspaper processing and maintenance

Print and audiovisual materials processing

Mending and repair of library materials

Supervision of maintenance pages

Removal and withdrawal of print and AV materials

Database maintenance

Replacement of missing or damaged items

***Youth Services***

Use the Reading Program Database

Series and Sequels Webpages

Connie's Corner (Learning Software) Computers Troubleshooting

AccuCut Die Cut Machine and Dies

Programming (Incl. Creation Studio)

Collection development procedures, including policy on defending challenged materials

Care of fish in fish tank

\_\_\_\_ Page Training Manual, as applicable to position

**I have reviewed and understand the information I have received:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor/Manager

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Library Director

Reviewed:

September, 2014 (SM/ML)

July, 2015 (SM)

August, 2016 (SM and Mangers)

November, 2016 (SM- Update)

May 26, 2017 (SM/CM)