***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)