

Circulation Volunteer Training

Follow the Procedural Manual Instructions and you will not have a problem!

Purpose: The Circulation Policy is intended to facilitate the easy access to books by WV residents while protecting the collection from loss.

Policy:

- Books may be checked out by residents and staff of Willamette View.
- Books are loaned for 30 days with no renewal.
- Borrowers whose books are overdue will be notified through inter-office mail.
- Books are not to be passed along to another resident.
- Caretakers who deliver books to residents should sign out the book to the resident. The resident remains responsible for the book.
- Residents and staff may request a book using the Hold Request form available in all libraries. Books will be delivered to the library location requested on the form.

Process:

- Residents sign check out card with date, name, and apartment number.
- Staff members sign check out card with date, full name, and department name.
- Check out cards are left in the checkout box on each library desk.
- Circulation volunteers check out the books into Resource Mate.
- When returned, circulation volunteers check in the books into Resource Mate.

Sort Items in the Return Bin:

1. Book has a card pocket:

- Check the owning library.
 - The card pocket label will have the library name and should be color coded (use highlighter if not):

Court	Pink
Manor	Green/Blue
Terrace	Orange/Yellow
 - **If not correct location, DO NOT process**--place on the courier shelf for transport to the owning library.
- If a Reserved For slip with a name on it has been left in the card pocket--discard it. The patron simply forgot to remove it before returning the reserved book (the name should match the last entry on the checkout card).
- If correct library, items are ready for Check In.

2. Book (paperback) has a spine label but no card pocket: Place on the Plaza courier shelf for transport.(See **503 Shelving Books**).

3. Book has no WVL identifiers: Books that have no Willamette View Library labels are probably donations and should be placed on the designated workroom “donations” shelf for processing.
4. DVDs: Shelf alphabetically by title in the DVD section of the Court Library.

Gather Cards in Check Out Box:

1. Yellow Reserve slips: Leave them in the patron card box for a Reserve Manager.
2. Check Library. **If not correct location, DO NOT process:**
 - * Place the card in one of the clear plastic zip bags provided.
 - * Place on the courier shelf for transport to the owning library.
3. Alphabetize by author if there are a large number of cards.

Prepare Books for Check In:

1. In the library office, find the Check Out Card file box.
2. Locate the Check Out card for each returned book.
 - If the book still has the card in the pocket it was probably never checked out. To support circulation statistics check the book out and back in again:
 - Write today’s date in the Date Checked Out and Checked In columns of the card.
 - Write *Unknown* under the Name.
 - Temporarily set the book aside and put the card with the others to be checked out.
 - Once check out is complete, continue with check in.
 - Match the barcode on the card to the barcode on the book card pocket.
 - Write today’s date in the Date Returned column.
 - If there is a paperclip (indicating that an overdue notice was sent), remove it.
 - If there is a Reserve Hold attached, proceed to check in first, then process as instructed on the hold slip.
 - Place card in card pocket.

Log On to Resource Mate: See procedure **701 Computer Log On and Log Off**

Check Out Books in Resource Mate:



1. From the Resource Mate (RM) **Home** screen (large pie chart) click the **Patron Activities** icon on the top toolbar.
2. Change the **Patron** to the correct library:
 - At the far right of the patron box, click the dropdown menu (▼).
 - Click on the line for the appropriate library.
3. Verify that **Check Out Date** shows today's date, if not, use the dropdown calendar to reset.
4. The **Barcode Entry:** box should be highlighted in red, if not, click on the box.
5. Scan the barcode for each check out card.
6. Verify that all Items have the same **Expected Back** date (30 days from check out date).
If an Item has the wrong date:
 - Pull the check out card for the incorrect Item(s).
 - Highlight the Item line.
 - Select **Remove Item** (lower right hand corner).
 - Repeat check out (Step 3).
7. Click **Check Out these Items**.

Check In Books in Resource Mate:

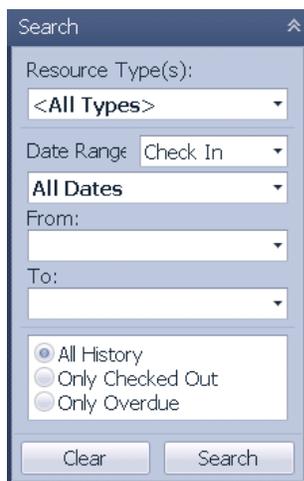


1. Click the **Check In** icon on the top toolbar.
2. Verify that **Check In Date** shows today's date, if not, use the dropdown calendar to reset.
3. The **Barcode Entry:** box should be highlighted in red, if not, click on the box.
4. Scan the barcodes on the back of each book.
5. Verify that all Items have the same **Check In** date (today's date). If an Item has the wrong date:
 - Pull the incorrect Item(s).
 - Highlight the Item line.
 - Select **Remove Item** (lower right hand corner).
 - Repeat check in (Step 2).
6. Click **Check In these Items**.
7. Finish processing any Reserve Hold items as instructed on the hold slip.

Validate Check Out and Check In:



1. Click the **Circulation** icon on the top toolbar.
2. In the **Location** column (far right), use the dropdown menu (▼) to change to the correct library.
3. In the left **Search Panel** set the search filters:



Date Range: **Check Out**

From: Today's date (use dropdown calendar)

To: Today's date (use dropdown calendar)

Radio Button: All History

4. Click **Search**.
5. Check the cards just checked out against the list which appears. The RM list may be alphabetized by clicking on either the Author or Title header.
6. If a title does not appear repeat check out process.
7. Go back to the **Search Panel** and change:
Date Range: **Check In**
8. Click **Search**.
9. Check the books just checked in against the list which appears. The RM list may be alphabetized by clicking on either the Author or Title header.
10. If a title does not appear repeat check in process.
11. Click **Clear** to reset the **Search Panel**.
12. Return the **Location** (Step 2) to **All**.

Log Off Resource Mate: See procedure **701 Computer Log On and Log Off**