

Service Level Change

Service Level A

Service Level B

Building Closed	Building Open Only to Staff
Online resources	Online resources
Telephone support reference	Telephone support reference
Online programming	Online programming
No circulation – Book drop with back date	Curbside pickup transactions & book drop returns

The distinction in this service level change may seem small, but it includes restarting transactional services to patrons which affects many areas of Sierra and many areas of messaging.

Timeline of Tasks: If your service change is scheduled, use the timeline below. If it is an emergency situation. Choose the items from the list that include the **[!]** in the order that they display on the list.

Planning: You must know

- **Dates Closed in Sierra**– What range of dates will your library be closed to the public and not processing circulation transactions.
- How will you manage curbside
 - How will patrons schedule pickup
 - Holds vs. checkouts
 - Process for pickup
 - Return process
- Manage your messaging: What do you need to share and where. You can point all messaging to your website to streamline changes
 - Notices
 - Website
 - Signage

ASAP – As soon as you are aware of the pending change of service begin this task list.

1. Transition date **[!]** – complete the [online form](#) to inform staff at MHLS that a service change is pending. It will trigger tickets for MHLS to complete edits in the following areas.
 - a. Closed dates in Sierra: The table will be updated to reflect your service level during the range of dates you have provided in the form. **Any Change of plans needs to be reported ASAP.**
 - b. Your **pickup location**
2. **Delivery changes [!]** - Contact Tom Finnigan at Ext. 244 or by email at tfinnigan@midhudson.org at least 3 days prior to restarting your delivery. Temporary changes require 3 days notice,

permanent changes (such as a move to a new building) require 2 weeks for contract changes with our delivery vendor.

One week Prior to Reopening– As soon as you are aware of the pending change of service

1. **Plan to update your messaging to be ready to Open**
 - a. **Notices** – If you updated your notices for closure you will now edit to provide Curbside instructions
 - b. **Website**
 - i. **Curbside pickup policies and instruction**
 - ii. **Curbside hours.**
2. **Holdshelf review:** If you closed your doors abruptly, chances are you have items that have been on your holdshelf and depending on your length of closure it may be that some of the holds have been cancelled or are no longer needed. It may also be true that there are some patrons who would still pick up the items. In order to give them a chance to retrieve the item take the following steps before you reopen.
 - a. From the patron record you can see if the hold is still in place Reach out and let patrons know you will be reopened on (Insert date) and you will check items out to them if they are still interested in picking them up. That does mean the clock is ticking.

Day of Reopening – The date that you resume staff presence in the building and start processing circulation transactions.

1. **Clear your holdshelf** – yes you must. Any items that have not been checked out to patrons, must be cleared. This not only removes items that are expired, but updates holds that have been cancelled or are no longer needed.
2. **Fill Holds-** You must run the **Title and Item paging lists**. Now that you are officially open in the days closed table, your site is a potential paging location to fill holds for other libraries. The paging of each library is in place for 48 hours, so filling your holds quickly, or marking your items lost if not found, keeps the requests moving quickly.
3. **Send your Overdue notices and Bills.** If you have done the work leading up to your closure in time no items should have been due while you were closed. Once you resume open dates, your notices also need to resume the regular schedule of being sent to provide patrons with a consistent cadence and message. (see the process of moving to service level A, from any other service level).

Follow through – What should you do once you are back in place for a week or more

1. Review View Outstanding hold report in Sierra. Are there holds for your location that have available copies and not yet filled? If so, the hold paging process may be restarted. From the patron record, cancel the hold and then replace the hold at the original queue.