Students on Both Sides of the Desk:

Effective Student Training of Exceptional Service

at a Combined Services Desk

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Abstract

This paper explores circulation and reference training for student workers at the combined services desk at the Willis Library on the campus of the University of North Texas (UNT). In June 2012, Willis Library at UNT combined its first floor reference and circulation desks, creating the Library Services Desk (LSD). The LSD circulation services are performed by full-time staff and undergraduate student workers. The LSD reference services are performed by a librarian, a reference specialist, or a graduate library assistant (GLA). The circulation workers are cross-trained in minimal reference services. The reference workers are cross-trained in minimal circulation services. The primary benefit of the merger has been the centralization of services for patrons. Challenges include effectively cross-training the entire LSD staff to provide circulation and reference services that appear seamless to patrons while maintaining a distinct division of labor behind the desk.

Keywords: access services, circulation training, combined service desk, cross training, graduate library assistants, reference, reference training, student library assistants
Recent History of Willis Library Reference Desk

Some reference desks in large public universities have undergone changes in the last five or more years. Service models have been altered or expanded, but physical locations also have shifted from more remote sections of libraries closer to the entrance for more visibility and accessibility. Some libraries have combined multiple service desks with the goal of providing fewer service points, simplifying users’ experiences. This evolutionary scenario occurred to the reference desk in Willis Library at the University of North Texas (UNT).

Before merging the reference and circulation service desks in June 2012, the general reference desk in Willis Library was located on the first floor and faced the entrance/exit doors just inside the lobby area. Actually, there were two reference desks in one reference desk area. One faced the entrance and the other faced the reference collection, creating an L-shaped configuration. This set-up seemed ideal when the reference desk was double staffed. One worker could greet and make eye contact with patrons coming in and out of the library. The other worker could overlook the general reference collection, group study tables, PC work areas, and printers and scanners areas. When the reference desk area was single staffed, the lone worker sat at the desk that faced the entrance.

The reference desks were staffed by librarians, a reference assistant, or graduate library assistants (GLA). Ideally, the reference desks were staffed with two workers: a librarian and a GLA. GLAs are graduate students in the Library and Information Sciences program at UNT. The goal of having GLAs work with librarians at the reference desk was to provide on-the-job training. GLAs staffed one of the desks while the librarian staffed the other. GLAs observed librarians with patrons if the GLAs were not assisting patrons themselves. Conversely, librarians observed GLAs helping patrons and advised, constructively interjected as needed, and provided
feedback about collections, resources, reference interviews, approachability, and reference services in general.

This arrangement and model of service worked well for a few reasons. The desk area’s proximity to the library’s entrance was helpful to patrons. When they entered the building, they were facing the reference desks, making the area highly visible and accessible. The desk area was also close to the general reference collection, making it easily accessible to reference staff. The desk area was also a crossroads of foot traffic. Patrons passed by the reference desk area on the way to PC work stations, scanners, printers, the coffee shop, a staircase, and general study areas.

However, this arrangement and model of service did not work well for a few reasons. If familiarity leads to invisibility, then the desk area’s location was so visible that patrons began to ignore it. The desk area blended in too well with the surroundings, almost camouflaging it. Also, the reference desk area was within feet of two other desk areas, confusing patrons about which desk they should ask their specific questions, which, other than reference help, might include circulation, interlibrary loan, reserves, technical, or computer help.

Recent History of the Willis Library Circulation Desk

Circulation desks in academic libraries have also undergone a transformation in the past few years, most notably the services offered at the desk and the number of locations where those services take place. Previously, the common circulation ideology was “more is better” when it came to the number of service desks that provided circulation services. There also existed the perception by patrons that circulation covered everything library service related, especially when other service desks in the building closed earlier. Through a series of events that led to the
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creation of a combined services desk in Willis Library at UNT, the Circulation Department was able to enhance its focus on creating more user-centered services in a more centralized location compared to the multiple service desk model it followed in the past.

Prior to June 2012, the Circulation Department in Willis Library was responsible for staffing four service points: an information/quick checkout desk, a reserve desk, a fines desk, and a main circulation desk. These service points were spread out on the first floor of Willis Library. The main circulation desk also offered checkout services, patron services such as library cards and basic catalog assistance. A shared component to the main circulation desk was the interlibrary loan service desk. All of the service desks mentioned, except for the main circulation desk, were mostly staffed by student assistants. The main circulation desk was always staffed with a full time circulation person who was also responsible for opening and closing not only the department but also the building.

There were several issues the multiple locations for circulation services presented. The multiple locations were confusing for patrons. Although these service points were all located on the first floor, it was not always clear what services each desk offered. Since these desks were located in different areas on the first floor, circulation staff found it difficult to refer patrons to these other desks, including the reference desk, because it appeared we were sending patrons away to get further assistance. Missed opportunities to provide patrons with outstanding service occurred when patrons became frustrated in being referred to another service desk for assistance such as reference and often left the area with a negative view of the library and its services. Staff at the main circulation desk often received reference and interlibrary loan questions when their desks were closed but were not always able to answer them.
Missed opportunities to provide outstanding service also occurred due to staffing issues related to running multiple service desks. When coverage issues occurred due to illness or high turnover, student assistants covering other circulation desks would need to be reallocated to the other desks to help, leaving other areas shorthanded. Besides coverage issues there were also high staffing costs involved with staffing multiple service desks.

Although all of these issues affected service to patrons in some way, the most important customer service issue the multiple service desk model presented was reduced training opportunities between staff. On-the-job training for new student assistants was difficult in the evenings when only one full-time circulation worker was available, and working at another service point. With the multiple service desk model, questions between staff were often asked and answered via the telephone. The combined services desk model provided an opportunity to improve circulation and reference training through cross training and collaboration.

**The Combined Services Desk**

In the Fall of 2011, the Circulation and Interlibrary Loan departments were merged together to form the Access Services Department. Cross training took place for the Circulation and Interlibrary loan staff to learn about the other area’s policies, procedures and programs. Circulation staff members were trained to answer interlibrary loan questions, and interlibrary loan staff members were trained to answer circulation questions. The creation of the Access Services Department provided an opportunity to examine combining even more service areas since the main circulation desk and interlibrary loan desk were now successfully merged. Previously, the two areas shared the same service desk because of limited space, but it was not a merged service point. Eventually the circulation desk would be the single service point for all
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circulation services on the first floor of Willis Library reducing the number of circulation service points from four to one.

In the summer of 2012, another opportunity for combining service desks arose. Circulation staff and reference staff worked closely together because the very nature of their services was public service oriented. They often referred patrons to each other’s desks. A proposal was made to combine the circulation and reference desks, creating a single service point for patrons on the first floor of Willis Library creating the Library Services Desk. Managers of librarians, staff and student assistants from both Access Services and Reference met to discuss an implementation plan. A large component of the implementation plan for the combined service desk was training. Training would be key to a successful combined service desk. Circulation staff would be trained to answer basic reference questions through a series of training sessions. Reference staff would be trained to answer basic circulation questions.

Another large component of the implementation plan was staffing of the Library Services Desk. Graduate library assistants (GLA) and undergraduate student assistants would primarily staff the desk with training support from full-time Access Services staff, a reference librarian and reference staff member. There was space at the desk for four staff members: three Access Services student assistants and one Reference GLA. This staffing model would free up many of the reference librarians and full-time access service staff to focus on new services supporting student and faculty research as well as increased opportunities for library instruction. Managers were close by and readily available to answer any questions the service desk staff might have.

The managers in both areas wanted to get feedback from their staff regarding their concerns moving forward with the implementation of the combined service desk. Some of those
concerns included the quality of service offered at the desk, coverage issues and patron privacy related to the reference interview. These concerns would be focused on during training.

The training component of the implementation was heavily focused on cross training. Through a series of training sessions and Blackboard modules, staff from both areas discovered they already knew much about the other area’s policies and procedures, which relieved some of the anxiety felt on both sides. Managers from both Access Services and Reference noticed how cross training encouraged staff from both areas to work together to solve problems and answer questions. They learned more about each other’s areas just by listening to how they responded to patrons’ questions. The staff and managers from both areas discovered how the combined services desk provided even better research support to students, faculty and staff because they no longer had to go to several desks to receive circulation and reference services. In working together, Access Services and Reference staff increased their skill sets through training and sharing of ideas.

The combined service desk has many benefits. The single service point improves service for patrons, increases communication between departments, provides better on-the-job training opportunities, increases cost savings and improves staff morale. All of these factors contribute to a positive library experience for the patron.

Training Student Assistants for Reference Work

The reference trainer at UNT has multiple instruction methods for teaching student assistants: on-the-job training, a reference training manual, and reference training classes. With these multiple training options, the student assistants at the combined services desk learn how to answer basic reference questions and know where to guide the patron for further information.
While at the reference desk, the reference trainer provides student assistants with on-the-job training. The trainer demonstrates navigation techniques to frequently asked questions as a reference transaction takes place. For example, patrons at the UNT Willis library frequently need to find book reviews. The trainer will demonstrate to both the student assistant and the patron on the process of searching by “Title” and “Review” in a variety of sources: the online catalog, JSTOR, Kirkus Review, New York Times Book Review, and the book publisher’s home page. It is important that the trainer stay on task, focusing only on the question being asked. Deviating from the specific search causes confusion.

**Reference training manual for Access Services student assistants**

The reference training manual for Access Services student assistants (Appendix A) is a collaborative effort written by a reference librarian, a reference specialist, and a student assistant. The training manual is designed to teach basic reference skills to undergraduate student assistants. The manual is updated each semester as changes occur in policies and procedures.

**Searching Academic Search Complete.** The first skill detailed in the training manual is how to navigate the Academic Search Complete database. The most frequently asked reference question at the combined services desk is, “How do I find three articles on my research topic?” The Academic Search Complete database is the most useful resource for undergraduates searching for articles on a specific topic. Academic Search Complete is a full-text database that covers the majority of academic subjects. The Reference Training Manual provides a sample search for the Gettysburg Address that is illustrated with step-by-step screen shots.

**Keyword vs. subject searching.** Methods of searching using the terms “keyword” and “subject” are clearly defined in the training manual. Keyword searching is a good way to begin the research process using significant words or phrases. Keyword searches are broad and will
return the title, source, and contents of each article in a database. This can lead to the retrieval of too many, too few, or completely irrelevant resources. Subject searching is a more specific type of searching because it only returns results from one field in the record of an article—the subject field. Subject searching returns results that are highly relevant to the research topic (Oregon Tech Libraries, 2013).

**LibGuides for subjects and class pages.** The training manual demonstrates how to locate LibGuides on the library homepage. LibGuides help patrons navigate through library materials on specific subjects or specific classes. LibGuides are designed by subject librarians and faculty as the one-stop shop for academic resources such as tips on database searching, citation assistance, bibliographic management tools, and subject specific items.

The training for LibGuides is followed with a personal reference transaction with each student assistant. When training student assistants, the reference trainer demonstrates how to search for LibGuides that are relevant to the student’s major. By making the LibGuide experience meaningful to the student assistant, a connection is created that reminds them to share subject specific LibGuide information with patrons.

**Liaison Librarians.** The training manual lists the UNT liaison librarians, their subject specialties, and contact information. At the Library Services Desk, student assistants are encouraged to help patrons to the best of their abilities. If further assistance is needed, the student assistant provides the patron with contact information for the liaison librarian. The manual also details how to set an appointment with a liaison librarian (Campbell, McCabe, and Whitmer, 2013).
Training Graduate Library Assistants for the reference desk

The UNT Libraries’ Graduate Library Assistant (GLA) training course is comprehensive. From basic reference to difficult citations, the GLAs are given detailed instructions on how to perform at a high level at the reference desk.

The GLA Blackboard training course

The GLA Blackboard training course starts with a detailed organization chart of the UNT Libraries. This organization chart details each department head’s responsibilities. The chart is a navigation tool that educates the GLA for questions about job descriptions and location of library staff. Knowing the specifics about job descriptions helps the GLA refer a patron when resources at the reference desk are exhausted.

The reference tip sheet on search strategies assists new reference desk staff on how to differentiate between Keyword v. Boolean searching. The tip sheet also defines truncation, wildcard, and proximity operators. This information is helpful with patrons at the desk and patrons on the phone. There is also a section on how to help distance patrons gain access to electronic resources by using the Virtual Private Network, vpn.unt.edu.

Ethical situations are also explained in the GLA training course. The Reference and User Services Association (RUSA) guidelines explain how to respond to questions about medical, financial, and legal requests: the reference staff can bring the patron to the information but the patron must make their own conclusions. Further, the policy on how to respond to requests for patron records is clear: senior staff members are responsible for this activity (Reference and User Services Association, 2013).
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Learning Modules

An all-inclusive list of academic subjects, databases, and online reference materials are covered in the learning modules portion of the training course. Each learning module includes descriptions and activities designed to help the GLA find relevant databases and online resources to answer questions from all academic disciplines.

Working through the learning modules, GLAs find search techniques for answers to difficult patron questions. For example, the modules detail how to navigate Journal Citation Reports for impact factors, how to find dissertations and theses by academic department, and how to locate images on the ArtStor database. An impact factor is a measure of the number of times an average article from a particular scholarly journal has been cited in an individual year. Impact factors are relevant to instructors who are seeking tenure and need to demonstrate the value of their research. How to search for dissertations and theses is a frequently asked question at the desk and the GLA training course details how to search for these items via ProQuest dissertations and theses. Visuals are increasingly used in illustrating research. GLA’s develop the skills needed to help patrons navigate and download images from the ArtStor database.

The Government Information learning module of the GLA training course provides helpful resources for patrons in need of statistical information. Faculty, students, and staff at UNT frequently require demographic, economic, and health related statistics (Leuzinger, 2013).

Ten-point guide for GLAs at the reference desk

The ten-point guide for GLAs at the reference desk (Appendix B) is a training tool for the new GLA’s first reference shift. The ten-point guide lists information-rich URLs that need to be
bookmarked, InterLibrary Loan and Reference Statistics, as well as directions for setting up printers, and who to contact for fines and reserves.

The GLAs perform minimal circulation activities to make sure they are available for reference. Minimal circulation activities include checking in and checking out materials, retrieving reserve items, and assisting patrons with placing items on hold. The Access Services staff process fines and help instructors process reserve items. The ten-point guide is updated each semester as policies and procedures change.

**Future Developments**

One of the concerns from librarians before the circulation and reference desks were combined was adequate and professional service given by student workers. Training is essential for an efficient and effective combined services desk, and continual training of student workers is crucial because of their limited skills set, lack of experience, and relatively high turnover rate.

GLAs primarily are hired and trained for reference services, so initial training for reference services at the new combined desk was minimal. Training for access services was relatively more challenging because it was new information for them. However, UNT Libraries is fortunate that UNT has the Library and Information Sciences program from which GLAs are hired. GLAs tend to have a better understanding of library services in general and access and reference services in particular, and they are typically eager to learn as many library services and skills as possible to make them more marketable and employable after they graduate.

Undergraduate student workers staffed the circulation desk before the creation of the combined services desk, so initial training for them was minimal for access services at the new combined desk. The more challenging training for them was basic reference services. However,
they tend to be eager to learn about basic database searches, basic catalog searches, and knowing when to refer patrons to the reference section of the combined services desk.

Training is ongoing and necessary. One challenge is finding time to train student workers. However, time must be made for training. It is more difficult to provide one-to-one training for reference services as occurred when librarians and GLAs shared the reference desk area. The GLAs have weekly meetings for training. Also, the reference specialist or reference coordinator makes time for initial on-the-desk training of new GLAs and for occasional on-the-desk training as needed or as time allows. Possible future training methods might include Blackboard modules and video tutorials.

Assessment of services is also essential when managing a combined services desk. It is important to evaluate services and training for efficiency, but more importantly, to provide great service to patrons. Feedback from student workers and staff is important, too. They work face-to-face with the patrons and know the procedures well. Input from student workers about what works and does not work is essential to provide exceptional service.

For example, when the service desks were first combined, reference services implemented an on-call paging system for back up if the GLAs needed extra reference help or were stumped with a more in-depth reference transaction. The nine librarians in the Research and Informational Services Department were scheduled for two to four hour shifts for on-call. Scheduling proved to be difficult and motivation was low for librarians to be on-call. Statistics showed GLAs paged on-call librarians about once per week because either the GLAs were able to answer the reference questions efficiently and effectively or they were able to encourage patrons to contact and schedule a librarian for a future reference-by-appointment. Because the
on-call system was rarely used and was a source of frustration to some librarians, the on-call system was abandoned.

Overall, combining service desks has been a positive experience for staff and patrons. Service quality has not diminished and patrons seem satisfied. However, this is through planning, continual training, and constant assessment of services. UNT Libraries Public Services Division strives to hire only quality staff, including student workers. The Public Services Division emphasizes an overarching philosophy of service to patrons. When students are hired, an attitude of hard work and service is sought. Also, a commitment to ongoing training is expected for the trainers and student workers. Finally, assessment is ongoing in order to evaluate and provide excellent service to patrons.
References


The purpose of this reference manual is to assist Access Services student assistants provide basic reference at the Library Services Desk. The topics include how to search the Academic Search Complete Database, Keyword vs. Subject searching in the online catalog, how to navigate LibGuides, and how to find a subject librarian.
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2. Keyword vs. Subject Searching ................................................................. 6
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   - How to find a liaison librarian  
   - How to set an appointment with a liaison librarian
Searching Academic Search Complete

Academic Search Complete is a scholarly collection of journals covering a wide range of topics. It is an excellent starting point for assisting patrons with their information needs.

1. To search Academic Search Complete:
   a. Begin from the library homepage at http://www.library.unt.edu
   b. Select the Databases tab from the media search box
   c. Enter “Academic Search Complete” in the Search box
   d. Click the Search tab.
   e. Select the “Connect to Academic search complete” tab.
2. From the Basic Search page of Academic Search Complete:
   a. Enter your search term(s) in the Search box.
   b. “Limit your results” to “Full Text” and “Scholarly (Peer Reviewed) Journals”
   c. If the patron is only interested in articles within a certain time frame, enter the appropriate date range in the “Published Date” boxes.

3. Review the search results with the patron:
4. Select an article record:

   a. The article can be retrieved in .html or .pdf formats.
   b. The article can be e-mailed to the patron by using the E-mail tool.

   c. The Cite tool provides citation formatting of the article for the reference list.

      i. Click on Cite

      ii. Choose the Citation Format required for the course.

      iii. The citation can be cut and pasted into the reference list of the paper or exported to bibliographic management software such as RefWorks.
Keyword vs. Subject Searching

When searching for information on a topic in the library catalog or most databases, the two most widely used methods are **keyword** and **subject** searching. Both methods offer advantages and disadvantages, and knowing how to use them can help retrieve better, more accurate search results.

**Keyword Searching:**

Keyword searching is a good way to begin the research process. Keyword searches are broad, as the search will cover the title, source and contents of each article in a database. This can lead to the retrieval of too many, too few, or completely irrelevant resources.

**Subject Searching:**

Subject searching is a more specific type of searching as it only looks at one field in the record of an article—the subject field. The subject heading terms come from an established list of subject terms and are assigned to an item in order to describe its contents. Most academic library catalogs use Library of Congress Subject Headings. Searches using the subject heading predetermined for a given subject can yield results that are more relevant to the research topic.

**To access search options:**

a. From the library homepage, select Books & Media from the media search box.

b. Keyword searching is selected as the default search option.

c. To choose Subject searching or other search options, use the pull-down menu.

d. Type the search terms into the Search for Books, Journals, Films, Music & More box and click Search.
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Searching Tip:

Use both keyword and subject searching when doing research.

1. Begin with a **keyword** search using your own words to describe the topic.
2. Review the search results.
3. Select the results most relevant to the research topic.
4. Note the subject headings listed in the records of the relevant sources.
5. Conduct another search using the **subject** terms from the previous search.

For example, a keyword search for American Indians retrieved the following article:

A review of the Subject Terms in each of the retrieved records used “Indians of North America” instead of “American Indians”. For further research, use “Indians of North America” as subject search terms.

**In summary:**

<table>
<thead>
<tr>
<th><strong>Keyword Searching</strong></th>
<th><strong>Subject Heading Searching</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Uses words or phrases of researcher’s</td>
<td>Uses specific, predefined terms</td>
</tr>
<tr>
<td>choice</td>
<td></td>
</tr>
<tr>
<td>More flexible – searches in several</td>
<td>Less flexible – searches in only one field</td>
</tr>
<tr>
<td>fields</td>
<td></td>
</tr>
<tr>
<td>Results may include irrelevant items,</td>
<td>Results include very relevant items, more focused search</td>
</tr>
<tr>
<td>less focused search</td>
<td></td>
</tr>
<tr>
<td>May yield too many or too few results</td>
<td>In case of too many results, use sub-headings to focus on one aspect of the broader subject</td>
</tr>
<tr>
<td>Keywords are appropriate for use across</td>
<td>Subject headings may differ from database to database</td>
</tr>
<tr>
<td>databases; not database-specific</td>
<td></td>
</tr>
</tbody>
</table>
**How to Find Keywords**  
Think of any words that describe your topic; use alternate words and synonyms to describe the same idea  
Start with just a few terms; the more terms you add, the more you narrow your possible results

**How to Find Subject Headings**  
Catalogs and databases usually provide lists of the subject headings preferred for searching, sometimes called a “thesaurus”  
Ask Reference Librarian for help with finding subject headings

<table>
<thead>
<tr>
<th>When to Use Keywords</th>
<th>When to Use Subject Headings</th>
</tr>
</thead>
<tbody>
<tr>
<td>You don’t know the full title or author’s name of a particular work, you just know what the work is about</td>
<td>You want to find all documents provided by a database or a catalog on your specific topic</td>
</tr>
<tr>
<td>You are not sure where to start, or what subject heading(s) to use</td>
<td>You need to find out all the sources of information in your area of study</td>
</tr>
</tbody>
</table>

*Comparative table courtesy of Oregon Tech Libraries  
http://www.oit.edu/libraries/help/library-guides/keyword-vs--subject-searching

**How to Find LibGuides for a Subject or Class**

LibGuides are customized online resources compiled by UNT librarians and faculty to guide students through library materials on specific subjects or for specific classes. UNT’s LibGuides are accessible from the library homepage.

**Subject Guides:**  
Subject guides are more general and provide information on an area of study.

**Class Pages:**  
Class pages are designed to meet the information needs of a specific course.

To access a Subject Guide or Class Page:

a. Go to the library homepage at http://www.library.unt.edu/
b. Choose the Subject Guides tab from the media search box.
c. Type in the desired Subject Guide in the Search box or choose from the “Please make a selection” pull-down menu.
d. The webpage for the subject guides and class pages can also be accessed by clicking the “Go to Subject Guides & Class Pages” link or “Class Pages” link in the Quick Links box.
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e. Use the pull-down menu to locate the desired Subject Guide or Class page.

Liaison Librarians

Library liaisons work in partnership with one or more academic departments, schools or colleges to enhance the Libraries’ collections and increase faculty and student access to library resources in all formats through reference, teaching and technology.

How to Find a Liaison Librarian:

a. Go to the Library homepage at http://www.library.unt.edu
b. Choose the “Services” link from the toolbar

c. Scroll down to the Contact Us section of the Services page
d. Select the Library Liaisons List link
• A list of the Library Liaisons and their subject areas can be found at http://www.library.unt.edu/liaisons. It is recommended that this link be bookmarked for easy access.
• A list of the liaisons is also included as a separate divider in this manual.
• Business cards for library liaisons are provided in a business card file box at the reference desk to be distributed to students as needed.

How to Set an Appointment with a Liaison Librarian:

Most liaison librarians use e-mail as their contact method of choice.

Students, faculty and staff may request an appointment by completing the Reference by Appointment form at http://www.library.unt.edu/forms/reference-appointment

To access this form:

a. Use the Schedule a Reference Appointment link located at the bottom of the Library Liaisons List webpage at the URL given above.
b. Complete the Reference by Appointment form and submit.
### Reference Desk Training Checklist

**Appendix B: Ten-point guide for Graduate Library Assistants at the reference desk**

**Reference Desk Training Checklist**  
January 2014  
Susan Whitmer

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
</table>
| **1. Look approachable** | • Scan the area, smile, greet patrons. No food or drink at the library services desk.  
• Greet your coworkers, learn the names of Access Services staff and student assistants. |
| **2. Log on to Sierra:** | • Log on to Sierra to check out/check in materials.  
• **Username:** circ  
• **Password:** 4lvis2011 |
| **3. Set up receipt printer in Sierra** |  
1. File  
2. Select printer>receipt printer  
3. Local printer>OK  
4. General tab>Receipt  
5. Appearance>Monochrome  
6. Format: select Text narrow, Print form feed, Send auto cut>OK |
• Bookmark Illiad.  
• **Login:** circ  
• **PW:** ill |
| **5. RefStats:**[https://intranet.library.unt.edu/referecstats/index.php](https://intranet.library.unt.edu/referecstats/index.php) | • Log patron interactions in RefStats: directions, reference, technical questions, phone, email, etc.  
• Read RefStats, good search strategies can be found here.  
• Bookmark RefStats. |
| **6. Fines** | Fines are the responsibility of full-time Access Services staff, some part-time student assistants as well. *Reference doesn’t process fines.* |
| **7. Phone:** Answer phone: “Willis Reference, this is (your name), may I help you?” | • If a call needs to be transferred and the individual is not at their desk, give the patron the contact phone number.  
• How to transfer a call:  
  - Press HomeFlash button  
  - dial four-digit extension  
  - Hang up phone |
| **8. Gen Ref** | Procedures for Email Reference located at J:\RIS Ref Assistant Resources & Training\Email-reference_procedures_Jan20110[1].docx |
| **9. Reserves** | • Information slip for student to find reserve #.  
• Location of reserves. |
| **10. Virtual Private Network (VPN), vpn.unt.edu** | Off-campus patrons frequently have trouble accessing our databases; walk them through the vpn process: Enter vpn.unt.edu in browser>enter EUID and pw>enter library.unt.edu |
Appendix C: Access Services training checklist for student assistants

**Student Assistant Training Checklist**

I. **The Basics**

- __ Clocking in/clocking out-WebClock
- __ Work Schedule, covering shifts
- __ Dress Code
- __ Breaks
- __ Getting shifts covered
- __ Work computer usage
- __ Studying
- __ Headphones and Cellphones
- __ Checking work email-outlook
- __ Blackboard Learn Course

**Give Tour**

II. **Information about the Library**

- __ Structure of the library system
- __ Library website information
- __ Location of library catalog
- __ Supervisors
- __ Contact Information

III. **Library Policies**
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__ Circulation Policies, laptop policies
__ Noise Policy, floor structure, (cell phones)
__ Food and Drink Policy
__ Privacy Policy

IV. Checking out materials:

__ ID cards accepted-not transferable, what if someone doesn’t have an ID, how does a non-student get a library card
__ One time checkout per semester without UNT ID
__ Patron types
__ Checkout time periods
__ Checkout limits
__ Reminding patrons of due dates and fine rates
__ Special statuses (non-circ, new book shelf/display)
__ Using the receipt printer
__ ILL books, what is an ILL book, what does it look like
__ Hold items
__ Fine rates-location of Fines Desk, hours of operation
__ Music checks in and out their own items
__ Location of book drops, stress the Highland Street book drop

V. Checking in materials

__ Procedures for checking materials in
__ Sierra locations
__ Process books one book at a time
STUDENTS ON BOTH SIDES OF THE DESK

__ Stress importance of watching the screen as items are scanned
__ Items on hold
__ Special statuses (lib use only, lost/paid...)
__ Fines
__ Damaged items
__ Music checks in their own items
__ Where checked in items go
__ What to do with non-UNT library items
__ Where special collection items need to be returned

VI. Renewing materials

__ Renewal policy - can renew online via our website or in person. No phone renewals, must have books with them to renew in person, limits on renewals

__ Special collection items, esp. reserve items cannot be renewed

VII. Understanding Call Numbers

__ Library of Congress
__ Dewey (only in remote storage-should be familiar with what they look like)
__ Shelving in call number order
__ Blue taped remote storage items
__ What do the stickers mean-stickers always override the call number regarding location

VIII. Working at the Service Desk

__ Customer service, service desk etiquette
__ Answering phones, transferring calls
__ Answering questions, Ref Stats
__ Book drops
__ Opening and closing procedures
__ Processing returned books
__ Searching
__ Shredding
__ Office duties
__ Office supplies-scissors
__ Help Me button (on desktop of public computers)
__ Self-checkout machine
__ Referring patrons to another desk
__ Check handout/brochure supplies

IX. **Reserves** (note that there are other reserves collections at the other libraries)
__ Looking up a reserve item in the catalog
__ Reserve call numbers
__ Checking out a reserve item, different checkout time periods
__ Checking in a reserve item
__ Shelving a reserve item
__ Fine rate for reserve items
__ What to do when an incorrect fine is assessed
__ Special items on reserve: business items
__ What to do if a professor has a reserve request
__ What to do if a professor wants to take an item off reserve

X. **Reference**
__ The reference interview
__ Searching the catalog
__ E-Books
__ Electronic databases
__ Library Liaisons
__ Frequently asked reference questions

XI. **Other Services:**

__ Online Holds Service-what is it, why would someone use it
__ Faculty Delivery Service
__ What and where is Remote Storage?
__ Placing holds and recalls
__ What are graduate carrels?
__ Lost and Found
__ Interlibrary Loan
__ Fines and blocks
__ Instruction rooms at ECL
__ Distance Learning
__ Donations
__ Friends of the Library
__ Courtesy Cards
__ TexShare Cards
__ Wireless Network
__ Expired Library Registration
__ ADA compliance (special equipment- now in the Image Depot.)
__ Printing procedures and policies