What to expect when you're expecting ... to reopen

As Evergreen libraries begin to reopen to the public, Equinox wants to provide information and ideas on a set of challenges and opportunities to consider, along with some suggestions and best practices that we believe will be helpful to both staff and patrons.

Things to review

- Adjust the maintenance messages in `config.tt2` to reflect the latest information relevant to patron needs.
- Check for any adjusted hours of operations. If you're looking forward to using the forthcoming curbside delivery functionality in Evergreen, recall that the hours of operation are used to determine the appointment windows that patrons can select.
- Check the "Charge fines on overdue circulations when closed" library setting and consider if it should be adjusted. Note that changing this setting can have an effect on existing circulations that potentially became overdue during any closure. Also look at any fine voiding settings for lost and long-overdue items, as you may want more manual adjustment in case items aged to one of these states.
- Look at library settings that control hold targeting while closed, including both "Target copies for a hold even if copy's circ lib is closed" and "Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib". Remember that it may take longer than usual for the system to process all the backlogged requests.
- Check any permissions that may have been adjusted to prevent holds.
- Take a look at any hard boundaries used to temporarily restrict hold-based transits.

New Curbside Pickup feature

Equinox has written a new feature in Evergreen to help manage curbside pickup operations. This feature allows library staff and patrons to schedule appointments for patrons to pick up their available holds. It also adds a new staff interface for managing the staging and delivery of items that have been scheduled to be picked up.

This feature is currently slated to be deployed to Sequoia on the evening of June 30th and to Canadian hosting customers on request beginning on the 30th. Equinox can also assist self-hosted customers with installing the feature starting on July 1st. If you are a self-hosted Equinox customer interested in using the curbside pickup feature, please contact Support or your Account Manager.

Things to consider going forward

- Try to balance the amount of effort to implement temporary changes with the impact those changes will have. It may not be worth several hours of staff or support time to design and implement changes that will only be needed for the few days of a reopening transition.
- Consider using Amnesty mode to backdate check-ins to inside the closed period.
- If you plan to quarantine items coming into the library, consider using the Capture Local Holds as Transits check-in modifier to delay marking incoming items captured for holds as shelf-ready.
- Consider spreading out due dates and hold expirations — Equinox can help with this!
  - One idea to consider is to add the original circulation duration to the new open date.
  - Another is to add an additional random extension to each to spread them out.
- Consider directly adjusting open circulations to limit fines — Equinox can help with this!
- If you are doing curbside service and want to assess fines, consider making the library "open" and using a maintenance message on the OPAC.
- Try to avoid putting too much time into policy changes to restrict resource sharing if they are likely to be temporary — they are complicated, take time to design correctly, and are high-effort. Other simpler settings and human intervention may be all you need for a rolling or staggered reopening.
  - Consider restricting transits for a while at reopening by creating a set of new age-protection rules for "100 years, system range" and "100 years, branch range." Record the original values of copies in a separate table and batch change them to the appropriate new setting. Equinox can help you with this!
- Think about your Action/Trigger Notifications
  - Consider disabling any automatic lost or long-overdue event definitions for a while.
  - Action/Trigger max-delay values may need to be extended to cover the long-term closure; consider adding 45-60 days to this for lost, long-overdue, and similar event definitions
  - Think about pre-due courtesy notices; do they need to be reset?
  - Hold available notices might likewise need to be reset or adjusted so they can be resent.
  - If you decide to use the new curbside pickup feature, you should consider adjusting your hold is available notifications to mention the option of curbside pickup. The feature also comes with new notifications to offer curbside pickup and confirm appointments.
  - Equinox can assist with notice configuration!