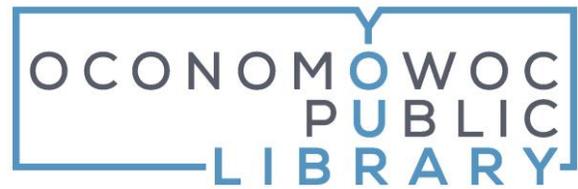


NEW HOME SERVICE PATRON CHECKLIST



POLARIS ACCOUNT

- Create library card for patron if needed or update registration
 - Change status to Outreach
 - Change phone numbers
 - Move the patron's phone number listed in Phone 1 to Phone 2
 - Type "DO NOT CALL" into Phone 1 (must do in Polaris, not LEAP)
 - Select Maintain Reading History
 - Select to exclude Overdue, Hold, Billing, Almost Overdue, Patron Record, Inactive, and Collection Agency
 - Add account to Outreach Services
- Access Outreach Module
 - Enter genres, authors, topics into Preferences
 - Select generated titles to create list
 - Sort list by call number and print

FOLDER

- Print patron name LAST NAME, FIRST on label and put on folder
- Fill folder with
 - Patron Information Excel document (laminated)
 - Directions and map to patron's house and back to library (laminated)
 - Notes from Special Service Coordinator document
 - Generated reading list from Polaris

CHECKOUT DESK

- Update Patron List for Circ document
- Print patron's barcode at <https://www.ruggedtabletpc.com/barcode-generator>
 - Select Code 39 and Small Size
 - Save with patron name in Sample Labels document
 - For Circulation: LAST NAME, FIRST NAME and HOME SERVICES PATRON
 - For Special Services Coordinator: FIRST NAME LAST NAME

FOR PATRON

- Home Service Guidelines (laminated)
- Home Service Policy Agreement Form (to be signed and returned to Special Services Coordinator)
- Home Service Policy

FOR VOLUNTEER

- Volunteer Guide
- Liability Waiver for Home Service Volunteers (two copies, one for volunteer and one to be signed and returned to Special Services Coordinator)