

July 27, 2020, revised September 16, 2020 and July 7, 2021

Recommendations for Reference/Research Consultation/Reading Room Services, (Bob-Research Consultation, Patricia-Reading Room Services)

Note: Bob Diaz and Patricia Ballesteros worked collaboratively on this document. Bob focused on the reference section and Patricia Ballesteros focused on the reading room section.

Recommendation: Use LibAnswers to manage all patron interactions.

- Bob Diaz manages the LibAnswers system throughout the work week and distributes questions/queries to the appropriate staff. Patricia Ballesteros & Erika Castano are his back up.
- Libanswers is the mechanism by which we initially respond to instruction requests, digitization requests, duplications requests, donor-related questions and reference queries.
- All queries and requests that are received outside the Libanswers system by our staff are supposed to be forwarded to LibAnswers. This includes phone call queries and those that are sent via email directly to a librarian, archivist or curator. If a phone call comes in, for example, the person receiving it sends an email to askspcoll with the pertinent information to create a record of the query. If an email query is sent, it should be forwarded from the librarian/curator/archivists email to askspecoll and further communication should take place within the Libanswers system. This will help with tracking our interactions with patrons and with scheduling patron visits to the reading room as well as any other requested provision of services.
- Bob responds to all queries within 48 hours and takes care of those reference queries which he can answer himself.
- If the patron requests an appointment, Bob will determine whether the curator should be involved or not. If it's clear to Bob that the patron needs to come in to see material, he will forward the request to Patricia to set up the appointment.
- If a subject specialist needs to intervene, Bob will forward the query to that person and after consulting with the patron, a determination will be made by the curator as to whether or not an appointment is warranted.

- If so, the patron request for an appointment is forwarded to Patricia for scheduling.
- If the patron's needs can be met by providing digital copies of materials, the query is forwarded to Patricia for handling.
- Bob responds to all permissions requests, consulting with others as appropriate.
- Bob forwards all duplications and digitization requests to Patricia for management.
- Patricia communicates with the patron regarding duplications and digitization requests and works with others to manage the digitization/duplications processes.
- Bob forwards questions that require subject expertise to the appropriate archivist/curator.
- All communication between the patron and the archivist/curator should take place within the Libanswers system. If other means of communication are used, the archivist/curator is encouraged to record key points of discussion and decisions in the Libanswers system.

Recommendation: Provide appointment only use of reading room and archival materials. (provided that the provision of digital resources will not meet the patron's needs.)

Scheduling patron visits:

- If after reviewing the request, Bob, in consultation with others as appropriate, decides that the patron does indeed need to visit Special Collections, Patricia will use the ***LBRY-askscrepro@email.arizona.edu*** email account to make contact with the patron, and sends the patron an online registration form.
- The patron fills it out and returns it to the aforementioned email account.
- The form is available at:
https://uarizona.co1.qualtrics.com/jfe/form/SV_6lhjDZ7Qc5EGddb.
- The returned form gets routed automatically from the ***LBRY-askscrepro@email.arizona.edu*** account to LibAnswers both as a pdf and as a text message.

- Patricia reviews the form to be sure it is complete and begins the scheduling process, asking the patron to provide three possible dates and times that they are available to visit during Special Collections hours of operation.
- Patricia asks the patron to provide a list of materials (with complete citations) needed during the visit.
- The appointment must be set at least 10 days in advance of the visit.
- Patricia schedules the appointment for the patron and informs them of the time and date of it.
- Once the customer has confirmed/agreed to the date & time, it will be posted on W2W under the *In-person Schedule Appointment* section of W2W. LibAnswers ID number is included so entries are fully cross-reference.
- Patricia will inform the staff scheduled for desk duty on the day and time of the appointment that someone will be coming in to use the reading room during their shift.
- Patricia will coordinate with her student assistants to ensure all requested items are present and ready for the patron's visit.
- Patricia will work with her students on proper paging procedures.

Recommendation: Staffing the reading room

- The reading room will be available by appointment only for use by researchers Monday through Thursday from 10am to 4pm.
- All Special Collections staff will be expected to spend scheduled time at the service desk as needed when patrons are in the reading room.
- Patricia will coordinate and manage the staff schedule using the When to Work program.
- The When to Work program will include the staff schedule as well as any scheduled appointments.

Recommendation: Reading room procedures:

- Patrons will need to fill out an online registration form prior to their visit. Patricia will work with the patrons and provide instructions on how to do this.
- Patron appointments will be 1.5 hours or less per visit.
- Prior to the appointment, the staff member on duty will:
 - place a door stopper on the door next to the lockers and on one of the doors leading to the reading room.
 - Ensure all requested items are on a cart by an assigned table
 - Ensure that all online forms have been completed.
- Staff will greet patrons at the entrance to Special Collections
- Patrons will need to present their identification prior to entering and asked to wash their hands and to put all personal belongings, with the exception of their Catcard and personal electronics, in a locker prior to entering the reading room. Gloves are only used when handling photographs.
- Patrons will be encouraged to avoid touching eyes, nose and mouth, and will be encouraged to practice social distancing (at least 3 feet) from others.
- Customers are strongly encouraged to wear face masks. This practice is strongly encouraged at all of our campuses in Arizona, especially during group activities in indoor settings.
- Staff will then escort them to the reading room.
- The patron will be assigned a table with a cart of the materials beside it that they've asked to see.
- Vault items will be viewed first and will be sent back into the vault after viewing.
- Patrons will only be allowed to take photos (without using a flash) of the material. Onsite scanning will be available.
- Patrons can request online scans (regular scans .25 cents a page /high resolution \$10.00 per image).
- There can only be one appointment at a time in the reading room at any given time.
- Instructions for Patrons:
 - Only one manuscript box should be on the table at any given time.
 - View only two books at a time.

- Patrons can only view one folder at a time of photos and miscellaneous materials

After a Patron's Visit:

- Clean and disinfect area where patron was situated (Include: Chair & Table)
- Quarantine is no longer required
- After items have been viewed they will be shelved following Special Collections' normal shelving process.
- Clean door handles, lockers, restroom handles, surfaces patron might have come across (Circulation desk, pencils, pens etc.)
- If the patron used the restroom, we will need to clean all the handles (the handle of the water faucet, stall handle, soap dispenser and the handle of the paper dispenser.
- After cleaning the designated areas, please wash your hands.