

**Wegner Health Science
Information Center**

**Evening and Weekend Circulation
Staff Training**

**To fulfill the requirements for
ITC575-S70
Instructional Design Principles**

Summer 2003

**Submitted to:
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Intent Statement

Instructional Topic

Wegner Health Science Information Center
Evening and Weekend Circulation Staff Training

Intended Setting

Wegner Health Science Information Center Computer Classroom (Group Training)
Wegner Health Science Information Center Circulation Desk (Individual Training)

Target Audience

Wegner Health Science Information Center weekend and evening staff consisting of retired physicians, nurses, other allied health professionals, and elderly volunteers.

Supporting Details

The Wegner Health Science Information Center (Wegner Center), which opened in 1998, is a consortium library that supports the clinical, educational, and research activities of eleven partner organizations that include the University of South Dakota School of Medicine, South Dakota State University Colleges of Nursing and Pharmacy, Mount Marty College Nurse Anesthesia Program, Sioux Valley Hospital & USD Medical Center/Sioux Valley Hospitals and Health System, the VA Regional Medical Center, and five other smaller partner organizations.

The Wegner Center uses the Minnesota State Colleges and University/Project for Automated Library Services (better known as the PALS system) as its online catalog system and for its circulation, interlibrary loan, and acquisition processes. An extensive manual exists for the PALS system and is available for download from the PALS web site at www.pals.msus.edu/pals/docs/home.html. The South Dakota Library Network (SDLN) has also developed a PALS manual that is available for download from the SDLN web site at www.sdln.net/support/manual.html. Both of these manuals are technical by nature including extensive information necessary for the library tech services staff. However, this technical information is not necessary for the evening and weekend circulation staff. While the PALS manuals do include the information needed to use the PALS system – load patron records, display patron records, etc. – they are not intuitive in design and do not include information specific to the Wegner Center – such as patron classes or partner affiliations.

The Wegner Center's evening and weekend staff consists of retired physicians, nurses, other allied health professionals, and elderly volunteers. While this gives the Wegner Center a staff that is very knowledgeable in the library's subject matter and dedicated to the mission of the Wegner Center, it is a staff that requires step-by-step instruction in circulation procedures that are specific to the Wegner Center. Training of the evening and weekend circulation staff using the PALS manuals available for download from the Minnesota State Colleges and University/Project for Automated Library Services and the South Dakota Library Network web sites have proven unsuccessful. The evening and weekend circulation staff still need frequent assistance with data entry and library staff must frequently monitor their data entry precision. Training and training materials that are focused to the intended audience will be developed.

The training and training materials will focus on the six primary processes performed by the evening and weekend circulation staff:

- checking out materials,
- renewing materials,
- loading a patron record,
- displaying a patron record,
- removing a patron hold, and
- placing materials on hold.

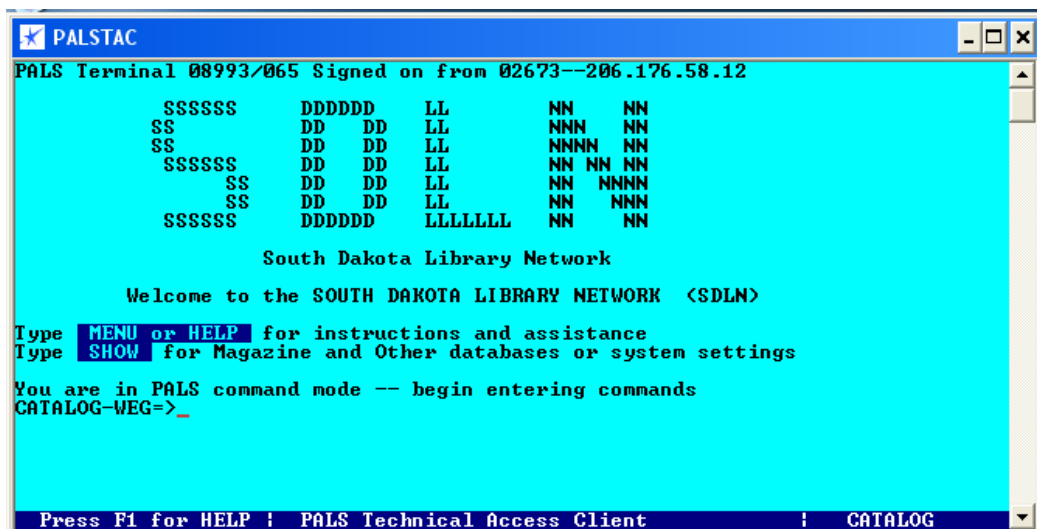
Analysis of Needs and Goals

Problem Identification

Background Information

The Wegner Health Science Information Center (Wegner Center), which opened in 1998, is a consortium library that supports the clinical, educational, and research activities of eleven partner organizations that include the University of South Dakota School of Medicine, South Dakota State University Colleges of Nursing and Pharmacy, Mount Marty College Nurse Anesthesia Program, Sioux Valley Hospital & USD Medical Center/Sioux Valley Hospitals and Health System, the VA Regional Medical Center, and five other smaller partner organizations.

The Wegner Center uses the Minnesota State Colleges and University/Project for Automated Library Services (better known as the PALS system) as its online catalog system and for its circulation, interlibrary loan, and acquisition processes. While many automated library systems, such as ExLibris, Endeavor, and SIRIS, employ an easy to use and intuitive graphic user interface (GUI) via the Internet, the PALS system does not. The PALS system employs a disk operating system (DOS) and alpha based command system that operates via a telnet connection to the South Dakota Library Network (SDLN), which manages and maintains PALS in South Dakota. Following is a screen shot of the PALS opening screen.



```
PALSTAC
-----
PALS Terminal 08993/065 Signed on from 02673--206.176.58.12

  SSSSSS   DDDDDD   LL       NN   NN
  SS       DD  DD   LL       NNN  NN
  SS       DD  DD   LL       NNNN NN
  SSSSSS   DD  DD   LL       NN  NN NN
           SS  DD  DD   LL       NN  NNNN
           SS  DD  DD   LL       NN  NNN
  SSSSSS   DDDDDD   LLLLLL  NN   NN

          South Dakota Library Network

          Welcome to the SOUTH DAKOTA LIBRARY NETWORK <SDLN>

Type  MENU or HELP  for instructions and assistance
Type  SHOW          for Magazine and Other databases or system settings

You are in PALS command mode -- begin entering commands
CATALOG-WEG=>
```

Using the PALS system requires the user to be proficient and comfortable with DOS/alpha commands, keyboard shortcuts, and an illogical abbreviation system. The ability of the Wegner Center staff to be proficient and comfortable with the PALS system is necessary for two reasons. First, it is essential that the circulation transactions entered into the PALS system are accurate – for the patron as well as

the Wegner Center. Second, it is essential that the circulation transactions be quick and efficient for the patron.

The Wegner Center's full time circulation staff are experts in the use of the PALS system. The full time circulation staff are trained librarians working at least forty hours per week. Not only are they experts at the using the PALS system for processing patron circulation transactions, but they are also expert in using the more technical components of the PALS circulation features.

The Wegner Center's evening and weekend circulation staff consists of retired physicians, nurses, other allied healthcare professionals, and elderly volunteers. Most of the evening and weekend circulation staff members work less than ten days per month for less than six hours a day. While this gives the Wegner Center a staff that is very knowledgeable in the library's subject matter and dedicated to the mission of the Wegner Center, it is a staff that tends to be wary of computers, unfamiliar with computer terminology, and require step-by-step procedures for processing patron circulation transactions including those specific to the Wegner Center. Also because of the limited hours the evening and weekend circulation staff work they require frequent reminders of the DOS/alpha commands, keyboard shortcuts, and abbreviations required by the PALS system.

The Current Status

Currently the Wegner Center's circulation manger, full time circulation staff, and patrons have indicated that the evening and weekend circulation staff, while enthusiastic and motivated, are having continuing difficulties with the PALS system while processing patron circulation transactions. The circulation manager finds many notes, voicemail messages, and e-mails when she returns to work in the mornings or on Mondays from the evening and weekend circulation staff indicating they were unable to initiate or complete a patron circulation transaction. Because the processing of patron circulation transactions is not being adequately initiated and completed in the evenings and on weekends, multiple problems have developed. They include but are not limited to:

- patrons receiving overdue fines for books that never left the library,
- patrons returning books that were never checked out to them,
- inaccurate holds being place on library items,
- inaccurate and incomplete patron information being loaded into the PALS system,
- staff inability to answer patrons questions about what they currently have checked out,
- ineligible patrons being granted library privileges, and
- ongoing loss of statistics concerning evening and weekend usage.

The Optimal Status

The Wegner Center circulation manager and full time circulation staff indicate that the optimal status would be that the evening and weekend circulation staff

would be able to proficiently and efficiently process patron circulation transactions. The problem analysis will identify the need that exists between the current and optimal status.

Problem Analysis

Interviews with the Wegner Center's circulation manager and full time circulation staff reveal that frustration is growing over the "seeming inability of the evening and weekend staff to learn how to use the PALS system." When the circulation manager was questioned about the training that the evening and weekend staff received, she indicated that it was adequate. The circulation manager also indicated that the supporting documents the evening and weekend staff have access to more than provide the information they need to "look something up." When asked if the full time circulation staff ever worked with the evening and weekend staff to provide "hands on – at the circulation desk" support and mentoring, the circulation manager responded that just by providing the training at the circulation desk that "hands on – at the circulation desk" support and mentoring was provided. When asked what patron circulation transactions the evening and weekend staff need to be proficient and efficient in processing, the circulation manager identified six tasks:

- checking out materials,
- renewing materials,
- loading a patron record,
- displaying a patron record,
- removing a patron hold, and
- placing materials on hold.

Interviews with the Wegner Center's evening and weekend staff reveal their frustrations at the PALS system, it not being "like Windows," and their not being able to quickly find or interpret the information they need from the manuals provided by the circulation manager. The evening and weekend circulation staff also voiced their concern that the manuals did not include information specific to the Wegner Center. When the evening and weekend staff were questioned about the training they had received they indicated it was quick, lacked focus, and didn't provide them the "handouts" to refer back to that they would have liked. When asked if it would be useful for full time circulation staff were to provide "hand on – on the desk" support and mentoring all of the evening and weekend staff agreed that was one step that was lacking in their training and orientation. When asked what patron circulation transactions they most often processed in the evenings and on weekends, the evening and weekend staff evening identified five tasks:

- checking out materials,
- renewing materials,
- loading a patron record,
- displaying a patron record, and
- placing materials on hold.

Both the Wegner Center's circulation manager and the evening and weekend staff described the previous training in processing patron circulation transactions in the same way. Training of the evening and weekend circulation staff has been one-on-one provided by the circulation manager or full time circulation staff at the circulation desk when they begin their employment or volunteer service. The training has been less than an hour in duration and occurs while the trainer is actively working the circulation desk. The evening and weekend circulation staff are then referred to two PALS manuals if they have any questions. The two PALS manuals that are provided to the evening and weekend staff are extensive technical computer software manuals which may be confusing to user with limited DOS/alpha numeric experience. The first was developed by PALS and is available for download from the PALS web site at www.pals.msus.edu/pals/docs/home.html. The second manual, developed by SDLN with specific South Dakota information included, is available for download from the SDLN web site at www.sdlm.net/support/manual.html. Inspection of these manuals reveal that the two PALS manuals do include the information needed by the evening and weekend staff to use the PALS system to process patron circulation transaction in an proficient and efficient manner. However, both of these manuals are technical by nature including extensive information necessary for the full time circulation staff – technical information that is not necessary for the evening and weekend circulation staff. While the PALS manuals do include the information needed to use the PALS system – load patron records, display patron records, etc. – they are not intuitive in design and do not include information specific to the Wegner Center – such as patron classes or partner affiliations.

After interviewing the Wegner Center circulation manger, full time circulation staff, and the evening and weekend circulation staff and inspecting the written documentation four problems were identified. First, the Wegner Center utilizes the PALS system, an automated library system that is not user friendly and requires consistent and frequent use to become proficient and efficient in processing patron circulation transactions. Second, the training provided by the circulation manager and full time circulation staff for evening and weekend circulation staff is inadequate in content, focus, and time. Third, the circulation manager and full time circulation staff needed to provide support and mentoring “hands on – at the circulation desk” to the evening and weekend circulation staff for a limited time after training not just during training. And fourth, the written documentation provided to the evening and weekend circulation staff does not meet their specific and limited needs.

Problem Solution

Four specific problems were identified that need to be corrected in order to move from the current state – inability of the Wegner Center evening and weekend staff to proficiently and effectively process patron circulation transitions – to the

optimal state – ability of the Wegner Center evening and weekend staff to proficiently and effectively process patron circulation transitions.

The first problem identified by the problem analysis, the PALS system, an automated library system that is not user friendly, is beyond the control of the Wegner Center to remedy. The Wegner Center, through its association with SDLN, must use the PALS system to have access to the catalogs of other libraries in the state, to have access the free consortia interlibrary loan system available throughout the state and region, and to have access to inexpensive bibliographic catalog records. Therefore, the solution to moving from the current status to the optimal status lies in correcting the three remaining problems.

The second problem identified by the problem analysis is the inadequate training of the Wegner Center evening and weekend staff by the circulation manager and full time circulation staff and may be corrected by addressing the three training components – time, focus, and content.

Time – the training should be longer in length. One hour, especially an unfocused hour, is not enough time for the circulation manager or full time circulation staff to adequately train evening and weekend circulation staff – who are wary of computers and unfamiliar with computer terminology – to become comfortable or proficient with the technology they need to use in the processing of six separate patron circulation transactions. Further interviews or surveys of the circulation manager and evening and weekend circulation staff will help identify the exact length of training needed. Options include:

- providing half hour training sessions on each individual patron circulation transaction for a total of six sessions,
- providing two to three hour training sessions on several of the patron circulation transactions (two to four in each session), or
- providing one four to six hour training session on all six of the patron circulation transactions.

Focus – the training should occur in a quiet, focused location. For the circulation manager and full time circulation staff to attempt to train the evening and weekend staff at the circulation desk while actively working the circulation desk leads to a very unfocused training session – for the trainer and the trainee. The training of the evening and weekend circulation staff should occur away from the circulation desk in either a computer classroom for group training, or in a private office for individual training.

Content – the training and training materials needs to be specific to the six patron circulation transitions and to the Wegner Center. The circulation manager and full time circulation staff need to provide the evening and weekend circulation staff with training and training materials that are specific to the six patron circulation transactions and to the Wegner Center. A training manual with step-by-step procedures and screen shots of the PALS data entry

screen for each of the six patron circulation transactions needs to be developed and used at the time of training. The training needs to occur at a computer with PALS active so that the evening and weekend circulation staff can enter data with the manual in hand. The training manual may also be used for self-directed training by evening and weekend circulation staff with computer experience. The training manual or components of the training manual may also be used as “quick guides” at the circulation desk.

The third problem identified by the problem analysis is the lack of “hands on – at the circulation desk” support and mentoring of the evening and weekend circulations staff following the initial training by the circulation manager or full time circulation staff. This problem may be remedied by assigning a full time circulation staff to mentor one or more evening and weekend circulation staff. This would require the mentee to work at the circulation desk with the mentor for a specified amount of time. Some mentees may require more support and mentoring time than others. The “real life” support and mentoring will reinforce the formal training received by the evening and weekend circulation staff.

The fourth and final problem identified by the problem analysis is the need for training materials specific to the patron circulation transactions processed by the evening and weekend circulations staff and specific to the Wegner Center. The two PALS manuals utilized by the circulation manager and full time circulation staff will be utilized to create a concise, specific and easy to follow procedure manual and quick guides for the evening and weekend circulation staff to utilize.

Articulated and Prioritized Goals

The Wegner Center evening and weekend circulation staff will be able to proficiently and efficiently process patron circulation transactions while staffing the circulation desk and will be able to use the procedure manual and quick guides. The six patron circulation transactions they will be able to process are:

- checking out materials,
- renewing materials,
- loading a patron record,
- displaying a patron record,
- removing a patron hold, and
- placing materials on hold.

Task Analysis

Introduction

An analysis of needs and goals has been conducted resulting in the following articulated and prioritized instructional goal:

The Wegner Center evening and weekend circulation staff will be able to proficiently and efficiently process patron circulation transactions while staffing the circulation desk and will be able to use the procedure manual and quick guides. The six patron circulation transactions they will be able to process are:

- checking out materials,
- renewing materials,
- loading a patron record,
- displaying a patron record,
- removing a patron hold, and
- placing materials on hold.

The following task analysis will:

- identify the instructional steps required to achieve the goal,
- analyze the instructional steps to determine subordinate skills required for the learner to achieve the goal,
- analyze the steps and subordinate skills to determine entry behaviors required for the trainee to master before beginning instruction, and
- identify the instructional and goal learning domains.

Subject-Matter Expert

The subject matter expert is Sue Carlson, circulation manager at the Wegner Health Science Information Center (Wegner Center). Sue has been the circulation manager at the Wegner Center since it opened in January 1998. Prior to assuming the circulation manager position at the Wegner Center, Sue was the circulation manager at Concordia College in Moorhead, Minnesota for ten years and the circulation manager at Lincoln High School in Sioux Falls, South Dakota for two years. Sue has over seventeen years experience using the Minnesota State Colleges and University/Project for Automated Library Services (PALS) system for circulation, interlibrary loans, and acquisitions. (Hereafter the subject matter expert, Sue Carlson, will be referred to as the SME.)

As the instructional designer, I (Ernetta Fox), have over five years experience using the PALS system, three of those as a staff member at the Wegner Center. I also have over twenty years experience in adult and higher education. I have prepared training for and trained older adults, nontraditional students, and volunteers for a variety of positions in academic libraries. (Hereafter the instructional designer, myself, will be referred to as the ID.)

Task Analysis Method – Procedural Analysis

A procedural analysis is being completed for this instructional design because the instruction being developed will be for specific procedures and tasks required to process patron circulation transactions. The procedural analysis will be completed in five steps: task inventory; task selection; task decomposition and description; task sequencing; and flowcharting.

To begin the procedural analysis the SME and the ID met and completed the six patron circulation transactions that the evening and weekend circulation staff will be required to process proficiently and efficiently. The six patron circulation transactions were processed in an active PALS session. During this meeting the SME and the ID completed the first two steps of the procedural analysis, task inventory and the task selection.

Task Inventory – The purpose of the task inventory is to list the task, or processes, to be taught by the instruction being designed. While the six patron circulation transactions have been briefly described in the instructional goal, the SME and the ID expanded the definition of the six patron circulation transactions for the task inventory.

- Check out materials to Wegner Center patrons (known in PALS terminology as charging materials).
- Renew materials (extending the check out period) for Wegner Center patrons.
- Load a patron record (establishing a library card) for new Wegner Center patrons.
- Display a Wegner Center patron record (to view fines, materials checked out, and other patron information).
- Remove a Wegner Center patron hold (known in PALS terminology as overriding charges).
- Place a hold on materials for Wegner Center patrons.

Task Selection – The purpose of the task selection is to decide which tasks are to be included in and developed for instruction. For this first, initial training session, the SME and the ID discussed in depth which of the patron circulation transactions were absolutely essential for evening and weekend circulation staff to know how to process proficiently and efficiently. (By proficiently and efficiently, the SME and the ID mean without assistance and without having to refer constantly to or rely completely on a quick guide or manual.) While in an ideal world the evening and weekend circulation staff would be proficient and efficient in all six of the patron circulation transactions, time and staffing constraints will not allow for extended instruction periods. Time and staffing constraints also will not allow for the extended follow up mentoring suggested in the analysis of needs and goals if all six patron circulation transactions were taught at once. Of the six patron circulation transactions, two – checking out materials and loading a patron record – were identified as being absolutely essential for the evening and weekend

circulation staff to process proficiently and efficiently. These two patron circulation transactions are the two most frequently used at the circulation desk. They are also the two patron circulation transactions that are most frequently completed for the same patron at one time. The other four patron circulation transactions were identified as processes that the evening and weekend circulation staff could ask for assistance with or take the time to follow a manual or quick guide. It was decided that the following two patron circulation transactions be developed for instruction.

1. Check out materials to Wegner Center patrons (known in PALS terminology as charging materials).
2. Load a patron record (establishing a library card) for new Wegner Center patrons.

The task selection process led to a refinement and revision of the instructional goal. The instructional goal is now:

The Wegner Center evening and weekend circulation staff will be able to proficiently and efficiently check out materials to Wegner Center patrons and load a patron record.

Task Decomposition and Description – The purpose of task decomposition and description is to breakdown the tasks into the steps (skills) and the substeps (subskills) that are required to complete the task. The ID completed the task decomposition and description independently of the SME. The completed task decomposition and description was then reviewed by and discussed with the SME. Changes and additions were then made to the task decomposition and description.

Each of the patron circulation transactions to be taught require the same entry behaviors (skills) the evening and weekend circulation staff must have prior to instruction. Entry level behaviors (skills) will be indicated by an asterisk (*).

1. Check out materials to Wegner Center patrons (known in PALS terminology as charging materials).
 - 1.1. Determine if the patron has a Wegner Center library card.
 - 1.1.1. If yes, proceed to 1.2.
 - 1.1.2. If no, proceed to step 2.1.
 - 1.2. Obtain materials to be checked out from patron.
 - 1.3. Activate PALS system on circulation computer.
 - 1.3.1. Basic computer skills, keyboarding skills, and computer operations ability.*
 - 1.4. Scan the barcode on the Wegner Center library card with scanner.
 - 1.4.1. Basic barcode scanner skills.*
 - 1.5. Scan the barcode on each of the Wegner Center materials to be checked out to the patron.
 - 1.5.1. Basic barcode scanner skills.*

- 1.5.2. Knowledge of barcode locations on Wegner Center materials.*
 - 1.6. Key down to the proceed command and press enter.
 - 1.7. Write the due date displayed in PALS on a Wegner Center return slip.
 - 1.8. Place return slip in Wegner Center materials.
 - 1.9. Desensitize each of the Wegner Center materials being checked out by running them through the appropriate desensitizer.
 - 1.9.1. Basic printed material desensitizer skills.*
 - 1.9.2. Basic audio/visual material desensitizer skills.*
 - 1.10. Tell patron when materials are due.
 - 1.11. Return Wegner Center library card and checked out materials to patron.
2. Load a patron record (establishing a library card) for new Wegner Center patrons.
 - 2.1. Have patron fill out a Wegner Center library card request form.
 - 2.2. Activate PALS system on circulation computer.
 - 2.2.1. Basic computer skills, keyboarding skills, and computer operations ability.*
 - 2.3. Obtain Wegner Center library card from drawer at circulation desk.
 - 2.4. Enter "LPR" at the PALS prompt and press enter.
 - 2.5. Enter system password when prompted and press enter.
 - 2.5.1. Have obtained and memorized system password.*
 - 2.6. Enter information into the required fields in PALS in the order set by the PALS workform. The information to be entered is from the Wegner Center library card request form completed by patron and from PALS dropdown menus for Wegner Center specific information.
 - 2.6.1. Determine record type.
 - 2.6.1.1. Enter "L" for local.
 - 2.6.1.2. Enter "S" for student.
 - 2.6.1.3. Enter "F" for faculty.
 - 2.6.2. Scan patron barcode ID from back of Wegner Center library card.
 - 2.6.3. Enter patron registration ID – the last nine numbers of the patron barcode ID.
 - 2.6.4. Determine if patron will be using their social security number.
 - 2.6.4.1. If yes, enter patron's social security number.
 - 2.6.4.2. If no, enter generated ID – date (mm/dd/yy) + last three digits of library card bar code.
 - 2.6.5. Enter patron's last name from the Wegner Center library card request form.
 - 2.6.6. Enter patron's first name from the Wegner Center library card request form.

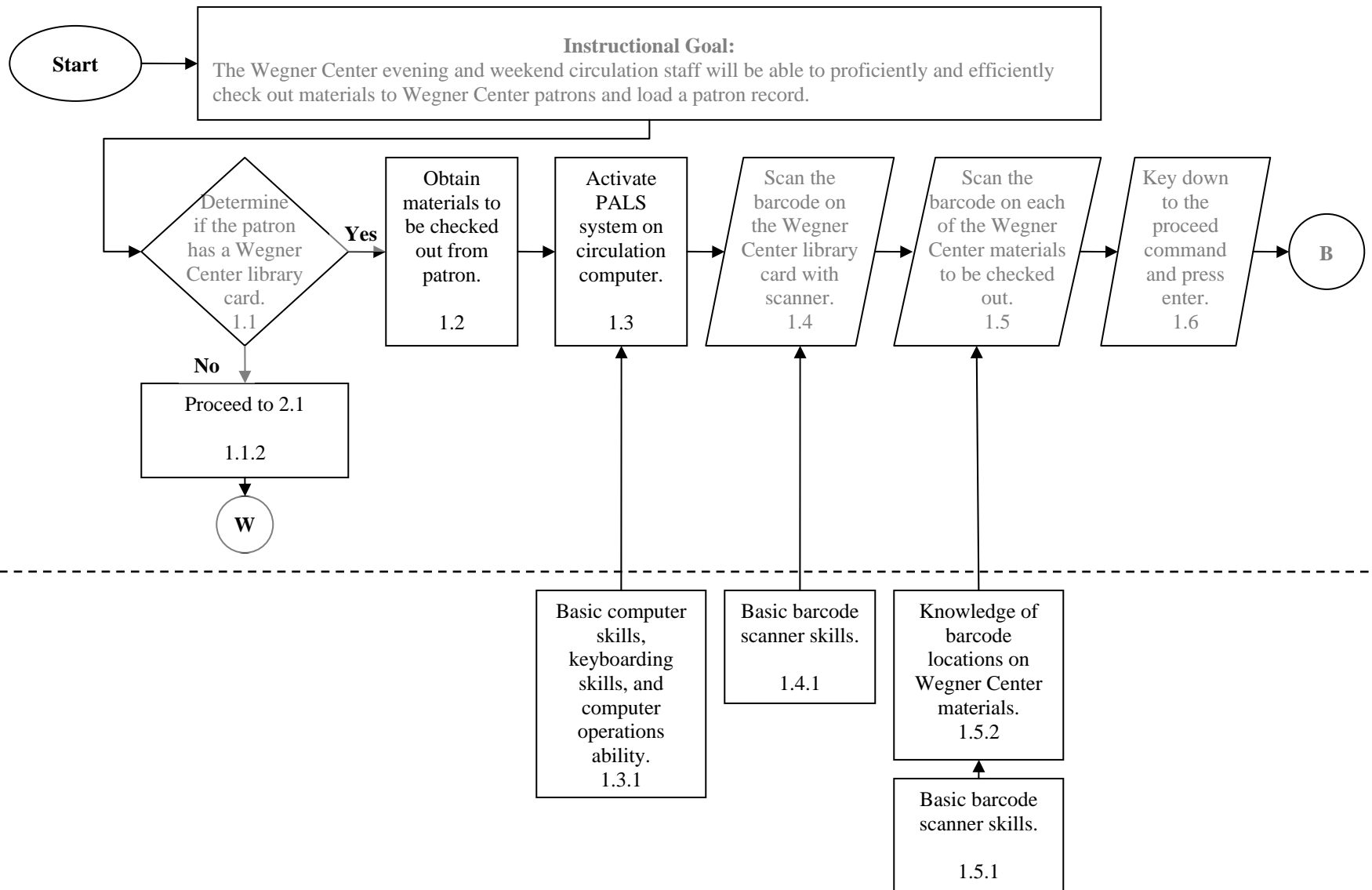
- 2.6.7. Enter patron's middle initial from the Wegner Center library card request form.
- 2.6.8. Enter patron circ class from the Wegner Center library card request form.
- 2.6.9. Enter expiration date – two years from the date the library card is being issued.
- 2.6.10. Enter address to use – always enter “1.”
- 2.6.11. Determine distance patron status.
 - 2.6.11.1. Enter yes if not a Sioux Falls resident
 - 2.6.11.2. Enter no if a Sioux Falls resident.
- 2.6.12. Determine if patron is a minor.
 - 2.6.12.1. If yes, enter guardian name from the Wegner Center library card request form.
 - 2.6.12.2. If no, proceed to next step.
- 2.6.13. Enter address #1 – home address from the Wegner Center library card request form.
 - 2.6.13.1. Enter address line 1.
 - 2.6.13.2. Enter address line 2 if needed.
 - 2.6.13.3. Enter city.
 - 2.6.13.4. Enter state.
 - 2.6.13.5. Enter zip code.
 - 2.6.13.6. Enter telephone number.
- 2.6.14. Enter address #2 – business address from the Wegner Center library card request form if applicable.
 - 2.6.14.1. Enter address line 1.
 - 2.6.14.2. Enter address line 2 if needed
 - 2.6.14.3. Enter city.
 - 2.6.14.4. Enter state.
 - 2.6.14.5. Enter zip code
 - 2.6.14.6. Enter telephone number.
- 2.6.15. Enter e-mail address from the Wegner Center library card request form.
- 2.7. Key down to the proceed command and press enter.
- 2.8. Give Wegner Center library card to patron.

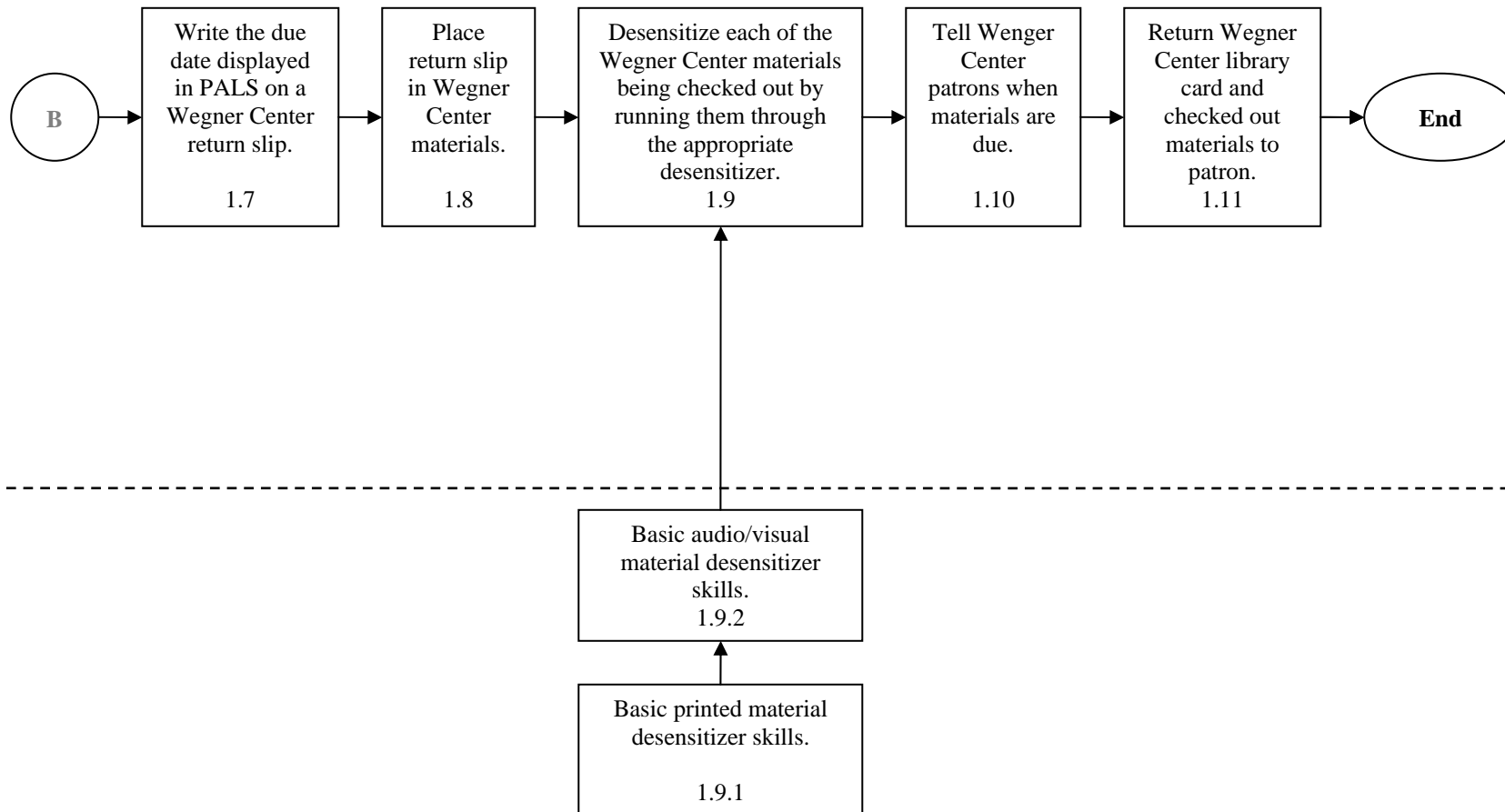
Task Sequence – The purpose of the task sequence step is to determine the order in which the instruction will be delivered. The SME and the ID agree that the more difficult of the two patron circulation transactions should be taught first. It is also the one that evening and weekend circulation staff have had the greatest difficulty with in the past. The two patron circulation transactions will be taught in the following order.

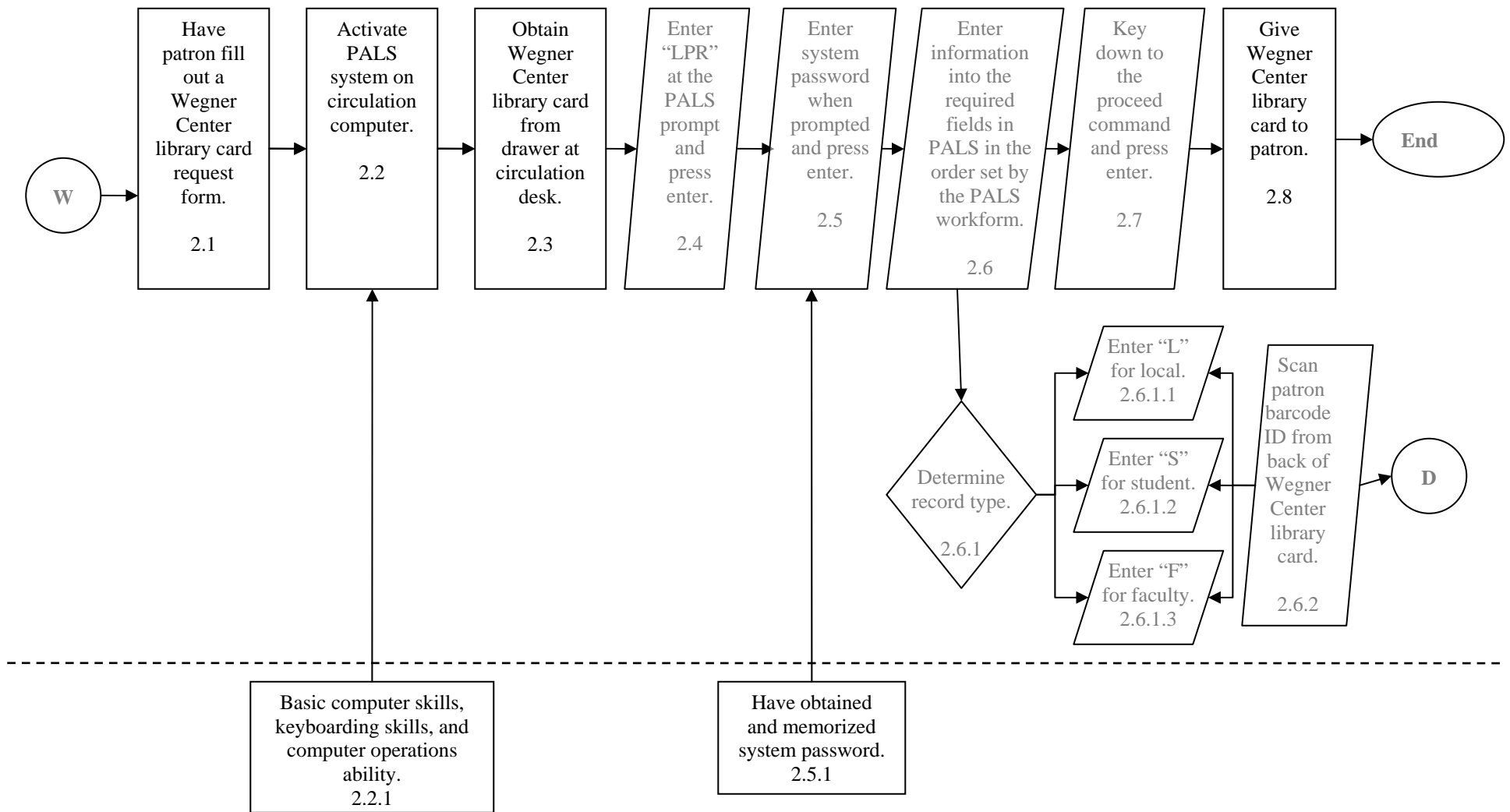
1. Load a patron record (establishing a library card) for new Wegner Center patrons.
2. Check out materials to Wegner Center patrons (known in PALS terminology as charging materials).

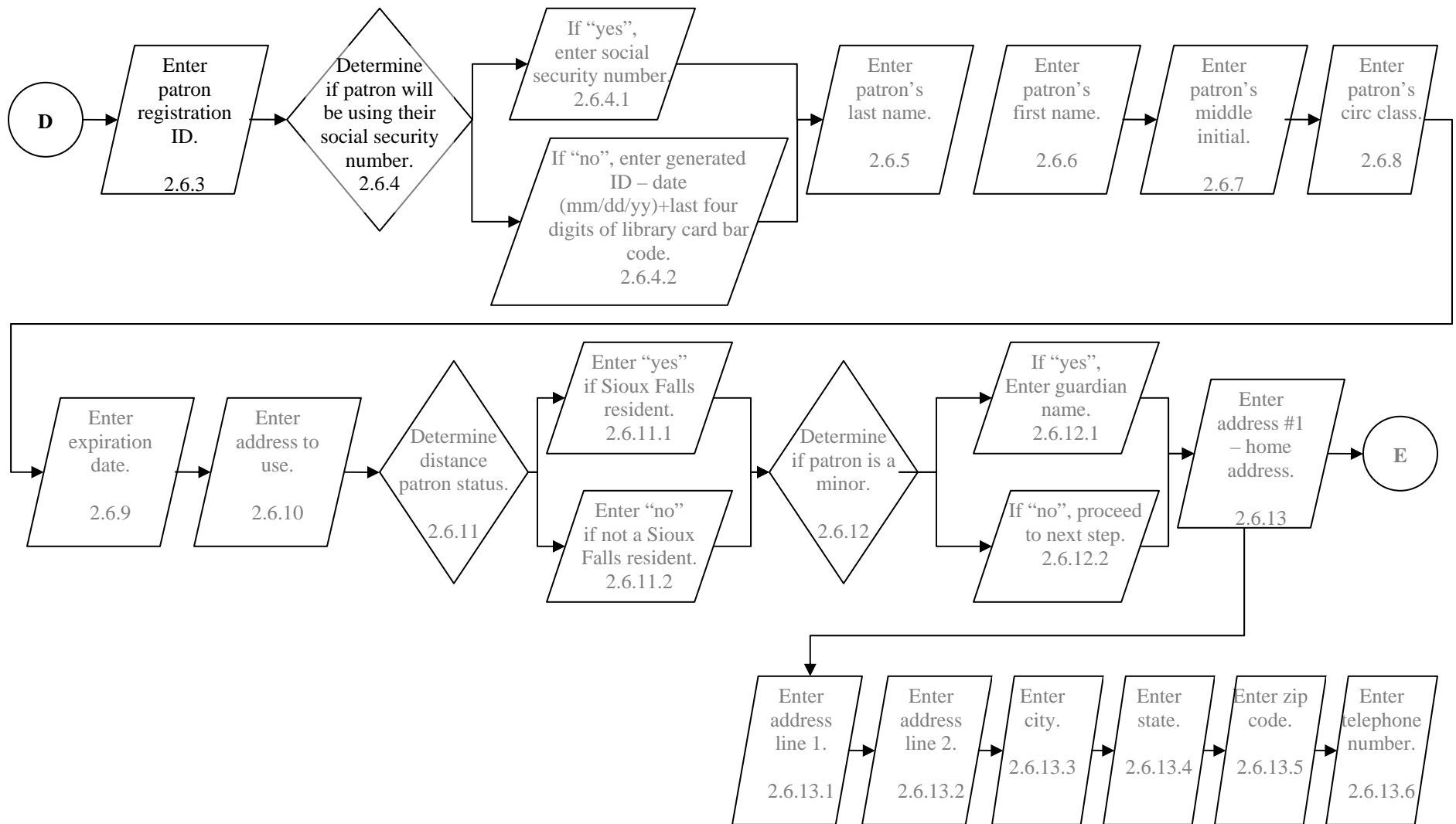
Flowchart – the purpose of creating a flowchart is to provide a graphical representation of the instruction process. The flowchart will assist the SME and the ID identify any missing steps, missed skills, or other flaws in the instructional design. The flowchart will also assist in clarifying the type of steps – input/output, process, or decision.

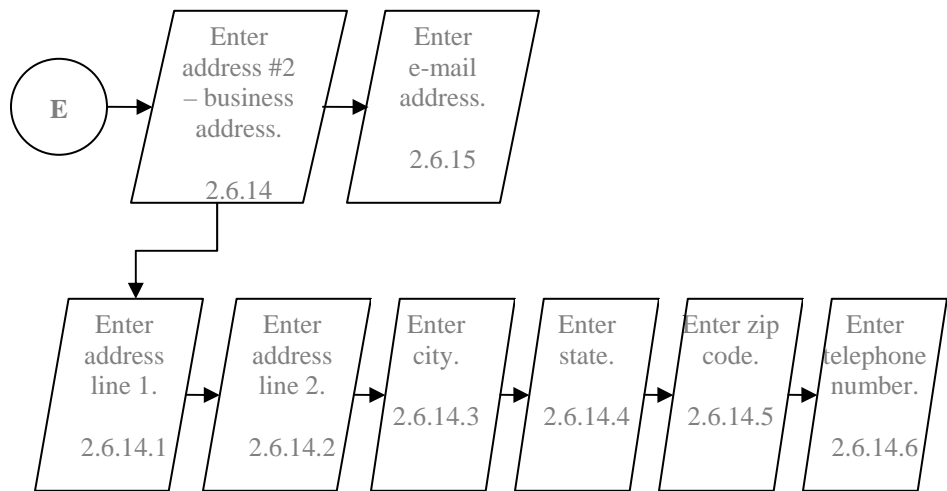
The following flowchart represents the instructional design for training the Wegner Center evening and weekend circulation staff to load a patron record and check out materials to Wegner Center Patrons.











Classification of Learning Outcomes

The instructional goal may be classified into two learning domains – cognitive domain and motor skill domain. Throughout the instructional process there are decision steps, knowledge skills, and memory skills that will require the evening and weekend circulation staff to use their intellectual skills and cognitive strategies. Examples of some of the steps that reside in the cognitive domain include:

- determine if the patron has a Wegner Center library card,
- determine record type,
- determine distance patron status,
- obtain and memorize system password, and
- knowledge of bar code locations on Wegner Center materials.

Throughout the instructional process there are scanning and data entry steps that require the evening and weekend circulation staff to use manual exertion and physical skills. Examples of some of the steps that reside in the motor skill domain include:

- scanning barcode on Wegner Center library card,
- scanning barcode on Wegner Center materials,
- desensitizing Wegner Center materials, and
- placing return slip in Wegner Center materials.

Analysis of Learners and Contexts

Introduction

An analysis of needs and goals and a task analysis have been conducted resulting in the following revised articulated and prioritized instructional goal:

The Wegner Center evening and weekend circulation staff will be able to proficiently and efficiently check out materials to Wegner Center patrons and load a patron record.

During the analysis of needs and goals step of the instructional design process, interviews were held with the evening and weekend circulation staff, the circulation manager, and the full time circulation staff. Information concerning the learners' general characteristics, entry level skills, learner learning style, the learning environment, and the performance environment were gathered at that time. In order to gather additional information needed for the analysis of learners and contexts, follow-up discussions were held with three of the seven evening and weekend circulation staff and the circulation manager. Several hours of observation at the Wegner Center circulation desk, during the day and evening, have also occurred during the preparation of the analysis of learners and contexts.

The following analysis of learners and contexts will:

- identify learner characteristics,
- identify learner entry level skills,
- identify learner learning styles,
- analyze the learning environment, and
- analyze the performance environment.

Learners' General Characteristics

Entry behaviors – The task analysis identified six entry behaviors for the Wegner Center's evening and weekend circulation staff to have mastered prior to instruction in checking out materials to Wegner Center patrons and loading patron records. They are:

- Basic computer skills, keyboarding skills, and computer operations ability.
 - All of the Wegner Center staff must pass a basic computer skills, keyboarding skills, and computer operations ability exam prior to being employed.
 - While all of the evening and weekend circulation staff have passed the exam, a couple are still computer novices and uncomfortable with computers and technology. This will be acknowledged during the instruction.
- Basic barcode scanner skills.
- Knowledge of barcode locations on Wegner Center materials.
- Basic printed material desensitizer skills.
- Basic audio/visual material desensitizer skills.

- All Wegner Center staff are required to assist with checking in returned materials and shelving returned materials. The first skill obtained by new Wegner Center staff is the ability to scan barcodes on Wegner Center materials to check them in, resensitize and desensitize materials, and return them to their proper location on the shelves.
- Have obtained and memorized system password.
 - All Wegner Center staff are given a system password at the beginning of their employment. While the evening and weekend circulation staff may not have extensively used their system password, they should have it memorized. If not, their passwords, on record in the Wegner Center administrative office, will be available for them to have and memorize the day of instruction.

Prior knowledge of topic area – The Wegner Center’s evening and weekend circulation staff currently consists of seven individuals. Four of the evening and weekend circulation staff have previously received instruction from the circulation manager and the full time circulation staff in checking out materials to Wegner Center patrons and loading patron records. However, the instruction was not effective and has resulted in a growing frustration among the evening and weekend circulation staff, the circulation manager, and the full time circulation staff. Three of the evening and weekend circulation staff have not received instruction in checking out materials to Wegner Center patrons and loading patron records. All of the evening and weekend circulation staff have been observed assisting with checking out materials to Wegner Center patrons and assisting or at least observing the circulation manager or full time circulation staff load patron records.

Attitudes toward content – The Wegner Center’s seven evening and weekend circulation staff, in a previous interview, have all expressed a desire to master the PALS system and to be proficient and efficient in using the PALS system when working the circulation desk. They have also expressed a discomfort with the PALS system because it is not Windows based and requires the use of a DOS/alpha numeric based command system. In follow up discussions with three of evening and weekend circulation staff, the inadequacy of the previous instruction and lack of follow up support and mentoring by the circulation manager and the full time circulation staff has created a great sense of frustration – both with the PALS system and with the circulation manager and the full time circulation staff.

Attitudes toward potential delivery system – The Wegner Center’s seven evening and weekend circulation staff, in a previous interview, have all expressed the need for hands on instruction – concrete sequential. They also expressed a need for “handouts” or quick guides to use at the circulation desk. In follow up discussions with three of evening and weekend circulation staff, the need for group instruction rather than individual instruction was also expressed. This would allow the evening and weekend circulation staff to all “hear the same thing

at the same time.” The individual instruction provided by the circulation manager and full time circulation staff varied greatly in content and method from one instructional session to the next. The inconsistency of the instructional content and method of instruction has added to the frustration experienced by the evening and weekend circulation staff. During observations at the circulation desk it was apparent that the evening and weekend circulation staff have developed a strong peer support system. A consistent, unified, and standardized instructional design will provide a base for expanded peer support and the possibility of peer-to-peer instruction in the future.

Motivation for instruction (ARCS) – The Wegner Center evening and weekend circulation staff are highly motivated to become proficient and efficient at working the circulation desk and providing exceptional service to Wegner Center patrons. The evening and weekend circulation staff, in previous interviews, have all expressed a desire to learn the PALS system.

- Attention – the evening and weekend circulation staff have all expressed their interest in the PALS system and their eagerness to master the PALS system.
- Relevance – the evening and weekend circulation staff perceive their need to know the PALS system in order to deliver proficient and efficient patron service.
- Confidence – the evening and weekend circulation staff have all expressed their confidence in mastering the PALS system with the proper instruction and support.
- Satisfaction – the evening and weekend circulation staff mastering of the PALS system will lead to a great sense of accomplishment and satisfaction.

The instructional designer and the circulation manager believe that the evening and weekend circulation staff’s dedication to the mission of the Wegner Center (see attitudes toward training organization) drives their motivation and is obvious through observing the evening and weekend circulation staff at work.

Educational and ability levels – The Wegner Center evening and weekend circulation staff represents a variety of educational levels: two are family practice physicians; two are physician’s wives with experience in the healthcare field; two are registered nurses; one is a nursing professor; one is a pharmacist. All of the evening and weekend circulation staff have undergraduate degrees, two of the seven hold master degrees, and four of the seven hold doctoral degrees. They all have knowledge of and experience in the health and medical field. They are all currently involved in continuing education – either as a student or an instructor. They all have mastered the basic entry behaviors identified above, while several have more advanced computer skills.

General learning preferences – The Wegner Center evening and weekend circulation staff, in previous interviews, expressed the desire for group instruction. Their desire for group instruction is a reaction to their frustration with

the previous individual instruction provided by the circulation manager and full time circulation staff. The evening and weekend circulation staff stressed the need for the introductory PALS instruction – checking out materials to Wegner Center patrons and loading patron records – to be group instruction. Additional instruction in PALS components – renewing materials, displaying patron records, removing a patron hold, etc. – could be delivered either through individual instruction, online instruction, or small group instruction. Because of the educational level of the evening and weekend circulation staff a variety of instructional delivery methods could be utilized.

Attitudes toward training organization – The Wegner Center evening and weekend circulation staff – both paid employees and volunteers - have a supportive and devoted attitude toward the Wegner Center. They are dedicated to the mission of the Wegner Center – “to provide the people of South Dakota and the surrounding region quality health science information for health care practice, education, and research.” The evening and weekend circulation staff, retired physicians, nurses, and other allied healthcare professionals, work at the Wegner Center because of their belief in its mission, their desire to assist patrons find the medical and health information they need, and the volunteer spirit. The instructional designer and the circulation manager believe that the evening and weekend circulation staff dedication to the mission of the Wegner Center drives their motivation and is reinforced by observation. As the circulation manager said, “they don’t work here for the money.”

General group characteristics – The Wegner Center evening and weekend circulation staff are a very homogeneous group. Their similarities:

- They are all retired.
- They are all college educated.
- They are all upper middle-class.
- They all have backgrounds and/or careers in the medical or health field.
- They all have and use home computers.
- They are all long time South Dakota residents.
- They all remain in South Dakota during the winter rather than moving to warmer climates like other retirees.
- They are all self-reliant, mobile, and still in good health.
- They all wear corrective eyewear.
- They are all white.

Their differences:

- Three are married, two are widowed, and two are single.
- Four are women, three are men.
- Four have children, three do not.
- Three have grandchildren, four do not.
- Five are paid employees, two are volunteers.

Learners' Entry Level Skills

Addressed above in the Learners' General Characteristics under entry behaviors, the Wegner Center evening and weekend circulation staff have mastered the six entry behaviors identified in the task analysis prior to instruction in checking out materials to Wegner Center patrons and loading patron records.

The Wegner Center evening and weekend circulation staff, being medical and healthcare professionals prior to working at the Wegner Center, bring with them additional entry-level skills that will be helpful during the instruction. These skills include:

- critical and analytical thinking skills,
- knowledge of medical and health terminology,
- experience working with concerned patients/consumers and family members,
- experience working with medical and healthcare students and professionals, and
- years of life and work experience.

Learning Styles

The Wegner Center evening and weekend circulation staff are lifelong learners. In the medical and healthcare fields, lifelong learning is actively supported by healthcare organizations and licensing associations. CME, continuing medical education, on an annual basis is required in South Dakota for physicians, nurses, and other healthcare professionals in order to maintain their state license. Because of this background in continuing education and lifelong learning, the evening and weekend circulation staff have all expressed during the previous interviews their ability to learn through a variety of delivery methods. Each of the evening and weekend circulation staff have received instruction, and have successfully learned, via the four learning styles represented by Gregore's model of mind styles. For example:

- Concrete sequential – learning to use new medical equipment or new medical techniques via demonstration; self study for board exams and licensing exams using workbooks; step-by-step modules used to present compliance, security, and insurance instruction.
- Concrete random – patient simulations in experiential labs and via computer assisted instruction; computerized instructional games such as EKGQuiz, Emergency Responder, and Aortic Balloons; gross anatomy and pathology courses.
- Abstract sequential – didactic classes and lectures; workshops, seminars, and conferences; mortality and morbidity debriefings; chart reviews.
- Abstract random – grand rounds; medical and health consultations; interactive diagnostic and interdisciplinary conferences.

As previously stated in the general learning preferences under Learners' General Characteristics above, the Wegner Center evening and weekend circulation staff, in previous interviews, expressed the desire for group instruction. They also expressed their desire for instruction that is hands on (concrete sequential), that is presented in a step-by-step process (abstract sequential) and that provides following up handouts and quick guides (concrete random).

Learning Environment

Number/nature of sites – The instruction will be held in one site, the computer classroom at the Wegner Center. The computer classroom is an eighteen station computer classroom with an instructor station attached to an LCD projector. Each of the computers used by the evening and weekend circulation staff during the instruction will be configured identical to the circulation desk computer. PALS will also be configured identically to the PALS configuration on the circulation desk computer. Each will be equipped with a handheld scanner identical to the handheld scanner at the circulation desk.

Site compatibility with instructional needs – The Wegner Center computer classroom is compatible with the instructional needs. The computer classroom allows for group and hands on instruction – two aspects that are essential to the instruction. The ability to replicate the configuration of the circulation computer and PALS on seven computers, the ability to provide seven handheld scanners, and the ability to project the process of checking out materials to Wegner Center patrons and loading patron records via the LCD projector for all to see makes the computer classroom an excellent place for instruction.

Site compatibility with learner needs – The Wegner Center computer classroom is compatible with the learner needs. The computer classroom allows for group and hands on instruction – needs that were expressed in interviews by the evening and weekend circulation staff. The computer classroom provides a private environment, unlike the previous instruction providing by the circulation manager and the full time circulation staff in the public environment of the circulation desk. The computer classroom allows for one-on-one support as well as group interaction.

Feasibility for simulating workplace – The ability to replicate the configuration of the Wegner Center circulation desk computer and PALS on the computers in the classroom and the ability to provide each evening and weekend circulation staff with a handheld scanner closely replicates the workplace. What will be missing in the computer classroom is hustle and bustle that occurs at the circulation desk while the evening and weekend circulation staff are checking out materials to Wegner Center patrons and loading patron records. However, the computer classroom is adjacent to the circulation desk which will easily allow for small group simulations at the circulation desk to be included in the instruction.

Performance Environment

Managerial/supervisory support – Interviews with the Wegner Center circulation manager and full time circulation staff prior to the task analysis and discussions with the circulation manager after the task analysis resulted in:

- the circulation manager realizing that the circulation desk was an inappropriate place for providing instruction to the evening and weekend circulation staff,
- the circulation manager realizing that there are more steps to the process of loading a patron record than she was providing during her instruction of the evening and weekend circulation staff,
- the circulation manager realizing that the evening and weekend circulation staff needed simplified quick guides available at the circulation desk rather than full, in-depth PALS manuals,
- the circulation manager realizing that the evening and weekend circulation staff need follow-up support after instruction, and
- the circulation manager realizing that the instruction provided to evening and weekend circulation staff needed to be constant in instructional content and instructional method.

The circulation manager is committed to providing the instruction and follow-up support that the evening and weekend circulation staff need to proficiently and efficiently check out materials to Wegner Center patrons and load a patron records.

Physical aspects of site – The Wegner Center circulation desk is the center for patron services. Not only do patrons check out materials from and return materials to the circulation desk, the circulation desk also collects money for photocopies, reserves study rooms and equipment, maintains reserve materials, and provides receptionist services – answers phones, provides directions, etc. The circulation desk is equipped with two computers, identically configured – with PALS, handheld scanners, and a networked printer. The circulation desk has drawers for Wegner Center forms, library cards, and other supplies. The circulation desk has a view of the staff, faculty, student, and public computers, the main library entrance, and the stairs leading to the second floor.

Social aspects of site – The Wegner Center circulation desk is supervised during the day by the circulation manager or full time circulation staff on duty. During the evening and on weekends, the circulation staff is loosely supervised by the reference librarian on call. The on call reference librarian is not at the Wegner Center but is available by phone if needed by the evening and weekend circulation staff. On occasion the circulation manager, full time circulation staff, or reference librarian are present at the Wegner Center during the evenings and weekends. The evening and weekend circulation staff interact with other library employees during shift changes, with each other, with work-study students (whom they supervise), and with patrons.

Relevance of skills to workplace – The skills, both entry behaviors and additional skills, that the Wegner Center evening and weekend circulation staff bring to the workplace meet the needs of the instructional goal and task analysis. The entry behaviors of basic computer skills, keyboarding skills, and computer operation skills are skills they will use during the instruction. But these are also skills they will use when assisting patrons with literature searches, using Office products, or surfing the web. The additional skills of critical and analytical thinking, medical and health knowledge, and experience will be used in all their interactions with patrons – not only while checking out materials or loading patron records. The skills will be relevant now and in the future.

Performance Objectives

Performance Objectives

Two terminal objectives have been written for the instructional goal based on the following revised, articulated, and prioritized instructional goal:

The Wegner Center evening and weekend circulation staff will be able to proficiently and efficiently check out materials to Wegner Center patrons and load a patron record.

The two processes in the instructional goal may be completed independently of the other.

Terminal Objective #1:

The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to check out materials to Wegner Center patrons with 100% accuracy within five minutes.

Terminal Objective #1 Components:

Audience – the Wegner Center evening and weekend circulation staff

Behavior – will be able to check out materials to Wegner Center patrons

Condition – while working the circulation desk

Degree – with 100% accuracy within five minutes

Terminal Objective #2:

The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to load a patron record with 100% accuracy within ten minutes.

Terminal Objective #2 Components:

Audience – the Wegner Center evening and weekend circulation staff

Behavior – will be able to load a patron record

Condition – while working the circulation desk

Degree – with 100% accuracy within ten minutes

Enabling objectives, the prerequisites for the terminal objective, relate directly to the tasks analysis conducted previously. The tasks identified in the tasks analysis include decision functions, process functions, and input functions. Unique enabling objectives have been written for the decision functions and process functions. A single enabling objective has been written for the multiple, similar input functions – i.e. enter, key, and scan. For this section the objective components will be signified by [A] for audience, [B] for behavior, [C] for condition, and [D] for degree.

Decision functions:

1.1 Determine if the patron has a Wegner Center library card.

Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will ask the Wegner Center patron for their Wegner Center Library Card to begin the patron circulation transaction [B] each time a Wegner Center patron approaches the circulation desk to check out materials.

2.6.1 Determine record type.

Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will determine the record type from information on the Wegner Center library card request form or by asking the Wegner Center patron if they are a student or faculty [B] each time a new patron record is loaded [D].

2.6.4 Determine if patron will be using their social security number.

Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will determine if the Wegner Center patron will be using their social security number from information on the Wegner Center library card request form or by asking the Wegner Center patron if they wish to use their social security number [B] each time a new patron record is loaded [D].

2.6.11 Determine distance patron status.

Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will determine if the Wegner Center patron is a Sioux Falls resident from information on the Wegner Center library card request form or by asking the Wegner Center patron [B] each time a new patron record is loaded [D].

2.6.12 Determine if patron is a minor.

Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will determine if the Wegner Center patron is a minor from information on the Wegner Center library card request form or by asking the Wegner Center patron if they are eighteen [B] each time a new patron record is loaded [D].

Process functions:

1.2 Obtain materials to be checked out from patron

Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will obtain materials to be checked out from Wegner Center patrons after determining if they have a Wegner Center library card [B] each time a Wegner Center patron approaches the circulation desk to check out materials [D].

1.3 and 2.1 Activate PALS system on circulation computer.

Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will activate PALS on the circulation computer [B] each time a patron circulation transaction is began [D].

- 1.7 *Write the due date displayed in PALS on a Wegner Center return slip.*
Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will write the due date displayed in Pals on a Wegner Center return slip [B] each time materials are checked out to a Wegner Center patron [D].
- 1.8 *Place return slip in Wegner Center materials.*
Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will place the Wegner Center return slip in the Wegner Center materials [B] each time materials are checked out to a Wegner Center patron [D].
- 1.9 *Desensitize each of the Wegner Center materials being checkout by running them through the appropriate desensitizer.*
Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will desensitize print materials using the print materials desensitizer [B] each time print materials are checked out to a Wegner Center patron [D].
Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will desensitize audio/visual materials using the audio/visual materials desensitizer [B] each time audio/visual materials are checked out to a Wegner Center patron [D].
- 1.10 *Tell Wegner Center patrons when materials are due.*
Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will tell the Wegner Center patron when materials are due [B] each time materials are checked out to a Wegner Center patron [D].
- 1.11 *Return Wegner Center library card and checked out materials to patron.*
Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will return to the Wegner Center library card and checked out materials to the patron to end the patron circulation transaction [B] each time materials are checked out to a Wegner Center patron [D].
- 2.1 *Have patron fill out a Wegner Center library card request form.*
Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will give the Wegner Center patron a library card request form and a pen and have them fill out the form [B] each time a patron requests a Wegner Center library card [D].
- 2.3 *Obtain Wegner Center library card from drawer at circulation desk.*
Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will obtain a Wegner Center library card from the drawer at the circulation desk [B] each time a patron requests a Wegner Center library card [D].

Input functions:

For tasks that require the Wegner Center library and weekend staff to enter information into PALS.

Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will enter the information required at the PALS prompt on the circulation desk computer [B] with 100% accuracy [D].

For tasks that require the Wegner Center library and weekend staff to key information into PALS.

Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will key the information required at the PALS prompt on the circulation desk computer [B] with 100% accuracy [D].

For tasks that require the Wegner Center library and weekend staff to scan information into PALS.

Enabling objective: The Wegner Center evening and weekend circulation staff [A], while working the circulation desk [C], will scan the information required at the PALS prompt on the circulation desk computer [B] with 100% accuracy [D].

Performance objectives for entry level behaviors do not need to be written because all Wegner Center staff must pass a basic computer skills, keyboarding skills, and computer operations ability exam prior to being employed.

Performance Measurement

Assessment of Participants Learning

The ability of the Wegner Center evening and weekend circulation staff to proficiently and efficiently check out materials to Wegner Center patrons and load a patron record will be assessed prior to instruction (pretest), during instruction (embedded test), and following instruction (posttest).

Pretest

The pretest will not be used to assess entry level behaviors because all Wegner Center staff must pass a basic computer skills, keyboarding skill, and computer operations ability exam prior to being employed. The pretest will be used as an instruction development tool, to test skills that will be taught in the instruction. Four of the Wegner Center evening and weekend circulation staff have received previous instruction from the circulation manager and the full time circulation staff in checking out materials to Wegner Center patrons and in loading patron records. However, as has been previously stated in the analysis of needs and goals, the instruction did not achieve the desired results – the ability of the Wegner Center evening and weekend staff to proficiently and efficiently check out materials to Wegner Center patrons and load a patron record. The four Wegner Center evening and weekend circulation staff having previously received instruction will serve as the pretest group. Administering a pretest to this group will:

- identify decision functions that present challenges,
- identify process functions that present challenges, and
- identify input functions that present challenges.

By administering the pretest to the four Wegner Center evening and weekend staff who have received previous training, the functions that continue to be challenging can be identified. The instructional strategies and instructional materials to be developed can focus on the challenges identified by the pretest.

The pretest, since it is evaluating the performance of the four Wegner Center evening and weekend staff as they check out materials to Wegner Center patrons and load patron records, will consist of a yes/no/not applicable checklist that the instructional designer will use while observing the Wegner Center evening and weekend circulation staff at the circulation desk.

Embedded test

The Wegner Center evening and weekend circulation staff will be evaluated at the end of the instruction day. Although the evaluation is occurring at the end of instruction it is not a posttest. The posttest will be administered at the place of performance, the circulation desk. The embedded test will occur in the Wegner Center computer classroom. The embedded test will consist of three “live action” scenarios which will evaluate the Wegner Center evening and weekend circulation staff:

- checking out materials to a Wegner Center patron,
- loading a patron record, and
- loading a patron record and checking out materials to a Wegner Center patron.

Students from the University of South Dakota School of Medicine, the primary users of the Wegner Center, will be recruited to serve as Wegner Center patrons for the scenarios.

The embedded test, since it is evaluating the performance of the Wegner Center evening and weekend staff as they check out materials to Wegner Center patrons and load patron records during the “live action” scenarios, will consist of the same yes/no/not applicable checklist used for the pretest. The instructor will use the checklist while observing the Wegner Center evening and weekend staff during the scenarios.

Posttest

The posttest will occur within two weeks of the instruction. The seven Wegner Center evening and weekend circulation staff will be evaluated at the circulation desk during their regular shift. The posttest will evaluate the Wegner Center evening and weekend circulate staff:

- checking out materials to a Wegner Center patron,
- loading a patron record, and
- loading a patron record and checking out materials to a Wegner Center patron.

The posttest, since it is evaluating the performance of the Wegner Center evening and weekend staff as they check out materials to Wegner Center patrons and load patron records while at the circulation desk during their regular shift, will consist of the same yes/no/not applicable checklist used for the pretest and embedded test. The circulation manager or full time circulation staff will use the checklist while observing the Wegner Center evening and weekend staff at the circulation desk.

Congruence of Objective and Test

The performance items for the checklist used for the pretest, embedded test, and posttest will directly correspond to the enabling objectives previously developed. The successful completion of the performance items on the checklist by the Wegner Center evening and weekend staff will fulfill the two terminal objectives:

- Terminal Objective #1: The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to check out materials to Wegner Center patrons with 100% accuracy within five minutes.
- Terminal Objective #2: The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to load a patron record with 100% accuracy within ten minutes.

The following list of functions and enabling objectives that have previously developed will have the checklist item added to them to show the congruence between the objective and the evaluation/test item. The evaluation/test item will be added to the checklist in the order they should be accomplished by the Wegner Center evening and weekend staff when they are at the circulation desk. The order will be taken from the task analysis previously developed.

Decision functions:

1.1 Determine if the patron has a Wegner Center library card.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will ask the Wegner Center patron for their Wegner Center Library Card to begin the patron circulation transaction each time a Wegner Center patron approaches the circulation desk to check out materials.

Checklist/test item: Asks patron for library card.

2.6.1 Determine record type and enter.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will determine the record type from information on the Wegner Center library card request form or by asking the Wegner Center patron if they are a student or faculty each time a new patron record is loaded.

Checklist/test item: Determines record type.

2.6.4 Determine if patron will be using their SSN and enter.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will determine if the Wegner Center patron will be using their social security number from information on the Wegner Center library card request form or by asking the Wegner Center patron if they wish to use their social security number each time a new patron record is loaded.

Checklist/test item: Determines patron use of social security number.

2.6.11 Determine distance patron status and enter.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will determine if the Wegner Center patron is a Sioux Falls resident from information on the Wegner Center library card request form or by asking the Wegner Center patron each time a new patron record is loaded.

Checklist/test item: Determines patron residency.

2.6.12 Determine if patron is a minor and enter.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will determine if the Wegner Center patron is a minor from information on the Wegner Center library card request form or by asking the Wegner Center patron if they are eighteen each time a new patron record is loaded.

Checklist/test item: Determines patron age.

Process functions:

1.2 Obtain materials to be checked out from patron

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will obtain materials to be checked out from Wegner Center patrons after determining if they have a Wegner Center library card each time a Wegner Center patron approaches the circulation desk to check out materials.

Checklist/test item: Obtains materials from patron.

1.3 and 2.1 Activate PALS system on circulation computer.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will activate PALS on the circulation computer each time a patron circulation transaction is began.

Checklist/test item: Activates PALS.

1.7 Write the due date displayed in PALS on a Wegner Center return slip.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will write the due date displayed in Pals on a Wegner Center return slip each time materials are checked out to a Wegner Center patron.

Checklist/test item: Writes due date on return slip.

1.8 Place return slip in Wegner Center materials.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will place the Wegner Center return slip in the Wegner Center materials each time materials are checked out to a Wegner Center patron.

Checklist/test item: Places return slip in materials.

1.9 Desensitize each of the Wegner Center materials being checkout by running them through the appropriate desensitizer.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will desensitize print materials using the print materials desensitizer each time print materials are checked out to a Wegner Center patron.

Checklist/test item: Desensitizes books.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will desensitize audio/visual materials using the audio/visual materials desensitizer each time audio/visual materials are checked out to a Wegner Center patron.

Checklist/test item: Desensitizes AV materials.

1.10 Tell Wegner Center patrons when materials are due.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will tell the Wegner Center patron when materials are due each time materials are checked out to a Wegner Center patron.

Checklist/test item: Tells patron due date.

1.11 Return Wegner Center library card and checked out materials to patron.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will return to the Wegner Center library card and checked out materials to the patron to end the patron circulation transaction each time materials are checked out to a Wegner Center patron.

Checklist/test item: Returns library card to patron.

Checklist/test item: Returns materials to patron.

2.1 Have patron fill out a Wegner Center library card request form.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will give the Wegner Center patron a library card request form and a pen and have them fill out the form each time a patron requests a Wegner Center library card.

Checklist/test item: Gives patron library card request form.

Checklist/test item: Gives patron pen.

2.3 Obtain Wegner Center library card from drawer at circulation desk.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will obtain a Wegner Center library card from the drawer at the circulation desk each time a patron requests a Wegner Center library card.

Checklist/test item: Obtains library card from drawer.

Input functions:

For tasks that require the Wegner Center library and weekend staff to enter information into PALS.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will enter the information required at the PALS prompt on the circulation desk computer with 100% accuracy.

Checklist/test item: Enters _____ (blank will be completed for each input that requires the Wegner Center evening and weekend circulation staff to enter data).

For tasks that require the Wegner Center library and weekend staff to key information into PALS.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will key the information required at the PALS prompt on the circulation desk computer with 100% accuracy.

Checklist/test item: Keys _____ (blank will be completed for each input that requires the Wegner Center evening and weekend circulation staff to key data).

For tasks that require the Wegner Center library and weekend staff to scan information into PALS.

Enabling objective: The Wegner Center evening and weekend circulation staff while working the circulation desk will scan the information required at the PALS prompt on the circulation desk computer with 100% accuracy.

Checklist/test item: Scans _____ (blank will be completed for each input that requires the Wegner Center evening and weekend circulation staff to scan data).

Criterion-Referenced Test

For the instruction that is being prepared to train the Wegner Center evening and weekend circulation staff to proficiently and efficiently check out materials to Wegner Center patrons and load a patron record, a single checklist will serve as the pretest, embedded test, and posttest. The checklist items are paraphrases of the enabling objectives. The checklist items are paraphrased such that a yes response reflects a positive outcome.

Wegner Center Circulation Desk Performance Checklist				
Checking out materials to Wegner Center patrons				Staff member: <hr/> Date: <hr/> Time: <hr/> Evaluator: <hr/> Comments:
Asks patron for library card	Yes	No	NA	
Obtains materials from patron	Yes	No	NA	
Activates PALS	Yes	No	NA	
Scans library card	Yes	No	NA	
Scans materials	Yes	No	NA	
Keys to proceed command and enters	Yes	No	NA	
Writes due date on return slip	Yes	No	NA	
Places return slip in materials	Yes	No	NA	
Desensitizes books	Yes	No	NA	
Desensitizes AV materials	Yes	No	NA	
Tells patron due date	Yes	No	NA	
Returns library card to patron	Yes	No	NA	
Returns materials to patron	Yes	No	NA	
Loading patron record				
Gives patron library card request form and pen	Yes	No	NA	
Activates PALS	Yes	No	NA	
Obtains library card from drawer	Yes	No	NA	
Enters load patron record code "LPR"	Yes	No	NA	
Enters system password	Yes	No	NA	
Determines patron type and enters	Yes	No	NA	
Scans barcode from library card	Yes	No	NA	
Enters patron registration ID	Yes	No	NA	
Determines patron use of SSN and enters	Yes	No	NA	
Enters patron's name (last, first, MI)	Yes	No	NA	
Enters patron's circ class	Yes	No	NA	
Enters expiration date	Yes	No	NA	
Enters address to use	Yes	No	NA	
Determines patron residency and enters	Yes	No	NA	
Determines patron's age and enters	Yes	No	NA	
Enters home address and telephone number	Yes	No	NA	
Enters business address and telephone number	Yes	No	NA	
Enters e-mail address	Yes	No	NA	
Keys to proceed command and enters	Yes	No	NA	
Gives library card to patron	Yes	No	NA	

Assessment of the Overall Instruction

The Wegner Center is mandated by the University of South Dakota School of Medicine and the Office of Continuing Medical Education to use a standardized evaluation form for all formal instruction. That includes instruction of students, faculty, staff, and/or consumers.

The first five questions on the mandated evaluation form deal with the instructor – were they prepared, were they appropriate for topic, were they knowledgeable, were they organized, and were they effective. The next two questions on the mandated evaluation form deal with teaching methods and aids – were they appropriate and were they effective. The next three questions on the mandated evaluation form deal with objectives – did the content relate to the stated objectives and was each objective met. The next two questions on the mandated evaluation form deal with instructional value to learners – did it increase their knowledge and did it increase their competency. The final question on the mandated evaluation form asks if the class length was adequate for the topic.



Wegner Health Science Information Center Training Evaluation

In order to assess the quality of this program and assure that the program meets your needs and expectations please complete the following evaluation form by circling the number that best represents your assessment of this session. Please provide open, honest feedback about your participation in this session.

Date:

Class:

Instructor:

<i>Please circle the appropriate number.</i>	Poor  Excellent 				
To what extent was the instructor prepared for the training session?	1	2	3	4	5
To what extent was the instructor the appropriate choice for teaching this topic?	1	2	3	4	5
To what extent was the instructor knowledgeable in presenting his/her material?	1	2	3	4	5
To what extent was the instructor organized in presenting his/her material?	1	2	3	4	5
To what extent was the instructor effective in presenting his/her material?	1	2	3	4	5
To what extent were the teaching methods and aids appropriate?	1	2	3	4	5
To what extent were the teaching method and aids effective?	1	2	3	4	5
To what extent did the content relate to the stated objectives?	1	2	3	4	5
To what extent was each objective met?	1	2	3	4	5
To what extent was the information valuable in increasing your knowledge in this area?	1	2	3	4	5
To what extent was the information valuable in increasing your competence in this area?	1	2	3	4	5
To what extent was the class length adequate?	1	2	3	4	5

Please share any additional comments on this educational event.

Instructional Strategy

Introduction

The instructional designer will conduct the instruction. The instruction of the Wegner Center evening and weekend circulation staff will be conducted in the Wegner Center computer classroom and will be limited to two hours. The computer classroom will be prepared for the training in advance. Each of the computers used by the Wegner Center evening and weekend circulation staff during the instruction will be configured identical to the circulation desk computer. PALS will also be configured identically to the PALS configuration on the circulation desk computer. Each computer will be equipped with a handheld scanner identical to the handheld scanner at the circulation desk. A book desensitizer and an audio/visual desensitizer will also be available in the computer classroom. Because of the configuration of the Wegner Center computer classroom one of the full time circulation staff will assist from the back of the classroom by pointing out to the instructor learners having difficulties.

Pre-instructional Activities

It is a tradition at the Wegner Center and the University of South Dakota School of Medicine to provide coffee and muffins/cookies at the beginning of training sessions. The first pre-instructional activity will be Wegner Center evening and weekend circulation staff arriving, obtaining their refreshments, and chatting with each other. When the training session is officially called to order the second pre-instructional activity will be introductions. Not all of the Wegner Center evening and weekend circulation staff knows each other because of their work schedules. This will be a time for them to meet each other and tell the group about themselves.

Motivate learners – the Wegner Center evening and weekend circulation staff are already motivated to be able to proficiently and efficiently check out materials to the Wegner Center patrons and load a patron record. However additional motivation will be provided by:

- demonstrating to the learners how the circulation statistics are used by the Wegner Center in annual reports, grant requests, and fund raising projects;
- demonstrating to the learners how the circulation statistics are used by the eleven Wegner Center partners in annual reports, grant requests, and fund raising projects;
- demonstrating how patron records are used by the Wegner Center staff;
- and by demonstrating the need for accuracy when checking out materials to Wegner Center patrons and when loading a patron record.

Describe objectives – the two terminal objectives written during the development of performance objectives will be described to the Wegner Center evening and weekend circulation staff. The two terminal objectives are:

- The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to check out materials to Wegner Center patrons with 100% accuracy within five minutes.
- The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to load a patron record with 100% accuracy within ten minutes.

Describe or assess entry behaviors – entry behaviors have been previously assessed - all Wegner Center staff must pass a basic computer skills, keyboarding skills, and computer operations ability exam prior to being employed. However, the entry behaviors identified in the task analysis will be reviewed with the Wegner Center evening and weekend circulation staff during instruction. The entry behaviors to be reviewed are:

- Basic computer skills, keyboarding skills, and computer operations ability.
 - Turn on computer; log onto network; open Notepad, and activate PALS.
- Basic barcode scanner skills.
 - Test scanner by scanning several library card barcodes.
- Knowledge of barcode locations on Wegner Center materials.
 - Scan several printed materials and audio/visual materials.
- Basic printed material desensitizer skills.
 - Desensitize printed materials.
- Basic audio/visual material desensitizer skills.
 - Desensitize audio/visual materials.
- Have obtained and memorized system password.
 - Ask learners if they know their system password. Have them write it on a 3X5 card for verification with the circulation manager.

Information Presentation and Learner Participation

The instructional sequence will follow the sequence previously outlined in the task analysis. The SME and the ID agree that the more difficult of the two patron circulation transactions should be taught first. It is also the one that evening and weekend circulation staff have had the greatest difficulty with in the past. The two patron circulation transactions will be taught in the following order.

- Load a patron record (establishing a library card) for new Wegner Center patrons.
- Check out materials to Wegner Center patrons (known in PALS terminology as charging materials).

The instructional sequence for each of the terminal objectives will follow the previously outlined task analysis and flow chart. The PALS system requires that information be entered in a predefined order; therefore the instruction will follow the task analysis order – step-by-step.

Prior to the beginning of instruction the learners will be given two completed Wegner Center library card request forms, a Wegner Center library card, Wegner Center return slips, and three Wegner Center materials (two books and a video) to use during the instruction.

Instructional sequence:

Terminal Objective: The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to load a patron record with 100% accuracy within ten minutes.	
Cluster One	<p><u>Content:</u></p> <ol style="list-style-type: none">2. Load a patron record (establishing a library card) for new Wegner Center patrons.<ol style="list-style-type: none">2.1. Have patron fill out a Wegner Center library card request form.2.2. Activate PALS system on circulation computer.<ol style="list-style-type: none">2.2.1. Basic computer skills, keyboarding skills, and computer operations ability.*2.3. Obtain Wegner Center library card from drawer at circulation desk. <p>Cluster one consists of activities that need to be completed by the learners to begin the process of loading a patron record. These activities are completed prior to the entry of any information into the PALS system. The instructor will discuss the Wegner Center library card request form and its information fields, stressing the most important components of the Wegner Center library card request form and the types of information that are appropriate for each information field. The instructor will discuss how to activate PALS and steps to take when PALS will not activate.</p> <p><u>Examples:</u> Discussion of the Wegner Center library card request form; activation of PALS; and discussion of the Wegner Center library card.</p> <p><u>Practice:</u> The learners will activate the PALS system on their computers.</p>
Cluster Two	<p><u>Content:</u></p> <ol style="list-style-type: none">2.4. Type “LPR” at the PALS prompt and press enter.2.5. Type system password when prompted and press enter.<ol style="list-style-type: none">2.5.1. Have obtained and memorized system password.* <p>Cluster two consists of activities that need to be completed by the learners prior to the entry of the patron information into the PALS system from the Wegner Center library card request form. The instructor will discuss the purpose and definition of “LPR” and the purpose and use of the system password.</p> <p><u>Examples:</u> Enter “LPR” and system password into PALS system.</p> <p><u>Practice:</u> The learners will enter “LPR” and system password into PALS system on their computers.</p>

<p>Cluster Three</p>	<p><u>Content:</u></p> <p>2.6. Enter information into the required fields in PALS in the order set by the PALS workform. The information to be entered is from the Wegner Center library card request form completed by patron and from PALS dropdown menus for Wegner Center specific information.</p> <p>2.6.1. Determine record type.</p> <p>2.6.1.1. Enter “L” for local.</p> <p>2.6.1.2. Enter “S” for student.</p> <p>2.6.1.3. Enter “F” for faculty.</p> <p>2.6.2. Scan patron barcode ID from back of Wegner Center library card.</p> <p>2.6.3. Enter patron registration ID – the last nine numbers of the patron barcode ID.</p> <p>2.6.4. Determine if patron will be using their social security number.</p> <p>2.6.4.1. If yes, enter patron’s social security number.</p> <p>2.6.4.2. If no, enter generated ID – date (mm/dd/yy) + last three digits of library card bar code.</p> <p>Cluster three consists of activities that require the learner to enter Wegner Center information and patron information from the Wegner Center library request form into the PALS system. The instructor will discuss the purpose and determination of “L”, “S”, and “F”. The instructor will discuss the purpose and reason for the patron registration ID and discuss the use or nonuse of the patron’s social security number.</p> <p><u>Examples:</u> <i>(For the instructional session the instructor will use an imaginary patron, Sabina K. Crandell, who is requesting a Wegner Center library card. The information on one of the completed Wegner Center library card request forms given to the learners prior to the start of instruction will contain Sabina’s information. Throughout the session the instructor and the learners will enter the information for Sabina’s Wegner Center library card request form into the PALS system.)</i></p> <p>Determine and enter record type; scan Wegner Center library card; enter patron registration ID; and determine the use or nonuse of the patron’s social security number and enter appropriate information into the PALS system.</p> <p><u>Practice:</u> The learners will determine and enter record type; scan Wegner Center library card; enter patron registration ID; and determine the use or nonuse of the patron’s social security number and enter appropriate information into the PALS system on their computers.</p>
	<p>Cluster Four</p>

	<p>2.6.5. Enter patron’s last name from the Wegner Center library card request form.</p> <p>2.6.6. Enter patron’s first name from the Wegner Center library card request form.</p> <p>2.6.7. Enter patron’s middle initial from the Wegner Center library card request form.</p> <p>Cluster four consists of activities that require the learner to enter patron information from the Wegner Center library request form into the PALS system. The instructor will discuss entering the patron’s name into the PALS system.</p> <p><u>Examples:</u> Enter patron’s last name, first name, and middle initial into the PALS system.</p> <p><u>Practice:</u> The learners will enter patron’s last name, first name, and middle initial into the PALS system on their computers.</p>
<p>Cluster Five</p>	<p><u>Content:</u></p> <p>2.6.8. Enter patron circ class from the Wegner Center library card request form.</p> <p>2.6.9. Enter expiration date – two years from the date the library card is being issued.</p> <p>2.6.10. Enter address to use – always enter “1.”</p> <p>2.6.11. Determine distance patron status.</p> <p>2.6.11.1. Enter yes if not a Sioux Falls resident</p> <p>2.6.11.2. Enter no if a Sioux Falls resident.</p> <p>2.6.12. Determine if patron is a minor.</p> <p>2.6.12.1. If yes, enter guardian name from the Wegner Center library card request form.</p> <p>2.6.12.2. If no, proceed to next step.</p> <p>Cluster five consists of activities that require the learner to enter Wegner Center information and patron information from the Wegner Center library request form into the PALS system. The instructor will discuss the purpose and determination of patron circ class. The instructor will discuss the purpose of the expiration date, discuss the purpose for address to use, discuss the purpose for patron status, and discuss the purpose and reason for determination of patron’s age.</p> <p><u>Examples:</u> Enter patron circ class; enter expiration date; enter address to use; determine and enter patron status; and determine and enter patron’s age into the PALS system.</p> <p><u>Practice:</u> The learners will enter patron circ class; enter expiration date; enter address to use; determine and enter patron status; and determine and enter patron’s age into the PALS system on their computers.</p>

<p style="text-align: center;">Cluster Six</p>	<p><u>Content:</u></p> <ul style="list-style-type: none"> 2.6.13. Enter address #1 – home address from the Wegner Center library card request form. <ul style="list-style-type: none"> 2.6.13.1. Enter address line 1. 2.6.13.2. Enter address line 2 if needed. 2.6.13.3. Enter city. 2.6.13.4. Enter state. 2.6.13.5. Enter zip code. 2.6.13.6. Enter telephone number. 2.6.14. Enter address #2 – business address from the Wegner Center library card request form if applicable. <ul style="list-style-type: none"> 2.6.14.1. Enter address line 1. 2.6.14.2. Enter address line 2 if needed 2.6.14.3. Enter city. 2.6.14.4. Enter state. 2.6.14.5. Enter zip code 2.6.14.6. Enter telephone number. 2.6.15. Enter e-mail address from the Wegner Center library card request form. <p>Cluster six consists of activities that require the learner to enter patron information from the Wegner Center library request form into the PALS system. The instructor will discuss entering the patron’s home address, entering the patron’s business address, and entering the patron’s e-mail address.</p> <p><u>Examples:</u> Enter the patron’s home address; enter the patron’s business address; and enter the patron’s e-mail address into the PALS system.</p> <p><u>Practice:</u> The learners will enter the patron’s home address; enter the patron’s business address; and enter the patron’s e-mail address into the PALS system on their computers.</p>
<p style="text-align: center;">Cluster Seven</p>	<p><u>Content:</u></p> <ul style="list-style-type: none"> 2.7. Key down to the proceed command and press enter. 2.8. Give Wegner Center library card to patron. <p>Cluster seven consists of activities that need to be completed by the learners to finish the process of loading a patron record. The instructor will discuss keying down to proceed and entering. The instructor will discuss what appears on the PALS display after the successful loading of a patron record.</p> <p><u>Examples:</u> Key down to proceed and enter in the PALS system. Check the PALS display for the successful loading of a patron record.</p> <p><u>Practice:</u> The learners will key down to proceed and enter in the PALS</p>

	system on their computers. The learners will check the PALS display for the successful loading of a patron record.
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Terminal Objective: The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to check out materials to Wegner Center patrons with 100% accuracy within five minutes.	
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Cluster One	<p><u>Content:</u></p> <ol style="list-style-type: none"> 1. Check out materials to Wegner Center patrons (known in PALS terminology as charging materials). <ol style="list-style-type: none"> 1.1. Determine if the patron has a Wegner Center library card. <ol style="list-style-type: none"> 1.1.1. If yes, proceed to 1.2. 1.1.2. If no, proceed to step 2.1. 1.2. Obtain materials to be checked out from patron. <p>Cluster one consists of activities that need to be completed by the learners to begin the process of checking out materials to Wegner Center patrons. The instructor will discuss determining if the patron has a Wegner Center library card and how to proceed if when they do or don't. The instructor will discuss quality patron service and how to obtain materials from patrons.</p> <p><u>Examples:</u> Determine if the patron has a Wegner Center library card and proceed with materials check out. Obtain materials from patrons.</p> <p><u>Practice:</u> The learners will determine if the patron has a Wegner Center library card and proceed with materials check out. The learners will obtain materials from patrons</p>
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Cluster Two	<p><u>Content:</u></p> <ol style="list-style-type: none"> 1.3. Activate PALS system on circulation computer. <ol style="list-style-type: none"> 1.3.1. Basic computer skills, keyboarding skills, and computer operations ability.* 1.4. Scan the barcode on the Wegner Center library card with scanner. <ol style="list-style-type: none"> 1.4.1. Basic barcode scanner skills.* 1.5. Scan the barcode on each of the Wegner Center materials to be checked out to the patron. <ol style="list-style-type: none"> 1.5.1. Basic barcode scanner skills.* 1.5.2. Knowledge of barcode locations on Wegner Center materials.* 1.6. Key down to the proceed command and press enter. <p>Cluster two consists of activities that require the learner to activate PALS and scan information from the Wegner Center library card and Wegner Center materials into the PALS system. The instructor will discuss how to</p>
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	<p>activate PALS and steps to take when PALS will not activate. The instructor will discuss how to scan the barcode from the Wegner Center library card and scan the barcodes from Wegner Center materials into the PALS system.</p> <p><u>Examples:</u> Activate PALS; scan barcode from Wegner Center library card; and scan barcodes from Wegner Center materials.</p> <p><u>Practice:</u> The learners will activate PALS; scan barcode from Wegner Center library card; and scan barcodes from Wegner Center materials into the PALS system.</p>
<p>Cluster Three</p>	<p><u>Content:</u></p> <ol style="list-style-type: none"> 1.7. Write the due date displayed in PALS on a Wegner Center return slip. 1.8. Place return slip in Wegner Center materials. 1.9. Desensitize each of the Wegner Center materials being checked out by running them through the appropriate desensitizer. <ol style="list-style-type: none"> 1.9.1. Basic printed material desensitizer skills.* 1.9.2. Basic audio/visual material desensitizer skills.* 1.10. Tell patron when materials are due. 1.11. Return Wegner Center library card and checked out materials to patron. <p>Cluster three consists of activities that need to be completed by the learners to finish the process of checking out materials to Wegner Center patrons. The instructor will discuss writing the due date displayed in PALS on a Wegner Center return slip and placing the slip in the Wegner Center materials. The instructor will discuss desensitizing the Wegner Center materials. The instructor will discuss telling the patron when Wegner Center materials are due and returning the Wegner Center materials to the patron.</p> <p><u>Examples:</u> Write the due date on a Wegner Center return slip; place the Wegner Center return slip in Wegner Center materials; desensitize the Wegner Center materials; tell patron when Wegner Center materials are due; and return Wegner Center materials to patron.</p> <p><u>Practice:</u> The learners will write the due date on a Wegner Center return slip; place the Wegner Center return slip in Wegner Center materials; desensitize the Wegner Center materials; tell patron when Wegner Center materials are due; and return Wenger Center materials to patron.</p>

After the instruction and learner practice during instruction, the learners will load a patron record on their own with assistance from the instructor and the full time circulation desk staff assisting with the instruction. Following a break, the learners will

be evaluated with the administration of an embedded test. The embedded test will consist of three “live action” scenarios which will evaluate the Wegner Center evening and weekend circulation staff:

- checking out materials to a Wegner Center patron,
- loading a patron record, and
- loading a patron record and checking out materials to a Wegner Center patron.

Students from the University of South Dakota School of Medicine, the primary users of the Wegner Center, will serve as Wegner Center patrons for the scenarios.

Testing

(for additional testing information see the Performance Measurement section)

Entry behavior test – all Wegner Center staff must pass a basic computer skills, keyboarding skills, and computer operations ability exam prior to being employed. All Wegner Center staff are required to assist with checking in returned materials and shelving returned materials. The first skill obtained by new Wegner Center staff is the ability to scan barcodes on Wegner Center materials to check them in, resensitize and desensitize materials, and return them to their proper location on the shelves. Because of this the Wegner Center evening and weekend circulation staff will not need entry behavior testing prior to the instruction. During the pre-instructional section of the instruction, entry behavior will be reviewed.

Pretest – the pretest will not be used during instruction but has been utilized as an instruction development tool. Four of the Wegner Center evening and weekend circulation staff have received previous instruction from the circulation manager and the full time circulation staff in checking out materials to Wegner Center patrons and in loading patron records. However, as has been previously stated in the analysis of needs and goals, the instruction did not achieve the desired results – the ability of the Wegner Center evening and weekend circulation staff to proficiently and efficiently check out materials to Wegner Center patrons and load a patron record. The four Wegner Center evening and weekend circulation staff having previously received instruction served as the pretest group.

Embedded test - the Wegner Center evening and weekend circulation staff will be evaluated at the end of the instruction day. Although the evaluation is occurring at the end of instruction it is not a posttest. The embedded test will occur in the Wegner Center computer classroom. The embedded test will consist of three “live action” scenarios which will evaluate the Wegner Center evening and weekend circulation staff:

- checking out materials to a Wegner Center patron,
- loading a patron record, and
- loading a patron record and checking out materials to a Wegner Center patron.

Students from the University of South Dakota School of Medicine, the primary users of the Wegner Center, will serve as Wegner Center patrons for the scenarios.

Posttest – the posttest will be administered at the place of performance, the circulation desk. The posttest will occur within two weeks of the instruction. The seven Wegner Center evening and weekend circulation staff will be evaluated at the circulation desk

during their regular shift. The posttest will evaluate the Wegner Center evening and weekend circulation staff:

- checking out materials to a Wegner Center patron,
- loading a patron record, and
- loading a patron record and checking out materials to a Wegner Center patron.

Follow-up Activities

Memory aids for retention – memory aids were requested during the initial meetings with the Wegner Center evening and weekend circulation staff. A memory aid will be laminated and left at the circulation desk for the Wegner Center evening and weekend circulation staff to refer to when loading a patron record and checking out materials to Wegner Center patrons.

Transfer considerations – the Wegner Center computer classroom computers will be configured identical to the circulation desk computer for the training. Scanners and desensitizers used during the instruction will also be identical to the ones at the circulation desk. This should assist the transfer of skills from the computer classroom to the circulation desk. Also, the “live action” scenarios developed for the classroom using University of South Dakota School of Medicine students will mimic the conditions at the circulation desk – additional students waiting in line, phones ringing and needing to be answered, security gates buzzing, etc. The posttest will insure that skills have been transferred.

Student Groupings

The Wegner Center evening and weekend circulation staff consists of seven people. Because of the small size of the learner group, student grouping for instruction will not be necessary. However, during the “live action” scenarios the learners will be divided into groups of two or three, the usual number of staff working the circulation desk.

Selection of Media and Delivery Systems

The instructor will utilize equipment, Wegner Center materials, handouts, and visual presentations for the instruction of the Wegner Center evening and weekend circulation staff.

- The Wegner Center computer classroom will be equipped with the same equipment and tools used at the circulation desk. The computers will be configured identical to the circulation desk computer. The scanners will be identical to the scanners used at the circulation desk. The desensitizers will be identical to the desensitizers at the circulation desk. The Wegner Center library card request forms, the Wegner Center library cards, the Wegner Center return slips will be the same as ones used at the circulation desk.
- The Wegner Center evening and weekend circulation staff will be given handouts in class to use when entering information during the practice sessions of the instruction. One handout will be a completed Wegner Center library request form

for Sabina K. Crandell. One handout will be a completed Wegner Center library request form for another imaginary patron. Another handout will be the memory aid that will be laminated and kept at the circulation desk.

- The Wegner Center computer classroom is equipped with an instructor computer station attached to an LCD projector and an ELMO digital video presenter. The LCD projector will allow the instructor to project the PALS entry screens for the learners to see as examples are entered into the PALS system. The ELMO digital video presenter will allow the instructor to display the Wegner Center library card, the Wegner Center library card request forms, and barcodes on the Wegner Center materials to the learners. The instructor will also utilize a PowerPoint presentation to introduce the learners to the Sabina K. Crandell, the imaginary patron used for example by the instructor and for practice by the learners during the instructional session. The PowerPoint presentation will provide images of Sabina as she approaches the circulation desk, engages the circulation staff, and the circulation staff loads Sabina's patron record and checks out Wegner Center materials to her.

Instructional Materials

Instructional Materials

The instructional materials consist of:

- a PowerPoint presentation of instruction that includes suggested scripting for the instructor,
- three practice scenarios to be enacted by University of South Dakota medical student volunteers,
- the following items for the learners to use during the instruction:
 - two completed Wegner Center library card request forms labeled 1 and 2,
 - two Wegner Center library cards,
 - two Wegner Center books,
 - a Wegner Center video, and
- a laminated memory aid for the learners to take with them after class.

Instruction will be presented using the PowerPoint presentation “Weekend and Evening Circulation Staff Training.” A copy of the PowerPoint presentation will be provided to the learners in order for them to make notes as the instruction progresses. During the instruction the learners will use the items which have been given to them prior to the instruction for in class participation and practice.

At the end of the PowerPoint presentation, the class will take a short break. During the break the instructor will create two mock circulation desks in the classroom for the practice scenarios. Each of the two mock circulation desks will include:

- a computer configured identically to the circulation desk computer,
- a scanner,
- a book desensitizer,
- a video desensitizer,
- blank Wegner Center library card request forms,
- pens,
- Wegner Center library cards,
- Wegner Center return slips, and
- a telephone.

After the break, the learners will return to the Wegner Center computer classroom and load a patron record from a completed Wegner Center library card request form. The instructor and full time circulation desk staff providing assistance with the class will be available to assist learners.

After the learners have completed loading the patron record, the class will be divided into two groups to participate in the scenarios. The instructor and full time circulation desk staff assisting with the instruction will use the checklist previously developed to evaluate the performance of the learners.

Wegner Center Circulation Desk Performance Checklist			
Checking out materials to Wegner Center patrons			
Asks patron for library card	Yes	No	NA
Obtains materials from patron	Yes	No	NA
Activates PALS	Yes	No	NA
Scans library card	Yes	No	NA
Scans materials	Yes	No	NA
Keys to proceed command and enters	Yes	No	NA
Writes due date on return slip	Yes	No	NA
Places return slip in materials	Yes	No	NA
Desensitizes books	Yes	No	NA
Desensitizes AV materials	Yes	No	NA
Tells patron due date	Yes	No	NA
Returns library card to patron	Yes	No	NA
Returns materials to patron	Yes	No	NA
Loading patron record			
Gives patron library card request form and pen	Yes	No	NA
Activates PALS	Yes	No	NA
Obtains library card from drawer	Yes	No	NA
Enters load patron record code "LPR"	Yes	No	NA
Enters system password	Yes	No	NA
Determines patron type and enters	Yes	No	NA
Scans barcode from library card	Yes	No	NA
Enters patron registration ID	Yes	No	NA
Determines patron use of SSN and enters	Yes	No	NA
Enters patron's name (last, first, MI)	Yes	No	NA
Enters patron's circ class	Yes	No	NA
Enters expiration date	Yes	No	NA
Enters address to use	Yes	No	NA
Determines patron residency and enters	Yes	No	NA
Determines patron's age and enters	Yes	No	NA
Enters home address and telephone number	Yes	No	NA
Enters business address and telephone number	Yes	No	NA
Enters e-mail address	Yes	No	NA
Keys to proceed command and enters	Yes	No	NA
Gives library card to patron	Yes	No	NA
Staff member:			
Date:			
Time:			
Evaluator:			
Comments:			

PowerPoint Presentation

A PowerPoint presentation, containing over forty PALS screenshots, will be presented by the instructor during the instruction. Following is the scripting for the instructor to use during the instruction. (Including the PowerPoint slides with the scripting in this document takes the file from 1.5 MB to 32.5 MB, even with extensive image compression. The PowerPoint presentation containing the slides and scripting is being submitted separately.)

Slide 1

The instructor will bring the class to order. Allow time for the learners to get to their seats and settle themselves.

Instructor –

“Hi, I’m Ernetta Fox and I’ll be your instructor for today’s class. I’m the Head of Outreach and Education here at the Wegner Center. I hope that today you will learn something new and that what you learn will assist you as you work the circulation desk. But most of all I want today’s class to be enjoyable. Don’t be afraid to stop me and ask questions, it’s probably a question everyone has. If your questions take us on a side trip away from the main objectives of the class, that’s fine and I’ll get us back on track.

I am sure most of you know this, but it is part of my introduction to any of the classes I teach here at the Wegner Center. The restrooms are located upstairs. Take the elevator directly outside the classroom door. Pop and candy machines are located in the staff lounge behind the classroom. If you have a cell phone or pager with you and are not on call, please turn your cell phone or pager off during the class. Feel free to stand up and move around if you need to. I know the chairs in the classroom aren’t the most comfortable.”

Slide 2

Instructor -

“To begin today I would like to take a few moments for everyone to get to know each other. So, when we get to you, tell the class –

- Your name and anything you want us to know about you,
- How long you have worked at the Wegner Center,
- When you work at the Wegner Center, and
- What you hope to learn from this class today.”

Go around the class and allow everyone to introduce themselves.

Instructor –

“Excellent! It’s obvious all of you are dedicated to working at the Wegner Center and providing the best possible patron service. That’s why we’re here today.

Most of you stated you hope to learn how to become more efficient and effective at processing patron transactions in PALS. And most of you stated your frustration with the PALS system. Well today, we're going to take it slow and easy and learn how to process two patron transactions in PALS."

Slide 3

Instructor –

"We have two objectives for today.

Our first objective is to learn how to load a patron record with 100% accuracy. Some of you have been previously trained in loading a patron record. Today, we're going to go through the process slowing and deliberately, explaining the process step-by-step. We're also going to work through four different examples, one as a group and three individually, so that you will leave class today having loaded four patron records.

Our second objective is to learn to check out Wegner Center materials with 100% accuracy. This is the simpler of the two processes so we are going to save it for last."

Note –

The objectives in the instructional strategy have a time limit attached to them – 10 minutes and 5 minutes respectively. Due to the type of learners – retired physicians and healthcare professionals who work at the Wegner Center because of their belief in the mission, the time limits have been removed from the objectives for instructional purposes.

Slide 4

Instructor –

"But first I want to talk about why it is important that all patron transactions be processed in PALS with 100% accuracy. PALS, even though it is an antiquated and frustrating system to use, provides the Wegner Center and its partner organizations with patron and item usage statistics that are used for annual reports, grant applications, and strategic planning. So, again, why is accuracy so important?

Let me show you some examples."

Slide 5

Instructor –

"The Center for Disabilities is a program within the School of Medicine that is 100% grant funded. It is important in their annual reports and in grant

applications for them to prove that they are making an impact on the lives of people with disabilities, their families, their caregivers, and their educators.

One of the fields that is often incorrectly entered in the patron record is circ class. Circ class identifies a patron by the partner organization with which they are most closely associated. Circ class 7 is for Center for Disabilities consumers. Circ class 17 is for University of South Dakota Department of Nursing. By incorrectly entering the circ class the Center for Disabilities could lose important numbers.

Another set of statistics that is kept by PALS is the number of items circulated to Center for Disabilities consumers. Again, if the patron record was incorrectly entered it will affect the number of items attributed to Center for Disabilities consumers.

And not only is entering a patron record correctly important, checking out Wegner Center materials correctly is important. Another set of statistics that is kept by PALS is the number of items circulated from the Center for Disabilities collection. These statistics help plan for future collection development and determine if additional copies of items should be ordered.”

Slide 6

Instructor –

“Another partner organization that relies heavily upon PALS statistics is the Community HealthCare Association. The Community HealthCare Association is heavily grant funded and relies on PALS statistics to show the impact they are making in rural and underserved areas of South Dakota.

Another one of the fields that is often incorrectly entered in the patron record is local patron. Entering a Y for yes indicates that the patron lives in Sioux Falls – an urban area. Entering an N for no indicates that the patron lives outside Sioux Falls – a rural area. According to the US Census bureau, there is only one urban area in South Dakota – Sioux Falls, everything else in the state is considered to be rural. Therefore, this one statistic provides the Community HealthCare Association with important statistics for their grant applications.

And as with the Center for Disabilities, not only is entering a patron record correctly important, checking out Wegner Center materials correctly is important. Another set of statistics that is kept by PALS is the number of items circulated from the public health collection. These statistics help plan for future collection development and determine if additional copies of items should be ordered.”

Slide 7

Instructor –

“Ok!! Let’s get started!

Turn on your computer and monitor. As your computers are booting are there any questions that you have so far about what we have covered or any questions about anything else? Good.

Go ahead and log onto the network.

The first thing we need to do is check and make sure that the scanner attached to your computer is working properly. Open Notepad on your computer. To do this, go to the start button, go to programs, go to accessories, and click on Notepad. Now that Notepad is open, scan the barcodes on the books located at your computer. The numbers that appear in Notepad should match the numbers located below the barcode. Everyone's scanner working well? Good! Let's close Notepad.

Next there is a 3X5 card at your computer with your name on the top. If you would write your system password – that is the “secret” password that was given to you when you began working at the Wegner Center – on the 3X5 card. Pass those forward and the Circulation Manager will confirm those for us.”

Note –

As the instructor describes how to open Notepad, the instructor will be demonstrating the steps on the instructor computer and will be projecting them via the LCD projector to the screen. These steps will also confirm the entry behaviors of the learners.

Slide 8

Instructor –

“We will start by loading a patron record, the first of our four during today's class. We will all be loading the same patron record. From there we'll move into checking out materials to the same patron. This will allow us to follow the transaction from the first contact with the patron until the patron leaves with her materials. Again, don't hesitate to stop me and ask questions. If I am going too fast, let me know and I'll slow down.

I'd also like to take a moment to thank Rhonda for providing assistance with the class today. All of you know Rhonda, one of the day time circulation staff. She will be hanging out in the back of the classroom ready to lend assistance to anyone who needs it.

I would also like to thank Rhonda and Sabina, our work study student, for serving as models for today's presentation.

Are we ready? Are we fired up? Let's go!!”

Slide 9

Instructor –

“Most patron interactions begin when the patron approaches the circulation desk to either ask a question or to check out Wegner Center materials. Sabina, our first patron of the day has approached the circulation desk with several books and a video and asked if she may check them out.”

Notes –

Begin Cluster One of Terminal Objective #2

Slide 10

Instructor –

“Rhonda, our circulation librarian for the day, provides a positive response to the request. It is important for you to be pleasant to the patron and provide them with exceptional service. Rhonda asks Sabina if she has a Wegner Center library card. Because of the way statistics are reported to the Wegner Center partner organizations, all Wegner Center patron transactions require a Wegner Center library card. If a patron does not have a Wegner Center library card and does not want to fill out the Wegner Center library card request form and obtain a Wegner Center library card, refer them to the library staff in charge.”

Slide 11

Instructor –

“Sabina says she does not have a Wegner Center library card. Rhonda provides her with a Wegner Center library card request form to fill out. She also offers Sabina a pen. It’s also a good idea to ask the patron if they have any questions. Some patrons may need assistance filling out the library request form (patrons with visual or mobility impairments, patrons who speak English as a second language, etc.).”

Slide 12

Instructor –

“This is the Wegner Center library card request form. They are kept in the file folders next to the circulation desk. For today’s class you will find a completed Wegner Center library card request form next to your computer. There is a number one in the upper right hand corner. This is the Wegner Center library card request form completed by Sabina.”

Slide 13

Instructor –

“While the patron is filling out the Wegner Center library card request form, obtain a Wegner Center library card from the drawer next to the circulation desk. For today’s class, you will find a Wegner Center library card next to your computer.”

Slide 14

Instructor –

“With the completed Wegner Center library card request form and the Wegner Center library card in hand you are now ready to begin loading the patron record. You start the process by activating PALS on the circulation desk computer. Your computer in class today has been configured identical to the circulation desk computer. Your computer desktop looks identical to the image on the screen.

To activate PALS you double click on the PALSTAC shortcut on the circulation desk computer desktop. I’m going to double click on my PALSTAC shortcut while you click on yours.”

Slide 15

Instructor –

“This will be the screen that appears after you have activated PALS. Does everyone now have this screen showing on their computer? Good.

One thing you will not see on your screen is the white line underlining the PALS prompt. I have underlined the PALS fields we will be talking about on each of the screens so that you may see it better on the screen.

A couple of things I want to tell you about PALS. Pressing F1 will always give you a help screen about PALS. Let me show you how that works. (The instructor will demonstrate calling up and using the PALS help menu. This is not a part of the official training but will provide the learners with some additional knowledge about the PALS system.) To exit the help screen press the escape – esc – key in the upper left hand corner of your keyboard. An F2 will always give you a drop down menu if the field has a drop down menu available. We’ll see how that works later on.

The default PALS prompt is to the catalog feature of PALS. (Point out the PALS prompt to the learners.)

At the end of this prompt is where the cursor is located even though you can’t see it. When you enter data either by typing or scanning the information entered will appear at the end of the prompt.”

Notes –

End Cluster One of Terminal Objective Two

Slide 16

Instructor –

“To open the load patron record screen, type “lpr” for load patron record at the PALS prompt. All of the commands in PALS tend to relate to the function in some way. For example one of the PALS commands is “re” for recall previous screen. Another command is “di” for display. So to load a patron record the command is “lpr”. So, go ahead and type “lpr” and press enter. (Instructor demonstrates at the same time.)”

Notes –

Begin Cluster Two of Terminal Objective Two

Slide 17

Instructor –

“Does everyone have this screen on their computer? Good! This is the load patron record screen. One of the things about PALS is the screen becomes dark blue where you are in systems that allow you to input and store data. So, you can tell by the color and the “LPR – Load Patron Record” at the top of the screen, that you are in a system that will allow you to input and store data. We are going to be inputting data from Sabina’s Wegner Center library card request form. Another thing to note is that the command prompt has disappeared. In the systems that allow you to input and store data, a lighter blue rectangle appears for you to enter the data in. Not only is the data to be entered identified to the left of the lighter blue input box, but is also identified at the bottom of the screen. See where it says “Your system password?” If you are in doubt what needs to be entered into the lighter blue input box, check the bottom of the screen.

To start the session you have to enter your system password. All of your passwords, the ones you wrote on the 3X5 cards earlier have been confirmed and are ready to go. So, go ahead and type your password in and press enter. (Instructor demonstrates at the same time.)”

Notes –

End Cluster Two of Terminal Objective Two

Slide 18

Instructor –

“The system next asks you to enter the type of patron record. If you’ll remember from earlier, pressing F1 will give you a help menu; pressing F2 will give you a drop down menu, if the PALS field has a drop down menu available. If you press F2 now, as I am doing, you’ll get a drop down menu defining the types of patron records. At the Wegner Center we only use “L”, “S”, or “F”. “L” is for local patron – that is anyone who is not a student or employed by one or associated

with one of the Wegner Center partner organizations. “S” is for student – a student of one of the Wegner Center partner organizations. “F” is for faculty – a faculty member of one of the Wegner Center partner organizations. How can you tell if the patron is an “L”, “S”, or “F”? If you will look at Sabina’s Wegner Center library card request form, you will see on the lower left hand side a list of the Wegner Center partner organizations and the different circulation classes that have been established for them. You’ll see that Sabina has circled “17 – USD Nursing” and she has listed her occupation as “Student”. Therefore, she is a student of one of the Wegner Center partner organizations so she would be an “S”. Questions? If you have any doubts about the information on the Wegner Center library card request form, ask the patron if they are affiliated with any of the Wegner Center partner organizations.

Everyone with me? Any questions? Ok, let’s select “S” and press enter. (Instructor demonstrates at the same time.)”

Notes –
Begin Cluster Three of Terminal Objective Two

Slide 19

Instructor –
“Next we need to enter the patron barcode. This is the barcode off the back of Wegner Center library card you have obtained from the drawer next to the circulation desk. Today, you’ll find a Wegner Center library card next to your computer to use. Scan the barcode with the scanner and press enter. (Instructor demonstrates at the same time.)”

Slide 20

Instructor –
“Now is the time to enter the patron’s registration ID. This is a library generated registration ID. Here at the Wegner Center it is the last nine numbers of the patron’s library card barcode. Because it is not the entire barcode, you can not scan it to enter it. Let’s type in the last nine digits of the barcode from the Wegner Center library card you are using for class today. (Instructor demonstrates at the same time.)”

Slide 21

Instructor –
“Social security number. Although we ask for a social security number on the Wegner Center library card request form, a patron does not have to give us their social security number in order to obtain a Wegner Center library card. Even if a patron puts their social security number on the Wegner Center library card request

form, you will still need to ask the patron if they want to use their social security number.

Rhonda asked Sabina if she wishes to use her social security number. Sabina says she does not. Rhonda then generates an ID number for her. The ID is generated by using the date the patron record was loaded plus the last three digits of the library card barcode. For Sabina it would be today's date – 072603 – plus the last three digits of her library card barcode. You may look back up in the patron record and see the library card barcode.

Let's go ahead and enter the library generated ID for Sabina – 072603 – plus the last three digits of her library card barcode. (Instructor demonstrates at the same time.)”

Notes –

End Cluster Three of Terminal Objective Two

Slide 22

Instructor –

“Let's take a moment to recap. We've loaded a lot of information about this patron, most of which required us, as circulation desk staff, to make decisions or determinations – type of record, library card barcode, registration ID, and social security number. Are there any questions about what we have entered or why we entered it? Is every one feeling confident and ready to go on? OK!!

Now we come to some easy data entry – directly from the Wegner Center library request form. First, we enter the patron's last name. Let's do that. (Instructor demonstrates at the same time.)”

Notes –

Begin Cluster Four of Terminal Objective Two

Slide 23

Instructor –

“Next we enter the patron's first name. Let's do that. (Instructor demonstrates at the same time.)”

Slide 24

Instructor –

“Next we enter the patron's middle initial. This is optional, although most patrons put a middle initial on the Wegner Center library card request form. Let's enter Sabina's middle initial. (Instructor demonstrates at the same time.) Now we have the patrons name entered. Any questions about entering the patrons name? Good.”

Notes –
End Cluster Four of Terminal Objective Two

Slide 25

Instructor –

“You will notice that Patron/Library/School name is next. As I’ve stated before, the Wegner Center does not use all the fields that are available in the patron record. One of the fields that is not used is Patron/Library/School Name. Therefore, after you have entered the patron’s middle initial, the lighter blue data entry box appears for you below the Patron/Library/School Name at the circ class field. This is because the Wegner Center has only activated the fields that should have data entered into them.

Patron circ class is next. This is very important for the statistics that the Wegner Center provides back to its partner organizations. On the Wegner Center library card request form on the lower left hand side are the different circulation classes. Each is associated with a partner organization. Some only have one circulation class because it isn’t important for the partner organization to differentiate between faculty, students, or employees. For example: 5 – Veteran’s Affairs Medical Center Faculty and Staff, or 9 – Wellmark. Some of the partner organizations have multiple patron classes because it is important to differentiate between faculty, students, and others. For example: 6 – Center for Disabilities faculty, 7 – Center for Disabilities Consumers, and 8 – Center for Disabilities student. If the patron hasn’t circled a circulation class on the Wegner Center library card request form, ask the patron about their affiliation with the partner organizations. A patron does not have to have an affiliation with a partner organization. That is why the Wegner Center has circulation class 10 – public. Anyone can obtain a Wegner Center library card. Any questions about Wegner Center circulation classes? Good!
Sabina has circled 17 – University of South Dakota Nursing. Let’s enter that. (Instructor demonstrates at the same time.)”

Notes –
Begin Cluster Five of Terminal Objective Two

Slide 26

Instructor –

“Now it is the time to enter the library card expiration date. The expiration date is two years from the date the patron record was entered. So, we would enter 072605. Let’s do that. (Instructor demonstrates at the same time.)”

Slide 27

Instructor –

“The patron record allows you to enter a home address, a business address, and an e-mail address. Address to use sets the address for PALS automated overdue notice feature. Selecting a 1 sets the feature to use the home address. Selecting 2 sets the feature to use the business address. Selecting a 3 sets the feature to use the e-mail address. For consistency, the Wegner Center has elected to use 1 as the address to use for overdue notices. Let’s go ahead and enter 1. (Instructor demonstrates at the same time.)”

Slide 28

Instructor –

“This is another important item when entering information into the patron record. As I’ve stated previously, a lot of the Wegner Center partner organizations use the statistics generated by PALS for grant applications. As you know, South Dakota is a rural state. According to the U.S. Census, Sioux Falls is the only urban area in the state – everything else is rural. Entering the distance status of a patron is very important and provides an impressive statistic for the outreach aspects of the Wegner Center.

If the patron lives in Sioux Falls, enter N for non-distance patron. If the patron lives anywhere else in South Dakota or the region, enter Y for distance patron. Looking at Sabina’s address on the Wegner Center library card request form we need to enter N. Let’s do that now. (Instructor demonstrates at the same time.)”

Notes –

End Cluster Five of Terminal Objective Two

Slide 29

Instructor –

“We’ve come to another easy part of the patron record – address.

But before we enter Sabina’s address, let’s take a look at the white data entry block above the active light blue data entry box. You’ll see there is an optional field for guardian name. If the patron is under 18 years of age, we need to enter a guardian name. Because of the nature of the Wegner Center – a medical library serving the needs of graduate students and healthcare professionals – seldom if ever will you need to enter a guardian name. However, if you have a patron appears to be under 18 years of age ask them their age. If they are under 18 years of age, ask for their parent’s or guardian’s name. Any questions?

Now let’s enter Sabina’s address. Address #1 is the home address which is the second address listed on the Wegner Center library card request form. First you

enter her street address. Two lines are provided if needed. Let's enter the street address. (Instructor demonstrates at the same time.)”

Notes –
Begin Cluster Six of Terminal Objective Two

Slide 30

Instructor –
“Now let's enter the city. (Instructor demonstrates at the same time.)”

Slide 31

Instructor –
“Now let's enter the state. You may use the two letter state abbreviation. (Instructor demonstrates at the same time.)”

Slide 32

Instructor –
“Now let's enter the zip code. (Instructor demonstrates at the same time.)”

Slide 33

Instructor –
“Telephone number – if the person resides in South Dakota there is no need to enter the area code. If the person is from a neighboring state, enter the area code before the telephone number. Let's enter Sabina's telephone number. (Instructor demonstrates at the same time.)”

Slide 34

Instructor –
“Now is the time to enter Address #2 – business address which is first on the Wegner Center library card request form. Most patrons will not have a business address to enter, as is Sabina's case. If there is no business address, enter “None” in the first address line. Let's do that now. (Instructor demonstrates at the same time.)”

Slide 35

Instructor –
“Ok, here we are at the end of the patron record. The last item to enter in the patron record is the patron's e-mail address. This allows us to add the patron to our e-mail newsletter and our class notices. Let's enter Sabina's e-mail address. (Instructor demonstrates at the same time.)”

Notes –
Enter Cluster Six of Terminal Objective Two

Slide 36

Instructor –
“Now you will see that proceed is in the light blue input box. Press enter and Sabina’s patron record will be loaded. It is loaded instantaneously. Therefore, you can immediately check out Wegner Center materials to her. Let’s press enter and see if we have successfully loaded Sabina’s patron record. (Instructor demonstrates at the same time.)”

Notes –
Begin Cluster Seven of Terminal Objective Two

Slide 37

Instructor –
“If you have successfully loaded a patron record, this is the screen you will see. It shows the patron’s name – Crandell, Sabina K. It shows the date her library card will expire. It shows the status of her library card – active. It shows how many Wegner Center materials she currently has checked out – none. It shows her circ class – 17 USD nursing. It shows any fines she owes – currently none. It also shows us any additional monies due to the library – for interlibrary loans or lost books.

Are there any questions about how to load a patron record? Later you will have an opportunity to load three more patron records.”

Slide 38

Instructor –
“Now that the patron record has been loaded you may give the Wegner Center library card to the patron.

Now then, stand up, turn to the person closest to you and shake their hand. Tell them “Congratulations! You have successfully loaded your first patron record.”

Excellent!! Now deep breathe in, breathe out, and let’s continue.

Now that Sabina has a Wegner Center library card she wishes to check out materials from the Wegner Center. Checking out materials is a breeze compared to loading a patron record – trust me.”

Notes –
End Cluster Seven of Terminal Objective Two

Begin and End Cluster One of Terminal Objective One

Slide 39

Instructor –

“To begin the process of checking out Wegner Center materials to a patron activate PALS if needed.”

Notes –

Begin Cluster Two of Terminal Objective One

Slide 40

Instructor –

“However, PALS may still be active since you have already used PALS to process another patron transaction. Anytime you see the light blue screen, PALS is active. Anytime you see the PALS prompt with no information behind it, it is ready for you to process a patron transaction. If you look at the PALS screen on your computer, this is what you should see. Everyone see this? Good! This shows you that you have successfully loaded Sabina’s patron record. Because the PALS screen is still light blue it is an active screen and ready for you to process your next patron transaction – checking Wegner Center materials out to Sabina.”

Slide 41

Instructor -

“Let’s begin the process of checking out Wegner Center materials. Ask the patron for their library card and scan the barcode on the back. This will automatically enter the patron’s barcode into PALS and open the charge item screen. Let’s scan Sabina’s library card barcode into the already active PALS system. (Instructor demonstrates at the same time.)”

Slide 42

Instructor –

“After scanning the patron’s barcode the charge items screen appears. PALS uses “charge item” instead of “checking out items”. If you think of it in terms of putting items on the patron’s library card in the same way as putting purchases on a credit card, charge item makes sense.

You’ll see that the patron barcode number has been entered into the patron field. You are now ready to check out Wegner Center materials to the patron.”

Slide 43

Instructor –

“Scan the barcode from the first time to be checked out to the patron. You will see that the item number from the barcode is entered into the item #1 data entry block. There is no need to press enter. When you scan the next item it will automatically advance to the next item.

Next to your computer there are two books and a video, the same types of items that Sabina wants to check out from the Wegner Center. Go ahead and select one of the books and scan the item barcode on it. (Instructor demonstrates at the same time.)”

Slide 44

Instructor –

“Now scan the barcode on the second book. (Instructor demonstrates at the same time.)”

Slide 45

Instructor –

“Now scan the barcode on the video. (Instructor demonstrates at the same time.)

You’ll see on the PALS screen that we have three items listed.”

Slide 46

Instructor –

“The next step is to finish the process. Press the end key, located on the upper right side of your keyboard. This tells PALS that you have scanned all the items that the patron wants to check out and you are ready to finish the process. Pressing the end key takes you to the bottom of the charge items screen and highlights “proceed”. Now press enter and the process will be completed. (Instructor demonstrates at the same time.)”

Slide 47

Instructor -

“If you have successfully checked out the items to the patron this is the screen you will see. It shows the patron’s name – Crandell, Sabina K. It shows the date her library card will expire. It shows the status of her library card – active. It shows how many Wegner Center materials she currently has checked out –3. It shows her circ class – 17 USD nursing. It shows any fines she owes – currently none. It also shows us any additional monies due to the library – for interlibrary loans or lost books. These items are consistently shown when a patron transaction is completed. However, since we were checking materials out to a patron, the due date for the materials is also displayed.

Are there any questions about checking out materials to a patron? Good!!”

Notes –
End Cluster Two of Terminal Object One

Slide 48

Instructor –
“There are still two steps to complete prior to giving the materials to the patron. First, you must desensitize the books and video so they will not set off the security gate when the patron leaves the library. The books are desensitized with the desensitizer located on the circulation desk. The videos are desensitized with the video desensitizer located behind the circulation desk. It is very important that the videos not be desensitized with the book desensitizer because it will erase the video!!”

Notes –
Begin Cluster Three of Terminal Object One

Slide 49

Instructor –
“Next you need to let the patron know when the materials are due. Write the due date that is displayed on the PALS screen after the successful completion of checking out materials on the Wegner Center return slip. Place the return slip in the Wegner Center materials.”

Slide 50

Instructor –
“The last step in the process is to give the Wegner Center materials and patron library card to the patron. Remember, customer service with a smile!

Are there any questions about checking out materials to Wegner Center patrons?
Are there any questions about loading a patron record? Are there any questions about anything? Good!”

Notes –
End Cluster Three of Terminal Objective One

Slide 51

Instructor –
“Excellent – you’ve earned a break. But first, let me tell you what’s coming up after break.


First you will be loading a patron record from a Wegner Center library card request form. That form is currently next to your computer with a Wegner Center library card paper clipped to it. This one is a little more difficult than Sabina's, but I'm sure you can handle it! This is your opportunity to ask any questions and to proceed at your own pace. Rhonda and I will be available if you need us.

Afterwards, three University of South Dakota medical students have volunteered to be our lab rats for the day. Each of the students will approach our circulation desks we have created here in the classroom and you will provide them with service. One of the students will just want to check out materials. One of the students will just want to obtain a Wegner Center library card. One of the students will want to obtain a Wegner Center library card and check out materials. Each of you will have the opportunity to work through each of the scenarios. And Rhonda and I will again be available if you need us.

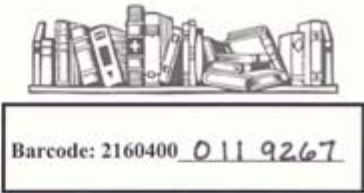
So, let's take a 10 minute break. When you get back you may begin to load the patron record using the Wegner Center library card request form next to your computer. There is a number 2 in the upper right hand corner."

Completed Wegner Center Library Card Request Forms

1



Wegner Health Science Information Center
SDLN Load Patron Record Form



Barcode: 2160400 011 9267

Social Security Number: 555-12-4488

Last Name: CRANDELL

First Name: SABINA Middle Initial: K

Occupation (major): STUDENT

Circle Affiliation

- 1 Med Student
- 2 Wegner Staff
- 3 USDSM F-S
- 4 SVH-UMC F-S
- 5 VAMC F-S
- 6 CTR DIS.Faculty
- 7 CTR DIS Consumer
- 8 Ctr Dis Student
- 9 Wellmark
- 10 Public
- 11 Med Resident
- 12 SDSU Grad. Nurse
- 14 SVHS F-S
- 15 SDSU Pharmacy
- 16 CHA
- 17 USD Nursing

Primary Email Address: scrand@usd.edu
(Email address used for all library communication when possible)

Business Address: NONE

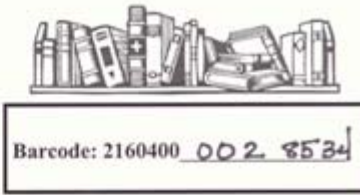
City/State/Zip: _____

Phone: _____

Home Address: 268 S. SEA GRASS

City/State/Zip: SIoux FALLS SD 57105

Phone: 333-1246



Social Security Number: 555-99-8642
 Last Name: WOLSETH
 First Name: MIKE Middle Initial: C.
 Occupation (major): TEACHER



- Circle Affiliation**
- 1 Med Student
 - 2 Wegner Staff
 - 3 USDSM F-S
 - 4 SVH-UMC F-S
 - 5 VAMC F-S
 - 6 CTR DIS Faculty
 - 7 CTR DIS Consumer
 - 8 Ctr Dis Student
 - 9 Wellmark
 - 10 Public
 - 11 Med Resident
 - 12 SDSU Grad. Nurse
 - 14 SVHS F-S
 - 15 SDSU Pharmacy
 - 16 CHA
 - 17 USD Nursing

Primary Email Address: mcwone@hotmail.com
 (Email address used for all library communication when possible)



Business Address: EDISON ELEMENTARY

City/State/Zip: VIBORG, SD 57038

Phone: 677-1210

Home Address: RR 1 Box 15

City/State/Zip: CENTERVILLE, SD 57042

Phone: 624-0108

Scenarios

Scenario #1

Checking out Wegner Center materials.

Mitch is a fourth year medical student. He has a library card and wants to check out a variety of materials from the Wegner Center. Mitch has:

- four text books,
- three videos,
- an audio cassette, and
- two anatomical posters.

This scenario will require the learner to meet terminal objective #1:

- The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to check out materials to Wegner Center patrons with 100% accuracy within five minutes.

Scenario #2
Loading a patron record.

Laura is a second year medical student. She has a library card for the main University of South Dakota School of Medicine library in Vermillion but uses the Wegner Center frequently because she lives in Sioux Falls. She would like to go ahead and get a Wegner Center library card while she has the day off. (She will complete the Wegner Center library card request form given to her by the learner with the same information shown on the Wegner Center library card request form below.)

This scenario will require the learner to meet terminal object #2:

- The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to load a patron record with 100% accuracy within ten minutes.




SDLN Load Patron Record Form

Barcode: 2160400 _____

Social Security Number: 222-86-4242

Last Name: HUDDDELSTON

First Name: LAURA Middle Initial: M

Occupation (major): STUDENT

Circle Affiliation

- 1 Med Student
- 2 Wegner Staff
- 3 USDSM F-S
- 4 SVH-UMC F-S
- 5 VAMC F-S
- 6 CTR DIS Faculty
- 7 CTR DIS Consumer
- 8 Ctr Dis Student
- 9 Wellmark
- 10 Public
- 11 Med Resident
- 12 SDSU Grad. Nurse
- 14 SVHS F-S
- 15 SDSU Pharmacy
- 16 CHA
- 17 USD Nursing

Primary Email Address: lhudde@usd.edu
(Email address used for all library communication when possible)

Business Address: NONE

City/State/Zip: _____

Phone: _____

Home Address: 1218 Plum
3

City/State/Zip: VERMILLION, SD 57069

Phone: 267-1234

Scenario #3
Loading a patron record.

Carla is a Sioux Valley Hospital employee. She has never used the Wegner Center before but needs to check out some materials for her daughter to use in preparing a biology presentation. The materials she wants to check out include:

- five books,
- two videos, and
- a journal.

(She will complete the Wegner Center library card request form given to her by the learner with the same information shown on the Wegner Center library card request form below.)

This scenario will require the learner to meet terminal object #1 and #2:

- The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to check out materials to Wegner Center patrons with 100% accuracy within five minutes.
- The Wegner Center evening and weekend circulation staff, while working the circulation desk, will be able to load a patron record with 100% accuracy within ten minutes.




SDLN Load Patron Record Form

Social Security Number: 321-86-4222

Last Name: MADISON

First Name: CARLA Middle Initial: L.

Occupation (major): NURSE

Circle Affiliation

- 1 Med Student
- 2 Wegner Staff
- 3 USDSM F-S
- 4 SVH-UMC F-S
- 5 VAMC F-S
- 6 CTR DIS Faculty
- 7 CTR DIS Consumer
- 8 Ctr Dis Student
- 9 Wellmark
- 10 Public
- 11 Med Resident
- 12 SDSU Grad. Nurse
- 14 SVHS F-S
- 15 SDSU Pharmacy
- 16 CHA
- 17 USD Nursing

Primary Email Address: carla.madison@svh.org
(Email address used for all library communication when possible)

Business Address: SIoux VALLEY HOSPITAL
NEONATAL INTENSIVE CARE

City/State/Zip: SIoux FALLS, SD ?

Phone: 303-1268

Home Address: 12865 264th AVE.

City/State/Zip: CANTON, SD 57124

Phone: 285-1215

Memory Aid

The memory aid is a two sided laminated 6X4 card. One side contains memory aids for loading a patron record. The other side contains memory aids for checking out materials to patrons. Each of the Wegner Center evening and weekend circulation staff will receive a memory aid. There will also be a memory aid placed by the computer at the circulation desk.

Memory Aid Side #1 – Loading a Patron Record

Load a Patron Record

Give patron library card request form and pen.
Activate PALS, if needed.
Obtain library card from drawer.
Enter:
 LPR
 System Password
 Patron Type (L, S, F)
Scan:
 Library barcode
Enter:
 Patron ID (last 9 of barcode)
 SSN or ID (mm/dd/yy+last 3 of barcode)
 Patron's name
 Patron's circ class
 Expiration date
 Address to use (1)
 Patron residency
 Guardian (if needed)
 Enter home address & telephone #
 Enter business address & telephone #
 or None
 Enter e-mail address
 Proceed command
Give library card to patron.

Checking Out Materials

Ask patron for library card.
Obtain materials from patron.
Activate PALS, if needed.
Scan library card.
Scan materials.
Key to proceed command and enter.
Write due date displayed in PALS on
return slip.
Place return slip in materials.
Desensitize books.
Desensitize AV materials.
Tell patron due date.
Return library card to patron.
Return materials to patron.



Formative Evaluations

Subject Matter Expert Evaluation

Prior to beginning the formative evaluations with the target learners, the subject matter expert – Sue Carlson, the Wegner Center circulation manager – reviewed the instructional materials. As the instructional designer, I guided Sue through the instructional materials, in a one-on-one evaluation format. Sue, who is a PALS system expert, thought the instructional materials were too detailed and that there was no need to show an individual screen shot for each entry, although she admitted for the learner group we were targeting it was appropriate. She thought that the variety of patrons selected for examples during the instruction were adequate, however she felt they did not represent any problematic or difficult patron record loads that the evening and weekend circulation staff might encounter. I reminded Sue that the objectives of the instruction was to train the evening and weekend circulation staff to load a patron record and check out materials, not to instruct the evening and weekend circulation staff to deal with problematic or difficult patron record loads. Sue agreed. Sue also liked the “live action” scenarios planned for the end of the instructional session. In going through the instructional materials, Sue did find one error. The F2 key activates drop down menus in PALS, not the F1 key as indicated in the instruction. Sue thought the instructional materials, especially the memory aid, would be very effective for the evening and weekend circulations staff. Sue and I discussed developing instruction for the other patron transactions that were identified during the analysis of needs and goals but were not included in this instruction. They are:

- renewing materials,
- displaying a patron record,
- removing a patron hold, and
- placing materials on hold.

Sue thought that the performance measures, instructional strategies, and instructional materials developed for this instruction would be easily translated to the other patron transactions.

Learner Evaluations

The Wegner Center evening and weekend circulation staff, for whom the instruction has been developed, consists of seven retired physicians and healthcare workers and volunteers. At the time formative evaluations were to be conducted on the instruction and instructional materials, only four of the seven were available. Therefore, the formative evaluations consisted of:

- two one-on-one evaluations, and
- a small group evaluation with two learners.

The one-on-one and small group evaluations were held in the Wegner Center computer classroom at computers configured identical the circulation desk computer, each with a bar code scanner. The instructional materials available included:

- a print out of the PowerPoint presentation of instruction that includes suggested scripting for the instructor,
- the following items for the learners to use during the instruction:
 - two completed Wegner Center library card request forms labeled 1 and 2,
 - two Wegner Center library cards,
 - two Wegner Center books,
 - a Wegner Center video, and
- a laminated memory aid.

Due to time limitations and difficulty in scheduling, the “live action” scenarios were not included in the formative evaluation process. A formal assessment tool was not developed because of the small number of learners participating in the formative evaluations.

One-on-One Evaluations

Lois P.

Lois P. has been working at the Wegner Center since it opened in January 1998. Her computer skills have improved greatly over the years but she is still extremely hesitant with computers. She has received training in the past from the circulation manager on how to load a patron record but has never successfully completed the process. Lois is successful at checking out patron materials although she often forgets to tell the patron the return date, place the return slip in the materials, and return the patron’s library card to them. Lois would be considered slightly below average in her ability.

Lois and I met first. I presented the instruction and instructional materials to Lois as if it were a training session; however, I frequently stop to ask additional questions about the clarity of the instruction and instructional materials. It took almost one hour to proceed through the instruction and instructional materials.

During the session, Lois and I did find several errors that needed to be corrected – most of them typographical or grammatical. As Sue had previously discovered, the F2 key activates drop down menus in PALS, not the F1 key as indicated in the instruction. Lois also pointed out that the instruction indicated that the patron circ class was on the lower right hand side of the Wegner Center library card request form when it was actually on the lower left hand of the Wegner Center library card request form.

Only one area was unclear to Lois in going through the instruction. Why were some fields skipped during the loading of the patron record? The instruction was not clear to her as to why fields were skipped, that the fields were optional and not selected by the Wegner Center to be completed. Lois was very interested in the way the circulation statistics were used by the various partner groups in reports and grant applications. She was glad that information was included in the instruction. Lois was delighted about the memory aid that could be kept at the circulation desk and quickly referred to during the loading of a patron record and the checking out of Wegner Center materials. Lois thought the instruction and instructional materials were very appropriate for the evening

and weekend circulation staff, but could also be used for the student staff. Lois felt that there was not too much information for the two hours allotted for the training.

Lois felt more confident about PALS following the instruction. Using the checklist previously developed as an assessment tool, Lois was able to load the Wegner Center library card request form #2 by herself with 100% accuracy using the memory aid.

Lois's biggest concern about the instruction was the inability to quickly see the fields that were being presented and discussed in the PowerPoint presentation. Although the data entry blocks were a light blue against a dark blue field, Lois had problems quickly finding them on the screen during the instruction. We spent some time playing with the PowerPoint presentation to see what could be added to help this problem. We experimented with arrows of different colors, highlighting the area, and animating the area. We finally settled on underlining the active data entry block with a wide white line. This showed up well when projected, as well as when the PowerPoint presentation was printed.

John D.

John D. has also been working at the Wegner Center since it opened in January 1998. His computer skills are above average. He has received training in the past from the circulation manager on how to load a patron record and has not been hesitant to use the PALS system and has somewhat mastered loading a patron record. However, he often loads patron records with less than 100% accuracy. John is very adept at checking out patron materials, although he often forgets to desensitize the books and videos. John would be considered slightly above average in his ability.

John and I met after my training session with Lois. I presented the instruction and instructional materials to John as if it were a training session; however, I frequently stopped to ask additional questions about the clarity of the instruction and instructional materials. It took just 40 minutes to proceed through the instruction and instructional materials.

John found the same errors Sue, Lois, and I had previously identified – the F2 key, circ class on the left rather than right, and typographical errors. John thought the materials were very clear, easy to follow, and presented in a step-by-step manner. He, like Lois, was very interested in how the circulation statistics were used by partner organizations. John was also very interested in the F1 help features and the F2 drop down menus that had never been pointed out to him before. He was also excited to know that dark blue screens were systems that allowed you to input and store information, and was slightly exasperated with himself that he had realized this. John thought the instruction did a very nice job of presenting what needed to be completed when loading a patron record and checking out Wegner Center materials as well as the why of the process. John liked the memory aid and thought that memory aids should be created for all the patron transactions at the circulation desk. John thought the instruction and instructional materials were perfect for the novice as well as the experienced computer user. The

screen shots provided the novice with the visual information they needed, while the text was organized well for the experienced computer user. John felt that the instruction could be easily completed in the two hours allotted for the training.

John, who was already confident about PALS, had a better understanding of the system and how it functioned following the instruction. Using the checklist previously developed as an assessment tool, John was able to load the Wegner Center library card request form #2 by himself with 100% accuracy. John did not use the memory aid.

Small Group Evaluation

Martha G. and Irene W. have both been working at the Wegner Center for fourteen months. Both Martha and Irene have slightly above average computer skills. They have not received training in how to load a patron record or how to check out materials to patrons. Martha and Irene do have experience checking in materials and have assisted at the circulation desk when other staff members have loaded a patron record or checked out materials to patrons. Martha and Irene would be considered slightly above average in their ability.

Martha and Irene were given a brief overview of the instruction and left alone in the Wegner Center computer classroom. Martha completed the instruction in 40 minutes. Irene completed the instruction in 50 minutes.

Afterwards, Martha, Irene, and I discussed the instruction and the instructional materials. I asked them the following questions:

- Did you find any errors in the instructional materials? Martha and Irene both identified the same errors that Sue, Lois, and John had previously identified.
- Was the instruction interesting? Martha and Irene both thought the instruction was interesting, especially the part about how the Wegner Center statistics were used by the partner organization. Now they realized why everyone kept after them to keep a record of the work they do at the Wegner Center – photocopies, phone calls, etc. All of that would yield statistics that could be utilized by the partner organizations. Another part of the instruction that was interesting was the way the PALS system let you know you were in a system that stores information by the color of the screen.
- Did you understand what you were supposed to learn? Martha and Irene both answered with a resounding yes. It was obvious from the beginning of the instruction what the purpose and goal of the instruction was.
- Were the instructional materials directly related to the objectives? Martha and Irene both answered yes. They found the instructional materials never veered from objectives. They liked the way the script kept referring back to the previous sections and reminding them of where they had been. This kept the objective always in the back of their minds as they proceeded through the instructional materials. Martha and Irene both liked the memory aid. Irene suggested the

memory aid be printed in a bright color so that it would be easy to find at the circulation desk.

- Were sufficient practice exercises included? Martha and Irene both felt that with the addition of the “live action” scenarios the day of training there would be sufficient practice exercises. If the instruction and instructional materials were to be self-study, additional Wegner Center library request forms for the learner to enter should be included.
- Were the practice exercises relevant? Martha and Irene both felt that the practice exercises were relevant. They thought that a student and a public patron provided enough of a difference so that all the fields in the PALS patron record were used.
- Was there anything unclear or vague about the instruction? Martha and Irene both indicated the instruction was clear and easy to follow.

Martha and Irene felt very confident about their ability to meet the two objectives following the instruction. Using the checklist previously developed as an assessment tool, Martha and Irene were able to load the Wegner Center library card request form #2 by themselves with 100% accuracy using the memory aid.

Revisions of Instruction

The instruction and instructional materials are appropriate for the learners based on the formative evaluations. However, several corrections need to be made to the instructional materials.

1. Corrections need to be made in the scripting to Slide 15 and Slide 18 in the PowerPoint presentation. These two slides incorrectly identify the F1 key as the key to activate drop down menus in PALS. F1 activates the help menus; F2 activates the drop down menus.
2. Corrections need to be made in the scripting to Slide 25. This slide incorrectly points the learner to the lower right hand side of the Wegner Center library request form for the circulation class information. The slide should point the learner to the lower left hand side of the Wegner Center library request form for the circulation class information.
3. Typographical and grammatical errors throughout the instructional materials need to be corrected.
4. White underlining needs to be added to the PowerPoint presentation in order for learners to quickly find the data entry blanks being discussed on the slide.