

## Request Management System Three Years On

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### Abstract

This article presents an update on NSLHD Libraries' journey with implementing the Reftracker customer management system amidst the challenges of the Covid-19 pandemic. Originally adopted just before the pandemic, Reftracker was integrated to streamline client requests and workflow, encompassing various forms such as literature searches, article and book requests, reference inquiries, and training consultations. Three years on, Reftracker has become an indispensable tool within NSLHD Libraries, deeply ingrained in both client interactions and internal operations. This article explores how Reftracker has facilitated evidence-based decision-making and enhanced teamwork within the library, reflecting on its evolution and impact post-Covid.

### Introduction

In December 2020 we published an article about NSLHD Libraries experience with implementing the Reftracker customer management system over the Covid pandemic period. This brief article is an update on the system and how we have embedded this within our work practice 3 years on.

Just prior to the start of the Covid pandemic NSLHD Libraries purchased Altarama's Reftracker to assist with client requests and workflow. Reftracker was originally setup with Client forms comprising of Literature Search requests, article and books requests, reference requests, training, and research consultations. The administration side included desk statistics, including daily head counts, marketing records including evaluation of the event or moment and training statistics.

After three years Reftracker has been fully embedded into our workflow for both clients and library staff and it has become important tool underpinning evidence-based decision making and teamwork within the library.

### Internal Task expansion

Internal tasks are those which clients aren't involved in but is important for staff workflow and engagement.

Since going live with the product, the team have been creative in how to use Refracker for recording information, enhancement of workflows and to assist with reminders of ongoing tasks, creating transparency and visibility to the team. Expanding on our marketing records in the initial phase of the project, additional internal tasks were added.

### *NSLHD Libraries Library guide workflow cycle*

Libguides take time to create and edit for NSLHD Libraries staff. To evaluate and keep track of time spent on the creation and maintenance of our 55 plus guides, we have an internal task in Refracker which provides allocation of the libguides to each team member. Guides are allocated to team members through Refracker's Internal Task feature which allows for the tracking of time spent working on guides, provides reminders when six monthly guide reviews are due, and ensures that this work is visible across the team. The library manager can then access a statistical dashboard to assist with decision making and analyse return on investment.

### *Generic tasks*

#### **Weeding**

With 5 physical library sites across the NSLHD and a sizable print collection of 8900 books, a project was put in place to ensure regular weeding was shared amongst the collection development team, alongside the acquisitions programme. This information is collated within an internal task so that time spent can be calculated and finished tasks can be reallocated, keeping the cycle visible for staff.

#### **Regular Work Health and Safety Hazard Management**

NSLHD Local Health District has a regular monthly schedule of specific workplace safety inspections. These have been allocated as Internal Refracker tasks to team members for completion, ensuring the workload is shared evenly and helping us comply with WHS requirements.

General ad hoc tasks including invoice follow up and overdue item follow up have also been entered into Refracker to ensure communication with stakeholders, clients and documents are kept within Refracker for auditing purposes.

#### **Document delivery and print holding reporting**

As with all hospital libraries – space is of a premium. Some years back, our collection of hard copy journals was discontinued, and a print journal consolidation project was undertaken to ensure that all legacy print journals came across to our flagship library – Douglas Piper Library at Royal North Shore Hospital. Print journals that were at other sites were investigated and decisions made on their benefit to the collection – including holdings within the Gratis network and availability through the National

Library of Australia. With the implementation of Reftracker, we worked with the provider, Altarama on enhancements to ensure that we could obtain information to make more informed decisions about the maintenance of the print collection and purchasing of online archives.

The document delivery officer notes information in the system on what has been used for document delivery for internal requests. For example, whether the request has been made via a paid supplier, through our Gratis network, or via our print collection.

Tracking this data in Reftracker provides us with evidence to make decisions about collection development, for example, deciding whether to purchase an online journal archive or whether a particular print journal can be withdrawn.

## **Macquarie Mental Health Library Case Study**

### *Quarterly reporting – stakeholders and marketing*

Macquarie Mental Health Hospital library has a service level agreement with NSLHD Libraries, operating as part of the NSLHD Libraries service but maintaining a separate reporting line to the MHDA Executive.

The Macquarie librarian can use reftracker independently to obtain statistics on the number and type of services delivered and analyse the effectiveness of marketing activities. Client feedback on literature searches is also available within Reftracker and provides an important source of qualitative evidence on the value of this service. The librarian can quickly access this data to pull together documentation for quarterly reports and accreditation.

### **Accreditation**

Reftracker houses comments, feedback, and ratings of service delivery. Reports are available when required to ascertain service quality, feedback, and the usefulness of library services for reporting to the Library Advisory Committee and for additional feedback at accreditation time.

### **Priority Search Implementation**

The Priority Search Service was launched on March 20, 2023, following a collaborative review and redesign of NSLHD Libraries literature search services. Library staff who would be providing the service were engaged in its design to ensure shared decision making and commitment to the final product. Development of marketing material and promotion upon the launch of the service was also a collaborative effort. Using Reftracker statistics analysis of marketing outreach, repeat client usage and information on how the service was used was garnered to create a

submission for the NSLHD Quality and Improvement awards 2024. Having Refracker made the application process straightforward for extracting data and downloading this into a usable format to submit the application.

### **What is in the pipeline?**

Further development using Altarama's strategy for our systematic reviews will give workflow tips to the librarian when conducting a systematic review. This will help guide the librarian to ensure information is provided to the client and provides guidelines for the librarian to ensure that library staff comply with the workflow set out.

### **What learnings?**

Updating work instructions and training materials are important for new staff who come on board.

It is important to regularly check data on a schedule to ensure that information is being correctly added. Particularly if a staff member is acting in a role that they may not be familiar with.

### **Refracker Enhances Teamwork and Prioritisation**

Refracker is a valuable tool that facilitates collaboration and work prioritisation across our large local health district team. Like many library teams, our staff includes both full-time and part-time employees. Refracker allows us to maintain an overview of the work allocated to each team member. When staff have other pressing duties, they can easily set their profile to indicate unavailability. This helps ensure work is prioritised and distributed evenly and effectively across the team.

Overall, Refracker has proven to be a powerful solution for enhancing teamwork, work prioritisation, and staff availability tracking within our large local health district. Refracker has continued to allow us to make evidence-based decision with data for collection management, service provision and return on investment for resources. It has also allowed us to provide flexible working options for library staff whilst still ensuring that work is completed in a timely manner.

### **References**

McKnight, K., & Nunn, B. (2020). These are not normal times... implementing a customer relations management system during a pandemic. *Journal of Health Information and Libraries Australasia*, 1(3), 13-18.

### **Acknowledgements**

The authors would like to acknowledge Bonnie Cheng, Librarian at NSLHD who provides ongoing support for NSLHD Libraries Refracker and develops forms for the team.