



# LIBRARY OPERATIONS GUIDE

June 2023

## Summary

This Guide provides an overview of the operations of an Ontario court house library.

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This Guide was prepared in collaboration with the Ontario Courthouse Libraries Association to assist new and existing employees in network. The Procedures are a *Guide only* and not binding but presented as a collaboration of the best practices. Practices may vary.

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This Operations Guide provides an overview of the Legal Information and Resource Network (LiRN) and the general library operations including compiled best practices. There is additional information provided to Library Staff under Secure portion of [LiRN.ca](#). There is a companion Introduction to LiRN Guide for Association Board Members.

## Executive Summary

LiRN supports Ontario county & district law associations by administering grants and providing strategic leadership, allowing libraries to provide up-to-date resources and services that meet the evolving needs of library users.

### Ontario's Courthouse Library Network

The 48 courthouse libraries function as a network, with individual libraries cooperating, sharing information and resources, and participating in centralized resources. Working together, the network is greater than the sum of the individual libraries and can provide better, more modern services across Ontario.

The 48 libraries are categorized as Regional, Area, and Local. Learn more about the network libraries on [LiRN's website](#), and see their locations on this customized [map](#).

### Making the Network Work

LiRN's role is to administer funding and provide strategic direction to the network. More information about the funding and budget process is [set out below](#). LiRN has developed and may continue to develop [policies \(available on our website\)](#) to provide clarity on library service offerings, grant administration, HR guidance, collection development, and more.

The Association's role in the network is to operate the library accordance with the guidelines and standards established by LiRN (see [LSO By-Law 13](#)).

### The Association as Employer

Library staff are integral to the individual libraries and to the network as a whole. As part of its role in operating the library, Associations employ library staff.

As with any employer, Association boards have responsibilities towards their employees. In the network [Library Staff Employment Guidelines](#) developed by LiRN, Associations are encouraged to, among other things:

- Determine adequate staffing levels
- Provide job descriptions, performance evaluations, and salary reviews
- Ensure staff have a supervisor (a board member or another staff member)
- Have in employment policies in place. [LiRN's Workplace Harassment and Violence Policy](#) and [Diversity and Inclusion Policy](#) can be used as a template. LiRN has a Leave of Absence Policy that can be used as a template once complete
- Ensure the proper completion of staff members' tasks, duties, and responsibilities

Sample HR documentation is available on LiRN's website.

Although the Associations are the employer, LiRN provides a centralized benefits program for library staff employees, taking advantage of the network structure to provide a plan that would not otherwise be available. More information on the benefits plan can be [found below](#).

Library staff have specialized skills that they have been trained for by their education and/or hours spent learning the intricacies of the job, and new Association board members may not be familiar with the tasks and duties executed by their employees. We have included a summary below.

#### *Summary of Library Staff Duties*

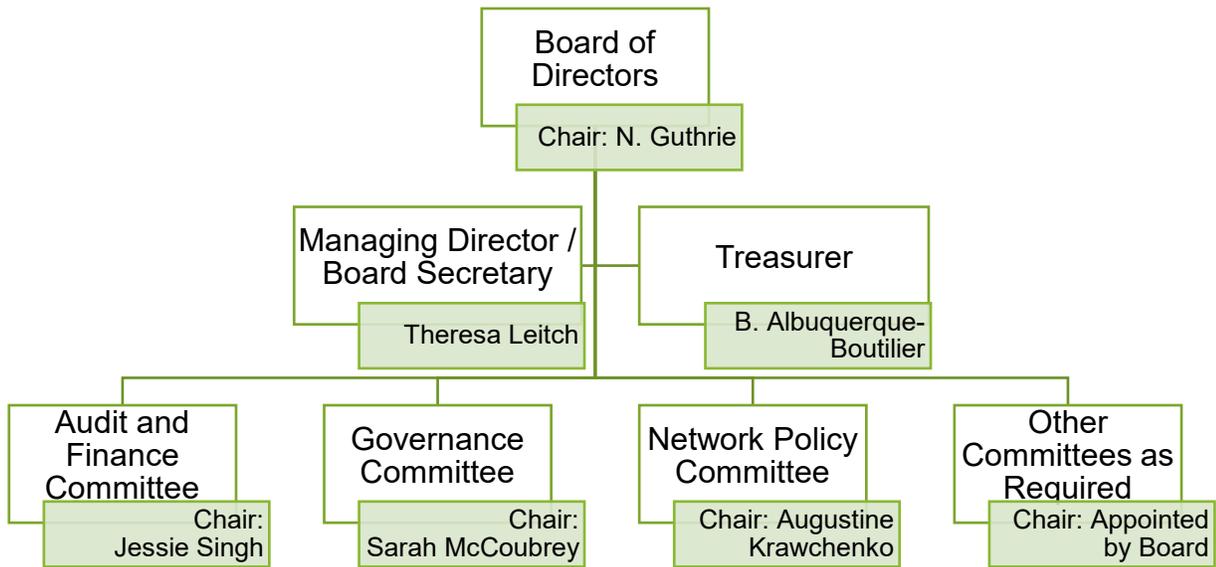
- Timely and accurate research and reference services.
- Instruction and support in using library resources, including the print collection, electronic resources, and library equipment.
- Managing borrowing privileges and interlibrary loans within network
- Collection Management and Maintenance
- Cataloguing
- Financial Administration such as annual budget preparation and providing quarterly trial balances
- Managing employees and executing HR responsibilities (where there is more than one Library employee)
- Library administrative tasks
- Library Promotion of services and resources
- Arranging CPD Replays if time and staffing permits
- Distributing current awareness content
- Library website development and maintenance if required
- Library social media management if required
- Library Training either ad hoc or orientation for new students, etc.

**LiRN allows up to 15% of library staff time to be used for Association duties, if time permits.** See a Detailed Explanation of this: [LiRN Additional Library Services and Responsibilities Policy](#)

LiRN has also created an *Orientation Manual for new Association Board Members* – see LiRN.ca for details.



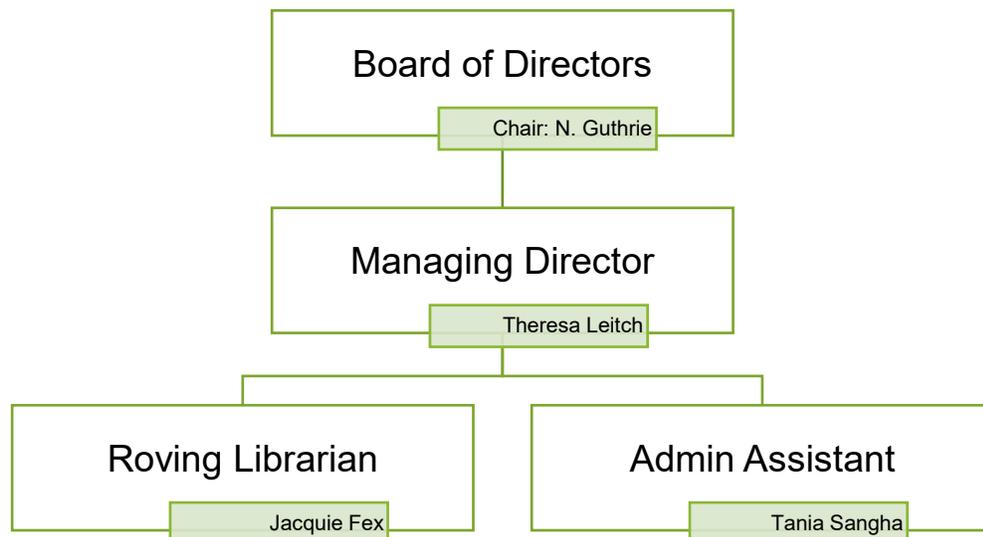
## Governance Chart



## Organizational Chart

### Key Objectives and Mandate

LiRN's general mandate is to evolve the provision of law library services and programs for the Ontario county & district law library system in an efficient and cost-effective manner through the management and allocation of grant funding, ongoing assessment of the system and strategic development of appropriate service offerings.



The [Unanimous Shareholder Agreement](#), dated on November 29<sup>th</sup>, 2019, sets out 4 key objectives for LiRN:

1. Facilitating the regulatory mandate to ensure that the public is served by lawyers and paralegals with high standards of learning and competence;
2. Supporting the ongoing learning and professional development of licensees, with a specific emphasis on the use and application of legal information, legal research and legal training content and activities;
3. Establishing a platform that provides access to information for all licensees; and
4. Considering the development of a supportive legal information services targeted to the needs of users.

#### LiRN's Skills-Based Board

LiRN's Board of Directors is tasked with achieving this objective. The Board consists of independent board members, externally recruited and vetted by a nominating committee comprised of individuals representing all three shareholders. It provides specified knowledge and skills that best support the future decision-making of the LiRN, based on a defined skills matrix.

Bios for the independent Board of Directors and LiRN staff can be found [here](#).

#### Strategic Plan

LiRN embarked on its strategic planning process in the fall of 2020. The Managing Director met with representatives of each of the libraries. We surveyed librarians for information about their libraries and for their thoughts on future-proofing the courthouse library system. We also surveyed members of the bar for their thoughts on libraries. We researched other courthouse library systems in Canada, with emphasis on British Columbia, Alberta, and Québec as the jurisdictions most like Ontario in size.

With the knowledge gained from these activities, informing the discussions, the Board participated in a blue-sky brainstorming session with representatives from the libraries, FOLA, and the LSO. That was followed by a facilitated Board discussion to home in on our strategic priorities. The Board shared early draft of the Strategic Plan with shareholders and took that feedback into account while finalizing the plan.

LiRN's Strategic Plan is grounded in four priorities:

1. LiRN is focused on the needs of courthouse library users, both now and in the future
2. LiRN supports libraries and librarians
3. LiRN collaborates with others working to provide legal information and library service prioritizing trust and respect
4. LiRN makes evidence-based decisions

A one-page overview of the plan can be found [here](#).

#### Legislative and Corporate Framework

LiRN is a not-for-profit subsidiary of the Law Society of Ontario (LSO).

The [Law Society Act, R.S.O. 1990, c. L.8](#) creates the LSO and provides by-law making authority that enables Convocation (the meeting of the LSO's governing body) to make by-laws — including the authority to make by-laws providing for and governing libraries.

[Law Society of Ontario By-Law 13](#), passed under the authority of the *Law Society Act*, requires the Law Society to create a corporation to fund county/district law libraries and provide, monitor and supervise law library services

and programs, including establishing policies and priorities for those services and programs based on the available financial resources.

LiRN was established pursuant to this By-Law.

LiRN's predecessor, LibraryCo Inc., was incorporated under the [Business Corporations Act, R.S.O. 1990, c. B.16](#) in 2001. The articles of incorporation were amended effective January 6, 2020 to change the name of the corporation to LiRN Inc. LiRN is therefore governed by the provisions of the Act.

LiRN has three shareholders:

- The Law Society of Ontario (100 common voting shares)
- The Federation of Ontario Law Associations (75 special shares)
- The Toronto Lawyers Association (25 shares)

## Financial Administration

LiRN is funded through a levy placed on lawyer licence fees by the Law Society of Ontario and is accountable for ensuring that the funds are used as intended: to provide law library services and programs to lawyers in Ontario. We are also charged with creating guidelines, standards, policies and priorities for the network. To do so, LiRN must have a solid understanding of how grant moneys are spent. This requires budget submissions to support library grants and regular financial reporting.

## The Association's Accountabilities and Responsibilities

### Budget Submissions

LiRN provides grants to Law Associations for the operation of libraries. Budget submissions, using the template provided by LiRN, explain and support grant requests. Budget submissions are due in late May / early June. The specific due date will be communicated during the first quarter of every year. Business cases are required for new expenses, expenses that have increased beyond what would be expected, and capital expenses.

In most cases, budgets are prepared by Library staff and approved by Association boards.

### Separate Operations

*Associations must identify and separate association operations from library operations and report on the library operational stream separately. LiRN grants should be accounted for as restricted for library purposes.*

### Required Financial Reporting: Quarterly Trial Balances

LiRN's grant from the Law Society of Ontario is a restricted fund that must be used for its purposes as set out in LSO By-Law 13 (including our operations and providing Law Associations funding to pay for the operation of libraries). The grants LiRN provides to Law Associations are also restricted funds that must be used for library purposes.

Law Associations are accountable to LiRN for how grant moneys are spent and LiRN is accountable to the LSO in turn. In accordance with advice from LiRN's Treasurer, our auditor and accounting best practices for non-profits, LiRN requires trial balance reports to meet this obligation.

A trial balance is a bookkeeping worksheet in which the balances of all ledgers are compiled into debit and credit account column with equal totals. These are easily generated with a few clicks from the accounting software used by most associations.

Trial balance are due two weeks after the end of each quarter.

## LiRN's Accountabilities and Responsibilities

### Budget Submissions

LiRN is required to provide regular reporting to the LSO on the utilization of grant funding received, including grants to Associations for library purposes.

LiRN must present an annual budget to the LSO. This budget currently contains 2 sections:

- Operational, which includes:
  - Grants to libraries.
  - Centralized services for libraries and library users.
  - LiRN Operations.
- Transitional, which includes funding for special projects.

Grants to libraries make up the bulk of LiRN's overall budget. We determine grant amounts as follows:

- Review budget submissions by Associations
- Budgets and business cases are reviewed by the Managing Director; grant amounts may be adjusted after review.
- [The Grant Administration Policy](#) states that Associations may retain up to 10% of the current year's grant in any fiscal year. If there is excess fund balance for the previous year, this may be taken into account in determining the grant.

The Managing Director also reviews and budgets for non-grant expenses, including identifying and costing projects for the upcoming year.

LiRN's budget is considered by our Audit and Finance Committee, usually in July, for review and guidance. The finalized budget is presented to our Audit and Finance Committee and Board for approval in late August.

Generally, the LSO's Audit and Finance Committee considers LiRN's budget in mid-September. It is then voted upon by Convocation, usually in October.

The Managing Director works closely with the Treasurer and her team throughout this process.

### Required Financial Reporting

LiRN is required to submit an annual report including audited financial statements to the LSO within 120 days after the end of each fiscal year. It must also submit quarterly financial reports during the fiscal year to the LSO.

## Association as Employer

As set out in LSO By-Law 13, s.8:

8(1) A county law library funded by the Corporation shall be operated by the association in accordance with any guidelines and standards established by the Corporation.

8(2) A county law library funded by the Corporation shall provide library services and programs in accordance with any guidelines, standards, policies and priorities established by the Corporation.

To operate the county law library, Associations employ library staff. Library staff salaries are funded by the LiRN grant.

Many Law Association employers have well-functioning employment practices in place. For those who require assistance in establishing these practices, LiRN has created the [Network Library Staff Employment Guidelines](#), [Sample HR Documentation](#), and provides centralized benefits for library staff.

How LiRN Supports Association Employers and Employees

Guidelines

The guidelines outline LiRN's expectations for employment best practices, including:

- Determining adequate staffing levels
- Providing job descriptions, performance evaluations, and salary reviews
- Ensuring staff have a supervisor (a board member or another staff member)
- Putting employment policies in place. [LiRN's Workplace Harassment and Violence Policy](#) and [Diversity and Inclusion Policy](#) can be used as a template. LiRN has a Leave of Absence Policy that can be used as a template once complete
- Ensuring the proper completion of staff members' tasks, duties, and responsibilities

*Sample HR documentation*

LiRN has also created sample HR documentation that includes:

- Sample Role Description Matrix
- Sample Salary Matrix
- Sample Library Staff Tasks
- Sample Staffing Levels and Opening Hours
- Sample Performance Management Documentation
- Sample Orientation Process for Employees
- [LiRN's Workplace Harassment and Violence Policy](#)
- [LiRN's Diversity and Inclusion Policy](#)

LiRN's Leave of Absence Policy is in development and will be added when complete.

We recommend using the Role Description and Salary matrices together to find the appropriate title and compensation for library staff. The list of Library Staff Tasks will help with this process by providing a deeper understanding of what the jobs entail.

## Benefits Overview

To assist Associations in providing staff of funded libraries access to long term disability benefits, LiRN has contracted for a group policy. For further clarity, this does not change the fact that the Law Associations are the employers of library staff.

Benefits are available to full and part time staff after three months of continuous employment. Part-time staff with employment of over 15 hours a week are also eligible.

Some associations have non-library staff enrolled in the benefits program. Invoices for the cost of these benefits are forwarded on a quarterly basis to be paid from Association funds.

Library staff benefits costs are accounted for in the LiRN quarterly grant.

Some associations have staff with a hybrid Association-Library role. In those cases, the cost of benefits is apportioned between the Association and Library.

Contact Information for Benefits Provider, Canada Life, is provided later in this booklet.

## The Distinction Between Association and Library

LiRN was established under LSO By-Law 13 to, among other things, provide funding to associations to pay for the operation of county/district law libraries funded by the Corporation. While running the libraries is a big part of the Association's work, there are many other activities and benefits that are purely for the Association's membership (social events and mentoring, for example). And, inevitably, there are activities that fall into a grey area with both Association and Library aspects.

The [Core Library Services and Management Responsibilities Policy](#) sets out the core library services that LiRN expects to be available in each Library and core library management responsibilities that LiRN expects to be executed to manage a Library.

The [Additional Library Services and Responsibilities Policy](#) brings some clarity between Library activities covered by the LiRN grant and Association activities. The purpose is to:

- Define library-related and association-related activities;
- Acknowledge that some activities may defy rigid classification as "library-related" and "association-related" and provide guidelines to determine where an activity falls on that spectrum;
- Confirm that the LiRN grant is intended to cover staff salaries only to the extent that the assigned activities are library-related, while facilitating the flexibility for Law Associations and Libraries to function as intended.

We encourage all Association Board members and Library Staff to review these, as well as other LiRN policies, in depth.

### Association Board Changes – Notify LiRN

Please notify LiRN with an email to the [admin@lirn.ca](mailto:admin@lirn.ca) email address when your President and/or Library chair changes. Please include their names and email address in your email.

# LiRN Policies

All LiRN Policies are available on the [LiRN](#) website.

Please review these Policies to become familiar with them.

## LiRN Internal Policies

**HR Policies** – *LiRN Policies can be used as a template for associations who do not have one.*

- [Workplace Harassment and Violence Policy](#)
- [Diversity and Inclusion Policy](#)
- [Conflict of Interest Policy](#)

## Finance Policies

- [Grant Administration Policy](#)

## Network Policies

- [Core Library Services and Management Policy](#)
- [Additional Library Services and Responsibilities Policy](#)
- [Network Library Staff Employment Guidelines](#)

## Professional Development

- LiRN [Professional Development Memo](#)
- The Associations are encouraged to support staff to attend the *Learn with LiRN* annual conference (Oct.) and the C.A.L.L. Conference (May) each year.

## Collections

- [Collection Development and Maintenance Policy](#)

## Medical/Dental Benefits

Visit [LiRN.ca](#) website for coverage information. The premiums are paid for by LiRN. See Guide for further information.

## Vacation Allowance / Personal Time

Varies from each Association due to hours of work, etc. Time off for appointments during work hours must be made up by the employee.

## Public Holidays

All staff members are entitled to statutory and civic holidays. Courthouse libraries are normally closed on holidays for which the Courthouse is closed such as Remembrance Day and Easter Monday, September 30 a federal statutory holiday, National Day for Truth and Reconciliation.

## Benefits Information

The benefits for county / district association library staff are administered by LiRN through the Law Society of Ontario. LiRN is not the employer of staff, but is contact for your Benefits.

CanadaLife is the carrier and their website is [www.canadalife.com](http://www.canadalife.com)

The benefits package can be accessed on the [LiRN](#) website – Library Staff – **Communications Chart**.

Benefits can be applied for by sending an email to [Carole Lanthier](mailto:Carole_Lanthier@aig.com) (Carole\_lanthier@aig.com) to request a new enrollment form to complete. Once completed, Carole will send you the link to register for the Canada Life portal which includes filing your claims online, direct deposit, etc.

Carole Lanthier  
Client Service Manager  
Group Benefits



Insurance | Risk Management | Consulting

Direct 613.691.1858  
Toll Free 888.720.2556  
[carole\\_lanthier@ajg.com](mailto:carole_lanthier@ajg.com)

**Gallagher Benefit Services (Canada) Group Inc.**

11 Holland Avenue, Suite 410, Ottawa, ON K1Y 4S1  
[www.ajg.com/ca](http://www.ajg.com/ca)

**David McCulloch** Pronouns: (he/him/his) *Why I declare my pronouns*

Area Senior Vice President, Group Benefits & Retirement Services  
Gallagher Benefit Services (Canada), Inc.

D 613.691.1859  
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11 Holland Avenue, Suite 410, Ottawa, ON K1Y 4S1 [www.ajgcanada.com](http://www.ajgcanada.com)

## Library General Duties Overview

*These are provided as a guide, they are not exhaustive and will vary for each library.*

### Daily Duties

- Collect Mail – this can be external mailbox or within the courthouse
- Walk around library and collect books to put on cart, Shelve books
- Record statistics of library use for LiRN and if you monitor these for your own association
- Loose-leaf filing of updates into textbooks
- Does your Association expect you to provide Daily dockets? (not a library task)

[Daily court lists for the Superior Court of Justice & Ontario Court of Justice.](#)

The Daily Court List includes the case name, time, room number, and reason for the court appearance.

### Monthly Duties

- Pay Source Deduction Remittance to Receiver General (Canada Revenue Agency) by the 15<sup>th</sup> (*can also pay quarterly*) and WSIB
- Pay Bills and do Bank Reconciliations
- Bill for photocopying services (*if applicable*)
- Check for overdue books and recall them where appropriate
- Loose-leaf filing of updates into textbooks

### Quarterly Duties

- Report Library financial reports to LiRN: [admin@lirn.ca](mailto:admin@lirn.ca)
- Input Quarterly Grant amount into Sage accounting software / other accounting software
- Email Statistics Report to LiRN: [admin@lirn.ca](mailto:admin@lirn.ca)

### Annual Procedures

- Summer – Inventory of the collection. Request shelf list by [CatDept@lso.ca](mailto:CatDept@lso.ca) at Great Library Cataloguing Dept. for shelf list of all books in the library collection
  - withdraw older LSO CPD binders (keep current year only on the shelf).
- December/January – Year End Accounting
- Website – clear “New Acquisitions” list (if applicable)
- Create new Statistics sheet for upcoming year
- Order library supplies – Brodart (pockets, cards, spine labels & label protectors) when needed
- T2 form to be completed – if applicable for your Library/Association (*refer to “Financial Procedures” section for details*)
- Update those who have signing authority with the bank as well as the CRA if applicable

### Banking

Banking should be done by the last day of the month to ensure that the account is credited in that month with the exception of when memberships come in. Use judgement and do banking weekly if necessary. The person doing the banking may need one hour to ensure that it is done during working hours.

## Budget Submissions and Reporting to LiRN

LiRN is funded through a levy placed on lawyer licence fees by the Law Society of Ontario and is accountable for ensuring that the funds are used as intended: to provide law library services and programs to lawyers in Ontario. To do so, LiRN requires budget submissions to support the annual grant requested. We must also have a solid understanding of how grant moneys are spent, requiring consistent use of the Chart of Accounts and quarterly Trial Balance reports.

### Budget Template

LiRN provides grants to Law Associations for the operation of libraries. The budget submissions explain and support grant requests. Occasionally, additional detail is required to support the request. In those instances, a business case should also be submitted. This template is available on the secured content area of our website under [Budget Submissions and Reporting](#).

Please review the following Budget Explainer for details: [2024 Budget Process and Financial Reporting Explainer](#).

**Budgets are due on June 1 every year.**

Key Budget Preparation and Reporting Documents

**Please review the following documents on LiRN.ca Secure Content:**

- [Budget Template and Explainer](#)
- [Business Case Template](#)
- [Chart of Accounts List and Explainer](#)

### Trial Balances

A trial balance is a bookkeeping worksheet in which the balances of all ledgers are compiled into debit and credit account column with equal totals. These are easily generated with a few clicks from the accounting software (i.e. Sage) used by most associations. Trial balance are due two weeks after the end of the quarter.

Due dates for Trial Balances in 2023:

- 2022 Q4: January 23
- 2023 Q1: April 24
- 2023 Q2: July 24
- 2023 Q3: October 23

### Chart of Accounts

The Chart of Accounts sets out the GL (General Ledger) accounts used in the network library system of accounting. All libraries must use the same standard set of accounts, using the same set of account numbers. Consistency across the network is important for accurate accounting and reporting and allows LiRN to track trends in spending that can help provide data supporting LiRN's budget requests to its funder. It is on the LiRN website (see above).

## Statistics

LiRN requires county & district libraries to keep statistics to provide the data of their library activities which they must report to LiRN on a Quarterly basis. LiRN compiles this data into reports for our Board and then for our [annual report](#) to our shareholders including the LSO, FOLA and TLA.

LiRN requests information about book usage, ILLs (interlibrary loans such as borrowing a book from another library or vice versa), how many requests you get (email, phone or in person) for library or equipment related help or research, any CPD sessions you help coordinate, any training you might do on library resources or help to coordinate with our vendors. One important criteria is any client feedback that you receive which helps us tell a story of how vital you are to the library's usage. We do not require you to report on all your activities in the library (this is NOT docketing) only these selected items which our fund provider is interested in.

### Statistics gathered include:

- Circulation of print materials
- Interlibrary loans (books shared between libraries)
- Usage of electronic resource subscriptions that they may have outside of [eLiRN](#)
- Research time & services provided by Library staff
- Current awareness news circulated (if applicable)
- Library training including vendor training arranged for staff and lawyers (if applicable)
- CPD delivered by Library staff including preparation time and # of attendees
- Client feedback on your activities

### LiRN and Library Reporting Requirements on LiRN.ca

#### Quarterly Deadlines:

Q1: Jan. 1 - March 31-- Deadline April 7

Q2: April 1 – June 30 -- Deadline July 7

Q3: July 1 – Sept. 30 -- Deadline Oct. 7

Q4: Oct. 1 – Dec. 31 -- Deadline Jan. 7

At the end of each Quarter, library staff are expected to compile their data into an Excel Quarterly Statistics Form provided by LiRN. This Form is available on the [LiRN Library Reporting Requirements](#). Also available there are PowerPoint instructions. Other helpful information is also available there.

Send the completed Statistics Reporting Form in Excel to: [admin@lirn.ca](mailto:admin@lirn.ca)

**Please include your County /District Name on your Excel Spreadsheet, File Name and in the subject line of your email.** Example: Lanark 2023 Q1 Stats

### LiRN Quarterly Statistics Form

[Quarterly Stats Form](#) (Legal size paper)

Please include your County /District Name on Stats Form, Excel File and Email Subject line.

[Power point instructions for Quarterly Stats Form](#)

## Collection Development

### [LiRN Collection Development Policy](#)

Library staff working in individual libraries across the network are best placed to determine the needs of their library users. LiRN relies on the library staff's professional judgement in deciding whether to acquire new materials or to continue paying for existing materials. The Policy covers:

- Assessment of Purchases
- Retention and Deselection
- Donations
- Archival materials for the association

### Core List of Titles

OCLA's [Core Titles List](#) is a collection development tool intended to be used by all courthouse libraries with the belief that a courthouse library should be able to help lawyers and other law professionals find information, no matter the size of the library or the area of law being researched.

The List is comprehensive and contains the best titles in every area of Canadian law. **The List integrates both print and electronic resources** available on eLiRN.

### Avoid Duplication of Key Print Titles now available on eLiRN

- LexisNexis Quicklaw has textbooks published by LexisNexis & *Halsbury's Laws of Canada*
- Westlaw have the key loose-leafs texts in the Criminal, Family and Estates & Trusts areas
- *Essentials of Canadian Law* series by Irwin Law (over 150 titles) on vlex

Your budget dollars will stretch further if you do not purchase the hard copy of these materials.

### To Order books

Please google the title to see who is the publisher and contact them to place your order. Most titles fall under Thomson Reuters, LexisNexis and Irwin Law. Please see the page in the Guide for [Publisher & Vendor Contacts](#).

### LSO CPD courses

The LSO provides free binders of the majority of their Continuing Professional Development (CPD) courses that they offer, to the Courthouse libraries. These are a great resource for your lawyers to learn about new trends in law as well as good practice tips from experts in their field. **LiRN recommends that you keep the current year only in your print collection.** All CPD course materials are available on the [Infolocate](#) – CPD: [AccessCLE](#).

### Useful Collection Tips

- Some counties offer their discards to other libraries in the network. If you have discards to offer, put a deadline of at least a week to claim as to ensure that part-time libraries will have an equal opportunity to take them off your hands.
- Use your collection funds wisely. You cannot be expected to have everything on hand but you should be able to borrow anything you need. Use Inter-library loans and CanPar to ship them.
- Never be afraid to send things back to the publisher - including releases. Contact your Print rep to tell them that you will be sending it back and to cancel. Ask for a discount, or for multiple items to be shipped together to try and save shipping & handling costs.

## Organization of your Library Collection

The textbooks and CPD materials are arranged by a subject classification system called [KF Modified](#) which originated from the Library of Congress (US). KF stands for Canadian Law so most titles in your collection fall under KF. It is different from the Dewey Decimal system that is used in public libraries.

Books arranged by subject broken down into a numeric order which makes it easy for a lawyer to go to one area to find several titles on one topic. Often a book can encompass more than one subject so the most prevalent subject is the deciding factor for where a book is placed. The other topics are captured in the online catalogue as subject headings (defined key terms / phrases) that users can use to search.

### InfoLocate and the Great Library

The online catalogue is called [InfoLocate](#) and has all the county locations in one central catalogue as well as the Great Library's collection. Search for books, journals, Law Society CPD articles, [HeinOnline](#), and web pages. You can select your county holdings on the upper right. [How to use InfoLocate – Research 101](#). Contact the [RefStaff](#) at the Great Library for assistance with finding items not in your collection or research help.

[Advocat](#) is also available when you wish to search to see who has the most recent loose-leaf edition.

### Law Reports

Your Library will also contain large series of reporters such as the *Ontario Reports (O.R.)*, *Dominion Law Reports (DLR)* or topical reporters such as *Business Law Reports*, etc. Law Reporters are collection of cases that include [Headnotes](#) which is a summary of the points of law in the case.

These cases are now largely available on online sources such as CanLII, Quicklaw, Westlaw and vlex. Even older, historical cases are usually available online. The use of these law reports in print is largely discontinued and the value of the books has also diminished to \$0 in case you wanted to sell them.

#### Paper Parts

If it is a reporter where paper parts are received before eventually being replaced by a bound volume, you should discard the paper parts when you receive the corresponding bound volume

[List of Abbreviations for Canadian Law Reports and Judgements](#)

### Citation of law reports, journals, etc.

[Case](#) citation serves two functions: first, citation allows the reader to *find* the decision, journal, statute, rule. Citation provides a road map that directs the reader to where to locate the law. [Queen U's Guide to legal citation](#) & [Citation of law reports in the Ontario Court of Appeal](#) are both good guides for how to cite.

### Journals / Serials / Periodicals

Journals are generally published by the University Law Schools and are also available electronically on Quicklaw, Westlaw, etc. They are often unclassified and arranged alphabetically as part of your collection.

## Alphabetical List of Topics – KF Classification System

Topic	KF	Topic	KF
Aboriginal Law	8205	Human Rights	4483 .C5
Administrative Law	5402	Immigration	4483 .I5
Advocacy	8915	Impaired Driving	2231
Agency	1345	Income Tax	6334
Banking	974	Injunctions	9014
Bankruptcy	1536 .ZA2	Insurance Law	1164
Cannabis	3891	Labour Law	3320
Charter of Rights	4483 .C518	Landlord and Tenant	590
Children	479	Legal Ethics	306
Civil Procedure	8816	Legal Profession	297
Commercial Law	889	Legal Research & Writing	240-245
Commercial Leases	593 .C6	Libel and Slander	1266
Computer Law	390.5 .C6	Limitations of Actions	8881
Condominium Law	581	Mortgages	695
Conflict of Laws	411	Motor Vehicle Law	2209
Constitutional Law	4482	Municipal Law	5304
Construction Liens	900	Nonprofit Corporations	1388
Contracts	801	Partnership	1375
Copyright	2994	Patents	3114
Corporation Law	1415	Pensions	3510
Costs	8995	Personal Injury	1257
Criminal Law	9220	Personal Property Security	1050
Criminal Procedure	9620	Planning Law	5698
Damages	446; 836; 1250	Privacy	1262, 5753
Debtor and Creditor	1536 .ZB3	Products Liability	1296
Defamation	1266	Provincial Offences	9620 .ZB3
Divorce	535	Real Property	570
Drug Offences	3890	Sale of Goods	915
E-Commerce	889	Small Claims	8769
Education Law	4119	Statutory Interpretation	425
Employment Law	3455	Torts	1250
Environmental Law	3775	Trademarks	3180
Evidence-Civil	8935	Trusts	730
Evidence-Criminal	9660	Wills & Estates	755
Family Law	505	Wrongful Dismissal	3471
Franchising	2023	Youth Criminal Justice	9780

## CPD Publications from the LSO

aka the Binders

Law Society provides the majority of their Continuing Professional Development (CPD) course binders to LiRN libraries. They are paid for by LiRN and are sent automatically to the County and District Libraries.

These are a great resource for your lawyers to learn about new trends in law as well as good practice tips from experts in their field.

They are automatically entered into InfoLocate by the Great Library so no submission is required by you. Each one is accompanied by a packing slip which you should check to verify that you have received the correct publication.

While you do not need to report CPD binders as a new title, the withdrawal of these items does need to be reported using the [Form for Reporting Withdrawals](#).

### All Contents available on InfoLocate

LiRN recommends that you keep the current year only in your print collection. The rest of the courses as well as courses that you do not automatically receive **are available on the Infolocate website** from the Great Library: <https://lso.ca/great-library> Select CPD to search or browse the entire collection of CPD articles from their courses.

**AccessCLE** (Browse CPD) was created for the county/district collection so that you can retrieve just a chapter from a CPD title. Access CLE holdings have PDFs of CPD/CLE materials dating back to 2004 - present.

### Labels for binders

Zdravka Terzic (LSO) regularly sends the catalogue call numbers via email for all LSO CPD binders. Some assembly is required for these publications.

Insert the spine label and front cover into the plastic pockets on the outside of the binder BEFORE putting the pages inside (easier to do when binder is empty). (They can be trimmed to make them easier to insert.) As in the case of new books, apply the marks of ownership right away. Since we have a card-based circulation (lending) system, you will also need to make labels for the book cards and pockets and apply them to the inside front cover. As the pockets do not stick well to plastic, it is a good idea to reinforce them with some wide tape.

### LSO Contact for CPD publications

Manager for Marketing and Customer Service:

Elodie Millican

[emillica@lso.ca](mailto:emillica@lso.ca)

## Loose-leafs

A loose-leaf binder has pages (leaves) secured in book binder format with a cover whose spine may be opened for adding, arranging, or removing pages when new information is available such as new cases, rules, legislation, forms, news, etc. Loose-leafs are updated monthly, quarterly, annually or on an ad-hoc basis. The cost to maintain many of these loose-leafs is high in terms of both the cost to purchase and from the labour involved for you to remove the old pages and insert the new ones.

Many of these titles are now available on the [eLiRN Suite of Resources](#) on the lawyer terminals. Use of these resources online is encouraged so lawyers can use them and download/print any useful information rather than removing them from the library collection since they are so popular. Check the [OCLA Core List](#) to see what titles are available in print & electronic on ELiRN.

### Thomson Reuters Loose-leafs: The 3 Year Rule

Historically Thomson would allow you to purchase the contents of a looseleaf text on an annual basis. They now allow a library to purchase a previously canceled publication every three years. This will allow you to keep a publication fairly current (3-year cycle) and interlibrary loan/scan of a more current section if required. Ensure that you take advantage of the 2 free months of updates and that you cancel the publication before they start to invoice for payment. If ordered within the 3 year period, TR will bill for the entire three years of updates.

The InfoLocate catalogue will need to be updated with the new currency date so that all will be aware of the most current versions. It is also useful to have a spine label on these editions that denote currency, for ease of use.

### Proview - Westlaw's electronic platform for their loose-leafs

Proview is the current platform for the WL/TR titles in an electronic format. It is included with your print subscription to a title. There is a slight cost difference for just print and the online component.

### [Guide to using Proview](#) (WL)

### Lexis Loose-leafs

Lexis offers the County & District libraries a 40% discount on their loose-leaf collection. This offer may not always be available. Your LexisNexis rep will also be able to send you an annual list of what your library has historically kept updated with an annual contents purchase.

### Useful Collection Tips for Loose-leafs

- It is very important when updating a book's contents to make sure you have received the previous one. (For example, if you are recording 2021-3, and the previous release listed is 2021-1, this is a warning that you may not have received 2021-2 and you should check into this.)
- Cross out each filing instructions page as completed to help you to keep track of where you are.
- Write "Filed" and the date on the page entitled "An Update has Arrived..." and place in very front of first volume. Discard any extraneous pages in recycling bin.
- Releases for loose-leaf publications *may be* recorded as received in an Excel spreadsheet "Logging Filing" in "New Books Processing".
- Let your members know if your publication is not up to date but also let them know that you can get them updated information. Use bright labels affixed to the books if the book is cancelled and the date it was.
- Use your Thomson Reuters MyAccount to see what you are ordering on an annual basis and to see the cost of your loose-leaf subscriptions. This information can be used to justify making changes such as cancellation or 3-year purchase and moving to only available on Source products.

## Periodicals aka Journals aka Serials

### What are Serials aka Periodicals aka Journals?

A general term describing publications such as magazines, newspapers, journals, annual (annual consolidations, annotated annual books) and periodicals. Something that is ongoing. Also includes loose-leaf titles since they are updated on a regular basis and not like a bound textbook.

### What to Report to Great Library for Serials

- Every new serial / journal / periodical title you receive (your **Holdings**)
- Titles already reported for which holdings information has changed:
  - Retention policy has changed, e.g., Library keeps current year only changed to Library keeps last two years only
  - Subscription has been cancelled but holdings have been retained, e.g., Library subscription cancelled with v. 12 (2006); Library subscription cancelled with rel. 4 (Dec. 2009)
  - Updating methods have changed, e.g., Library updates contents annually changed to Library updates contents biannually
  - Additional copies of titles already reported (could be a text or serial)

### What Not to Report

- Subsequent issues of serials already reported, including titles for which you have reported retention or updating policies, e.g., Library keeps current year only; Library updates contents periodically
- Subsequent volumes of loose-leaf publications already reported
- Updates and supplements of titles already reported, e.g., loose-leaf releases, pocket parts, special pamphlets, CD-ROMs, DVDs

### Processing Notes

Most periodicals are not classified. When a new issue is received, all you may have to do is record it in spreadsheet (organized by title), apply your marks of ownership and shelve it. (If you have a card-based circulation system, you will also make a label for the book card and pocket and insert the pocket in the volume. The label should identify the volume by title and volume number and/or date.)

Periodicals are usually shelved alphabetically by title, and then by volume number.

## Cataloguing & Processing Procedures

The Great Library of the LSO provides catalogue records for all county/district library collections. The procedures & Manual to submit new titles to this central catalogue are located on [their website](#):

### Cataloguing Manual from the Great Library

[Cataloguing Request Manual for County & District Law Libraries](#)

### Online County & District Law Library Reporting Forms

Two online reporting forms are available for the submission of cataloguing requests by county and district law libraries in Ontario. One is for **New Books received: Monographs**, the other to remove an item from the catalogue: Withdrawals. NOTE: ISBN are a book's serial number found on the back of the title page. **Holdings** are when a book has multiple volumes or years.

- [Form for Reporting Monographs & Serials -- NEW BOOKS](#)
- [Form for Reporting Withdrawals - Books no longer in collection](#)

### Support Documents for County & District Law Libraries

- [KF Modified Classification Guide](#)
- [Creating Persistent Links to Advocat Catalogue Records or Searches](#)

### Contact Information

Cataloguing Dept. of the Great Library, Library Systems and Technical Services Department: [CatDept@lso.ca](mailto:CatDept@lso.ca).

MARC records for the vlex series *Essentials in Canadian Law* can be found under Tools for Librarians on the vlex website. You can download marc records for library items such as books, journals, just Irwin law books, etc. to incorporate into your own library catalogue. Here's the link: <https://ca.vlex.com/resources/librarian>

### Withdrawals

All withdrawn material, including older editions of textbooks, must be reported to the cataloguing department of the LSO Great Library by using the online [Form for Reporting Withdrawals](#).

This can be done as part of your annual inventory review. If there is a large number of withdrawals, please provide the titles in an Excel spreadsheet to be emailed to [CatDept@lso.ca](mailto:CatDept@lso.ca) to make it easier for everyone involved. More on the physical part of the withdrawal process later in this Guide.

### Inventory

It is recommended that you conduct an annual/biannual inventory of the text collection by requesting a Shelf list generated by the Cat Dept. This shelf list provides a list of all books in your collection in their classified order, the order of the books on the shelves. Compare this shelf list with which books are on the shelf. Check which books are circulating/signed out. Report any discrepancies to [CatDept@lso.ca](mailto:CatDept@lso.ca), ideally using an excel spreadsheet if there are many changes.

## New Books

### What to Report to Great Library

- Every new title (book) or multipart title you receive
- New editions, e.g., 3rd ed.; Rev. ed.; 2008 ed.
- Additional copies of titles already reported
- New volumes such as when a loose-leaf expands
- Use [Form for Reporting Monographs/Serials](#)
- Use the book's serial number: ISBN which can be found on the back of the title page.

### What Not to Report

- LSO CPD materials (Your library holdings will automatically be added to the database.)
- Supplements of titles already reported, e.g., pocket parts, pamphlets, CD-ROMs, DVDs

### Standing Order

A Standing Order is when a publisher has a record to send to you any new edition of a book. Most commonly used for annual consolidations or annual annotation books.

- You may wish to contact the print publishers to see what is on standing order for your Association.
- If it is a book on standing order, record the fact that it has been received, and the date, on the Excel spreadsheet called "Logging New Books" (*if applicable*).
- Check the [InfoLocate](#) record, which may say something like, "Library keeps 2 years only."
- Use this entry for printing the spine, card, and pocket labels (see below).
- Discard previous edition or donate it to another library.
- Place on "New Books" shelves or directly into stacks.
- Enter new books on Association website under "YEAR Acquisitions." *If applicable.*

### Printing Spine, Card & Pocket Labels

- It is most efficient to print a batch of labels at the same time, if possible.
- Copy and paste spine label info from LSO cataloguing dept. email or from online catalogue. Print the spine label on sheet (**Brodart # 55 459 001**).
- For circulating materials, print 2 copies of the bar code label on **Avery Template 5160/8160** for book front and card. Put the spine label on the book 5mm from bottom and cover it with a label protector.
- *Peterborough County LA* has created an excel spreadsheet for labels with templates that you may wish to contact them to use.

## Withdrawals / Discards

Suggestions regarding Withdrawals of titles and books in your library from your OCLA colleagues.

## LSO CPD publications

LSO CPD materials are available electronically via the [GL Catalogue, Select CPD](#)

To browse by individual chapters, click on [Browse by Topic to go to AccessCLE](#).

CPD are great topical materials and a good place to start your research. Keep just the current year of CPD titles on the shelf or if it is the only one of its kind. Sometimes it is just easier for the lawyers to browse through and see what is in the publication rather than try to find something online. They can sign out the book or you can offer to email them similar articles from current, online edition. For older CPDs that you want to withdraw, you could offer them to the lawyers. Some libraries have a specified area for Discards and put up a “Free to good home” sign.

### Older textbooks, annotated / consolidated statutes / rules

Generally it is best to just keep the current and only the previous year in your collection. Sometimes new lawyers in your association may like it to have a copy if you are discarding it. If you have an area for Discards, perhaps a sign saying: “Free to good home” discards. Send a notice to your membership that you are giving free books away on a certain day if that works for you but this is not necessary.

### OCLA Discards of Texts / Loose-leafs

For some textbooks – if it is a really expensive, old one or one that is not generally found in the system, along with old looseleafs, it may be offered it to other libraries in OCLA. The thought is that it is better to have something slightly old than nothing at all. Periodically someone will send out a list to the OCLA staff group bi-monthly and if there is a request by more than one library, they will do a random draw to ensure that everyone is given an opportunity with about a 2 week time frame for responding as not everybody works full time. They will send the books as a non returnable interlibrary loan.

### Physical Discard of Books

Looseleaf binders go in the garbage, contents without plastic tabs can go in recycling.

Hard cover books, cut the hard covers off, the contents can go in the paper recycling.

Old Reporters. It may be best to hire a student for a couple of hours or get a co-op student if you have lots of other work for them to do. If your Board thinks that someone will pay for your reporting series, please advise them that you have learned that this is not true. You will be hard pressed to give those away even for free and never offer to ship at your expense.

Please give your cleaners some notice to bring a bin on wheels to the library and extra garbage bags. Please cut covers off and bag them and put all the paper that could be recycled in the bin. Alternatively ask your building maintenance person. They will appreciate the notice since it will create a lot of extra work for them so please be considerate of their time and effort.

## Law Library Access

Can non-association members access the resources Courthouse libraries?

The **LSO's By-Law 13** mandates it to create LiRN and states that:

- “A county law library funded by the Corporation shall give access to its law library services and programs to (a) every person licensed to practice law in Ontario as a barrister and solicitor, regardless of whether the person is also a member of an Association; (b) judges of Ontario courts; (c) Ontario justices of the peace; and (d) members of boards, commissions or other tribunals established or provided for under Acts of Parliament or the Legislature in Ontario.”

Association Rules for Access to the Library may vary:

- Access to the Library is during staffed hours for visiting counsel, students at law (not articling), paralegals who have paid library use fee.
- Access to lounge is for lawyers, students at law, articling students.
- No lounge access for paralegals.
- Some libraries have access cards which allow their lawyers to access the library 24/7.

## Circulation Procedures / Policies

**Suggested Best Practices from other Counties – individual libraries may develop their own Circulation policies.**

- Only members can borrow books for office/home use.
- Visiting counsel / Crown / Judicial clerks can use in library.
- Fines – some libraries have fines in place for overdue materials
- Books which circulate contain cards and pockets.
- Every month check for overdue books and email borrower.
- After yearly inventory in summer, email patrons for very overdue books.

An Example Circulation Policy is attached in the Appendix E for some guidance if you do not have a Circulation Policy in place. Please check with your Association in case they have some suggestions on what they would like to see in the library. LiRN does not have a set Circulation Policy. Our thanks to Northumberland County Law Association for sharing their Policy in Appendix E as a sample template for others to follow.

### Loan Period (Suggested Guidelines)

- Books may be signed out for 3 weeks at a time. Books marked with a “Library Use Only” sticker are considered non-circulating and cannot be removed from the library. Special arrangements may be made with the Librarian for the removal of non-circulating items, on a case-by-case basis. Interlibrary loans are due the date indicated by the lending library. There is no limit on the amount of books which can be signed out at a time.
- **Loose-leaf textbooks** are often highly expensive and highly used. Some libraries do not circulate these materials or place short-term loan periods. Many loose-leafs are now part of the ESuite which lawyers can access from the library terminals and then print or download for their use.

### Lost or Damaged Materials – Replacement Costs

If materials are damaged and judged by the library as being unsuitable for the collection, the patron must pay the replacement cost. A notice of these charges will be sent to the borrower. Damage does not include the cumulative wear and tear that occurs through normal use.

If an item is being recalled by the Library, but the patron that signed it out cannot locate it, it is considered lost by the Library. The patron will be expected to pay the replacement cost for the item. If a lost item is found before the fine is processed, the payment may be returned to the patron. If the item is found after the fine has been processed, the payment is not refunded as the administrative, processing and replacement costs have already been incurred.

### Confidentiality

The Library respects the privacy of individuals and will safeguard their personal information and research requests. Library staff will not discuss reading tastes, or items borrowed by library patrons with third parties, as per the Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c. M.56. Information may only be released to another individual or organization upon written consent from the patron. The written notification must be dated and include the name to which the information is to be released and the specific information that is to be released.

## Interlibrary Loans (ILL)

The LiRN network of county libraries often share their resources amongst each other when someone needs a book that they do not have in their collection. This process is called Interlibrary loans.

### If you are Requesting articles / books for Lawyers:

Articles – Please have ready title, pages, publication, year, etc. and call or email library holding the publication. Use [InfoLocate](#) to find another county that might have the book or if it might be available on HeinOnline which has links to thousands of law journals in [InfoLocate](#).

Books – Call or email library holding book. Try larger & closest first. Great Library also lends, but leave as last choice. Use [Document Delivery](#) on Great Library's website to request.

### Distributing Articles or Books to lawyers:

Scan and send articles directly from photocopier (*if applicable*)

- Enter card code (general library code or from your card) using keypad
- Click Scan to Email, Address Book select email of staff member, change title > Start. (Send from your library email to requesting library to prevent junk mail on receiving end)
- When copier is done, click Cancel (if more jobs click OK).

### Courier Information for ILLs

Canpar courier charges are paid for by LiRN for ILLs.

### Canpar/Purolator Instructions

- Go to: <http://www.canpar.com>, and click "GO" beside Collect Services  
**Shipper Number: 42000144 | Password: Libraryco1**
- Most of the County/district library addresses appear in the address book; double click the address desired and it will populate the delivery fields
- Fill in your email address to ensure that Canpar emails you the tracking number
- Fill in weight (in kg), length, width and height (in inches), set insurance to \$100.00
- Click the "Ship" button and follow the prompts to print the shipping label
- Take the package to the court office and leave it on the shelf for pick up (if applicable to your location)
- Canpar is to be contacted before noon for pickup that day (this is the preferred Courier). After noon, Purolator is used if it is required the next day or for non-LiRN business.
- Ship > I Agree > Confirm > OK (to print) > 1 copy > Close (Do not need to log out.)  
To CANCEL shipment click link in confirmation email & will immediately cancel the pickup

Purolator (if necessary). Login using:

For ILLs: Username: xxxxxx Password: xxxxx (acct # 0199.... Should fill in automatically)

## Electronic Resources available in Library aka ELiRN

LiRN has negotiated an [eSuite of Electronic Resources \(ELiRN\)](#) that are available for all lawyers on terminals in courthouse libraries in Ontario. They do not have to be members to access these resources. Library Staff have remote access for all of the eLiRN resources with unique passwords and can conduct research for their lawyers and send the results to them.

Remote access is preferred but not affordable on a province-wide basis by LiRN/LSO. The LSO has approved nearly a million dollars for this eSuite in 2021, while at the same time fees have been reduced: [LSO Budget](#).

[Law Society Board approves 2022 budget: Reduces annual fees and invests in library resources](#) Oct. 28, 2021: LiRN has also presented a transitional budget request of up to an additional \$900,000 for the expansion of electronic resources available across the network, the related training of library staff to facilitate their ability to support users, and the necessary investment in the information technology infrastructure required to support a shift to digital resources.

If a solo lawyer were to subscribe to the eLiRN suite, it would [cost them \\$40,000/year](#). Please contact LiRN if you would like to see the detailed cost breakdown. The 40 k amount is public, just not the individual breakdown. It is also hoped that the ELiRN Suite will save individual libraries money but not having to subscribe to these resources. There are also several key textbooks available on eLiRN. Please consult [OCLA Core Titles List for the electronic titles](#) available on eLiRN.

For further information about these Electronic Resources, please see the [Electronic Resource Guide available on the LiRN website](#).

### Table of Contents for Electronic Resource Guide

Overview of the resources included including:

- [LN Quicklaw \(LAQ\)](#)
- [Practical Guidance \(LPG\) All modules](#)
- [Westlaw:](#)
  - [Criminal Source](#)
  - [Family Source](#)
  - [Estates & Trusts Source](#)
- [vLex with Vincent AI and Irwin Law Titles](#)
- How to access HeinOnline (law journals, etc.) via [InfoLocate](#)
- AccessCLE for CPD materials in electronic format via [InfoLocate](#)
- Training, Billing, Vendor Contact resources
- Boolean Searching Guide
- Google Search Guide
- List of free websites for research / Association websites

### Can non-members access the eSuite resources located on the terminals in Courthouse libraries?

The LSO's **By-Law 13** mandates it to create LiRN and states that:

"A county law library funded by the Corporation shall give access to its law library services and programs to (a) every person licensed to practice law in Ontario as a barrister and solicitor, regardless of whether the person is also a member of an Association..

**All Ontario lawyers can use the eLiRN suite on the lawyer terminals in your library.**



## Learn with LiRN

LiRN has developed an annual [Curriculum](#) of free professional development programs organized into 4 learning paths: **Electronic Resource Training, Substantive Law, Library Skills, and Soft Skills. Recordings** are generally available on our private [LwL YouTube](#) channel, though we encourage you to attend in case you have any questions. Also available LiRN Quarterly Meetings & information sessions.

### **Learn with LiRN Annual Conference**

All county/district library staff are invited to attend a two day PD conference hosted by LiRN in Toronto on an annual basis. Formerly known as COLAL, now *Learn with LiRN annual conference*. Details are on our website.

Please consult to our [Learn with LiRN](#) page for the latest offerings as well as past sessions/conferences.

## Past Curriculum Topics (Selected)

### **Introduction to Legal Research session**

An introduction to legal research [session on LwL YouTube](#) was created by Joan Rataic-Lang (TLA) and Jen Walker (CCLA). They provided several handouts of this very helpful session for those new to legal research. Please see Learn with LiRN page for handouts and a recording of the session.

### **Forms & Precedents session**

Lee Holstead's (DRLA) [session on LwL Youtube](#) and handout for Finding Forms & Precedents using tools such as LN Practical Guidance, Westlaw, Ontario Court Forms and Access CLE /CPD for annotated forms and older Practice Notes.

### **Introduction to Legislative Research (Federal), this spring Ontario**

Brenda Lauritzen's (CCLA) [session on LwL YouTube](#) focusing on researching Federal Legislation:

- Types of Legislation – both Print and Online sources
- Point in Time Legislation – including examples
- Legislative History – What were they thinking?
- Noting up – how to check if the law is still good?
- Tracking Legislation

### **Accounting Basics for LiRN Library Staff**

Betty Dykstra (YRLA) condensed accounting jargon and procedures into understandable language for library staff who may not be familiar with this type of reporting.

### **Know your Accounting & Fiduciary Duties for your Board & LiRN**

Mary Jo Petsche, Executive Director & Ashley Gibson, President (WCLA)'s presentation focused on best practices for financial reporting for both the Board and library staff.

### **Cool Tips and Innovations from your Network colleagues – March 2023**

### **Best Tips on Communicating with your Board – May 2023**

**For additional information, materials, hand-outs, sessions & recordings,** visit the [LiRN with LiRN](#) page.

## Legal Research Tips

### Where can I find an expert discussing the topic I need help with using the eSuite of Resources?

Quickly get an overview of a legal issue using a variety of sources, including textbooks, articles, *Canadian Encyclopedic Digest* (the CED), *Halsbury's Laws of Canada* (LN QL) aka Secondary Sources. B.O.O.K – Best Organization of Knowledge – start with a book written by a legal expert to save time.

### What are "Primary Sources"?

Cases & Legislation (Statutes, Regulations and Rules) are considered "primary sources".

### How do I find Case Law and Legislation?

o Find a document using its name or citation (ex. *Swanson, 2004 CarswellOnt 5382* or *Family Law Act, s. 20(1)*).

- CanLII, Quicklaw, Westlaw Sources, vlex all have extensive Canadian case law and legislation
- They have **Find** options so that you can type in your case name or statute into a search box
- Click on their HELP option – often a ? in the upper right corner for assistance

### How do I make sure my cases or legislation are "good law"? How do I Note-up a case or law?

Noting up a case refers to searching the history of your case to see if it was reversed on appeal or if other cases distinguished it or overruled it. How do other judges consider the facts of your case in making their decision in their case.

Noting up legislative means searching for cases which apply or interpret the Act or a section the Act.

Other terms include "case annotations", "legislation judicially considered", or "statutes judicially considered". Sometimes lawyers ask "if the law is till good".

Quicklaw/Lexis Advance uses [QuickCite](#) to show the judicial consideration of case/statute.

Westlaw uses [KeyCite](#). There can be some differences in treatments depending upon the coverage of each resource which vary by date and jurisdiction. You can also note-up using [CanLII](#).

## Additional Research Guides

Consult [LiRN's Guide to Electronic Research](#) for information about the eLiRN Suite, training, Google searching, relevant websites, Boolean searching and more. Also [Learn with LiRN Curriculum](#) sessions.

[Student Guide to Legal Research](#) – Provided by the LSO Great Library Reference Staff

[Legal Research Manual](#) Queen's - Case law research, Noting-up, Research Steps, International law

[Research Guides](#) Bora Laskin Law Library (U of T) - Research Guides on all areas of law in Canada

[How to research Ontario's Laws using e-Laws](#) / [How to use the new e-Laws](#)

[The Canadian Legal Research and Writing Guide](#) – CanLII

## Forms and Precedents

### What are forms and precedents?

Forms and Precedents are samples of common legal documents that need to be completed, often for court. Sometimes the forms are legislated by statute or regulation. They can be short or quite lengthy.

### Where to find forms and precedents?

- LN Quicklaw has *Canadian Forms and Precedents* as well as *Williston and Rolls Court Forms*.
- You have access to all modules of **LexisNexis Practical Guidance's** forms and precedents.
- *Westlaw's O'Brien's* is a very expensive duplication of many (though not all) of these forms.

For more information: [Great Library Research Guide on Forms](#)

### Canadian Forms and Precedents (Both Print & LexisNexis Quicklaw)

Canadian Forms and Precedents is also useful for drafting commentary.

Banking & Finance	Employment
Commercial Tenancies	Entertainment
Corporations	Information Technology
Debtor/ Creditor	Sale & Operation of a Business

### Lexis Practical Guidance (formerly Practice Advisor)

This database not only contains precedents and forms, but also practice notes, sample clauses, checklists, as well as tables, flowcharts, and diagrams. Updated regularly.

Capital Markets and M&A / Finance	Family Law	Litigation & Dispute Resolution
Commercial	Insolvency & Restructuring	Personal Injury
Corporate	Intellectual Property	Real Estate
Employment	Information Technology	Will, Trusts & Estates

### Ontario Court Forms

A [free resource](#) for forms. The main ones are Family Law Rules, Rules of Civil Procedure, and Rules of the Small Claims Court. <https://ontariocourtforms.on.ca/en/>

### Law Society of Ontario, Annotated Document Series

Each title in this series contains a sample document annotated with clause by clause commentary and drafting tips written by specialists in the field. To date over 20 topics have been covered. Available online on [AccessCLE](#)

### O'Brien's

- O'Brien's is divided into Divisions, and so has a wide variety of precedents and forms from across many areas of law. The Great Library has access to them in print form and some via *O'Brien's Forms* on Westlaw.

Division I. Commercial and general	Division VI. Ontario: Family law
Division II. Corporations	Division VII. Labour relations and employment
Division III. Conveyancing and mortgages	Division VIII. Ontario: Court forms
Division IV. Leases	Division IX. Municipal Corporations
Division V. Wills and trusts	Division X. Computers and information technology

## Tips and Tricks for New County/District Library Staff

### Advice from your OCLA Colleagues

- BOOK – Best Organization of Knowledge. This acronym was developed by Denis LeMay, a Canadian law librarian. If you can find a BOOK on a topic, it will save you (& your lawyer) hours of research since an expert has written the relevant commentary & included the significant cases, laws, rules, etc.
- Develop a routine – there will be tasks that you need to accomplish daily. Do you need to unlock doors, bring in a paper, startup computers? Set up a notification for 15 minutes prior to the end of your day to finish up any end of day routines to ensure that you leave on time.
- Use the resources that have been created for the system – Sage Accounting Manual, LiRN Library Operations Guide, LiRN Electronic Resources Guide, OCLA website etc.
- Keep your library manual updated with new procedures on a regular basis – cannot stress enough how important this is. This can be helpful to the next person in your job but also to show your Board what and how you do things.
- Attend the *Learn with LiRN* Conference and if possible, the CALL Conference. There are [bursaries](#) available for the CALL Conference. APPLY to CALL. This will also ensure that you get to meet the librarian faces that are behind phone calls and emails. This will also be an opportunity to learn what others are doing. Lawyers are required to do 12 hours of professional learning; this is part of your professional learning.
- Lawyers will refer to books by the author – Martin’s (Criminal Code), McWilliam’s, Kenkel, Orkin etc. or by just a word “Rules” (Civil Procedure, Family or Criminal). Use this information to search InfoLocate but don’t be surprised when “Orkin” is the author for *The Law of Costs*, etc.
- They will often ask for a book by its nickname that sounds like a title, one popular example is *Sopinka on Evidence*. If you look it up on InfoLocate, it may not be found by that nickname. Sopinka is the author, *The Law of Evidence in Canada* is the title.
- If you do the accounting, write your paycheques and get them signed a month ahead of time. The cheques are postdated to your payday and you will not go short on payday because there is no signing officer in sight.
- Your Association is your employer; while they receive the funding to run the library from LiRN, they also make the decisions on your employment
- Keep a running list of your accomplishments – this is helpful not only to see how far you have come but to provide to your board. Share them with LiRN as well in your Quarterly Stats.
- Find a champion for yourself and your law library from the lawyers or the Board to support your ideas and your position (having a supportive library chair on the board is helpful for this). 
- Your OCLA colleagues are an important resource for information and support.
- Learn to use InfoLocate, LexisAdvanceQuicklaw, LN Practical Guidance, Criminal Source (WL), Family Source (WL), Estates & Trust Source (WL) vLex / Irwin law, & HeinOnline – contact vendors for free training, watch *Learn with LiRN* and other YouTube videos, webinars etc.
- Get to know your collection and track usage of materials, or types of materials to make purchasing decisions. Get a shelf list from the cataloguing department of the Great Library. Do an inventory to see what is missing and withdraw the missing items (if the list is long, send it in an excel spreadsheet instead of individually)
- Take calculated risks to improve services. Sometimes failure is a good step to make progress.

- Never be afraid to ask questions of your colleagues – there is a wealth of knowledge among us and rarely a situation that has not been dealt with before.
- Advice: do a proper reference interview to make sure you really understand what the person is looking for as often it's not expressed with the level of detail you would need. Often better to get reference questions by email because, in drafting the email, they tend to provide more information than they would when asking by phone and you can get clarifications in print.
- If you're involved in making arrangements for example an AGM or other event. Create a minute-by-minute to give to the participants and venue. This helps everyone understand their function and what's expected of them at a particular time. Keeps the event running smoothly.
- If it ain't broke, don't fix it – do not change for the sake of change – use the same format/template to make arrangements for CPD's or events.
- Get involved and make connections with both OCLA members, and law librarians across other organizations such as CALL. Professional development is the cornerstone of any information professional's career.

### Most often requested items by Lawyers

Work smarter, not harder – Lawyers are predictable in that they will forget or need some of the same things on a regular basis. You will become a life-saving superhero for providing the smallest of items.

- Pens – buy a supply of cheap pens – never give them your favourite pen – you will never see it again. Pick up any pens that you get at hotels, conferences etc.
- Note pads – keep a supply of cheap note pads for sale or giveaway. Keep a pile of scrap paper so they can staple together to make their own pads of paper
- Designation Forms – Criminal Lawyers only – keep a stack of 5-10 blank forms readily available or compile a folder on the desktop of most commonly asked for forms (Divorce Registration Forms)
- Tabs – and/or Gowns, Shirts, Cufflinks – make them sign them out to ensure they return them
- Phone Chargers – USB, USC and Lightening cords – put a label on them with your Library name
- Criminal Codes/Family Law Rules – you may need to keep more than one copy in your collection and/or readily available at your desk so that you do not have to retrieve it from the shelf daily.
- Keep a basket of emergency supplies on hand: needles & thread, bandaids, Advil/Tylenol/Baby Aspirin; nail files, lint brush, tide to go, cheater glasses, eyeglass repair kit, glasses cleaner, throat lozenges. Most of these items can be purchased at the dollar store and stored in your library/washrooms. Other items to keep handy – mouthwash, extra pantyhose, hairspray, emergency feminine supplies. These are just suggestions however and not mandatory.

## Financial Procedures using SAGE

This Section has been prepared by OCLA Members so that it is in plain language form.

### Payroll Sage 50

*This is the work around version for those without the payroll module*

Make sure you have your **gross salary**, as well as your calculations for your deductions: **CPP, EI, Income Tax**, and **LTD** handy before starting. Use the figures from the Payroll Deductions Online Calculator <http://www.cra-arc.gc.ca/esrvc-srvce/tx/bsnss/pdoc-eng.html> and save as a recurring transaction.

LTD amounts can be calculated by LiRN. If you are unsure of the correct amount, contact Adam Penson

[apenson@lso.ca](mailto:apenson@lso.ca)

→o get the numbers to fill in the entry:

- Open Sage >Reports >Financials >Trial Balance
- Make sure it's on "Current Year" and set to the right month
- Once in Trial Balance go to line "5410 – Librarian Salary" and click on the balance, then click on the balance of the last pay cheque, and the numbers will be there.

Account	Debit	Credit
5410 Librarian Salary		
5420 EI Employer Portion		
5430 CPP Employer Portion		
2110 Accrued Liabilities		
2180 EI Payable		
2185 CPP Payable		
2190 Income Tax		
2210 LTD		
<b>Total</b>		

#### NOTE:

5441 Librarian Salary (or Technician Salary) → Your gross salary before any deductions

2110 Accrued Liabilities → Your actual take home

Print a copy of the "Trial Balance Sheet" to keep with your pay stubs for accounting purposes.

## Source Deductions Sage 50

One per month by the 15<sup>th</sup> Source Deduction Remittance to Receiver General (Canada Revenue Agency) must be completed.

Open your General Journal:

Account	Debit	Credit
2180 EI Payable		
2185 CPP Payable		
2190 Income Tax		
1060 Chequing Account		
WSIB deductions		
<b>Total</b>		

➔ To get these numbers

- Open Sage> Reports> Financials> Transactions by Account
- Make sure it's on "Current Year" and set to the right month for your remittance.
- Select "2180 EI Payable", "2185 CPP Payable" and "2190 Income Tax Payable" and click ok

### Opening and Closing Fiscal Year in Sage 50

1. Complete final transactions for year end – all deposits and invoices
2. Complete year end account reconciliation
3. Backup your fiscal year

#### **To Close and Open:**

Go to Maintenance > Start New Year

➔choose your settings accordingly, everything will be set up for you

➔Save new file as your 2018 budget

## T4 (if applicable)

If you **do not** have payroll, you will want to print off a “Transactions by Account” record for 1 January 2017 to 31 December 2017, make sure you select “2180”, “2185”, “2190”, “5410”, “5420”, “5430”

**NOTE:** Amounts for the forms should be taken from the “Credits” column.

To create T4s, you need to complete two forms:

### 1. T4 Summary of Remuneration Paid (employer form)

<https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/t4sum.html>

- Make sure you enter the year you’re filing for at the top, and the Employer’s account number – this number can be found on your Remittance Forms that you pay your deductions on.

Box 88	Enter number of T4 slips you’re filing
Box 14	Enter Law Librarians’ total wages <ul style="list-style-type: none"> <li>• this is found under “5410” on your <i>Transactions by Account</i> report</li> </ul>
Box 16	Employee’s CPP Contributions <ul style="list-style-type: none"> <li>• take the amount found under “2185” and divide by 2</li> </ul>
Box 27	Employer’s CPP Contributions <ul style="list-style-type: none"> <li>• to get this number look under “5430” on your <i>Transactions by Account</i> report (should work out to the same as Employee’s amount)</li> </ul>
Box 18	Employee’s EI Premiums <ul style="list-style-type: none"> <li>• to get this number, take the total amount from “5420”, and subtract amount from “2180” and that is the amount</li> </ul>
Box 19	Employer’s EI Premiums <ul style="list-style-type: none"> <li>• to get this number, take the total amount from “5420”</li> </ul>
Box 22	Income Tax Deducted <ul style="list-style-type: none"> <li>• take total amount from “2190”</li> </ul>
Box 80	Total Deductions Reported <ul style="list-style-type: none"> <li>• Add everything up</li> </ul>
Box 82	Minus Remittances <ul style="list-style-type: none"> <li>• Should be the exact same number as Box 80</li> </ul>

### 2. T4 Statement of Remuneration Paid (employee form)

<https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/t4-statement-remuneration-paid-slip.html>

- All the amounts you need are going to be on the previous (employer) form

Box 10	Province of Employment <ul style="list-style-type: none"> <li>• ON</li> </ul>
Box 14	Employment Income Line 101

	<ul style="list-style-type: none"> <li>• this is found under “5410” on your <i>Transactions by Account</i> report</li> </ul>
Box 16	<p>Employee’s CPP Contribution</p> <ul style="list-style-type: none"> <li>• take the amount found under “5430”</li> </ul>
Box 18	<p>Employee’s EI Premiums</p> <ul style="list-style-type: none"> <li>• to get this number, take the total amount from “5420”, and subtract amount from “2180” and that is the amount</li> </ul>
Box 22	<p>Income Tax Deducted – line 437</p> <ul style="list-style-type: none"> <li>• take total amount from “2190”</li> </ul>
Box 24	<p>EI Insurance Earnings</p> <ul style="list-style-type: none"> <li>• same as box 14</li> </ul>
Box 26	<p>CPP Pensionable earnings</p> <ul style="list-style-type: none"> <li>• same as box 14</li> </ul>
“Other Information”	<p>Box Case is #40, amount is the amount that came in the letter from Leystone</p>

## T2 (only if your Association is incorporated)

Complete T2 and send to Summerside Tax Centre, 275 Pope Road, Summerside, PE C1N 6A2. Ensure it reaches CRA by May 15. To complete the T2 you will need to refer to the previous years' financials for both the Association and Library Budgets – you will need to combine the two budgets in order to complete certain parts of the T2. Important codes and how to calculate/where to find them are listed below:

### **Schedule 1**

3426 Net Income – current earnings from balance sheets

### **Schedule 100**

1000 Total Cash

1484 Accounts Receivable

2620 Accounts Payable

2627 Employee deductions payable

3600 Total Retained Earnings

3620 Total Equity

3640 Liabilities/Equity

3660 Retained earnings from previous year (Library – accumulated surplus under the equity heading on balance sheet)

3680 Current earnings

### **Schedule 125**

8220 Total Revenue (from income statement)

8320 Total Collection Costs (Library)

8710 Bank Charges

8761 Membership Fees Paid (Association – FOLA membership fee; Library – fees and dues under Operating Expenses)

8810 Office Expenses (Library)

8811 Office Supplies (Library)

8862 Accounting Fees (Library)

9060 Total Payroll Expenses

9150 Computer Related Expenses

9151 Upgrade/Updates to Computers Software

9200	Travel Expenses (Association – FOLA Conference; Library – Airfare/Travel, Accommodation, etc.)
9201	Conference Expenses (Conference registration fees, CPD Seminars, etc.)
9225	Telephone
9270	Miscellaneous (Association – Executive meeting lunches, Christmas/Summer/AGM party expenses, gifts etc.)
9275	Courier
9367	Total Operating Expenses on T2 Schedule 125 (add up operating expenses)
9368	Total Expense on Simply Accounting Income Statements
9970 and 9999	Net income on Simply Accounting Income Statements

**If you need to update information with the CRA:**

1. Download and fill out the RC59 form – you will need an authorized director to sign it (sample is in the T2 file folder)
  - a. When you fax it in, include a covering letter and copy of official meeting minutes for them to verify the individuals to be authorized. The covering letter should indicate you are updating the authorized directors and include the header:  
ATTN: Business Number Services  
  
Association Name  
  
Business #
  - b. It takes 15-20 business days for them to complete the changes, be sure to check back with them four weeks after faxing the form in to: 902.432.5938
2. You can contact the business services help desk at 1.800.959.5525

**What to do if you received a Job Credit from the CRA?**

Enter as a General Journal:

1060 Chequing Account Debit \$90.00

5420 EI Expense Credit \$90.00

If you're wondering what a Job Credit is and how it is calculated, click on this CRA link: <http://www.cra-arc.gc.ca/whtsnw/tms/sbjc-eng.html>

## Toll Free Numbers for each County/District & Map of Locations

Algoma District (Sault Ste. Marie) 1-866-840-2540	Muskoka Region (Bracebridge) 1-866-613-9217
Brant County (Brantford) 1-866-759-2038	Nipissing Region (North Bay) 1-866-899-6439
Bruce County (Walkerton) 1-866-486-4365	Norfolk County (Simcoe) 1-866-648-8708
Carleton County (Ottawa) 1-866-637-3888	Northumberland County (Cobourg) 1-866-214-8450
Dufferin County (Orangeville) 1-866-862-9931	Oxford County (Woodstock) 1-866-750-5169
Durham Region (Whitby) 1-866-742-4316	Parry Sound District (Parry Sound) 1-866-456-6472
Elgin County (St. Thomas) 1-866-545-6335	Peel County (Brampton) 1-866-228-0235
Essex County (Windsor) 1-866-815-1112	Perth County (Stratford) 1-866-365-0218
Frontenac County (Kingston) 1-866-893-2010	Peterborough County (Peterborough) 1-866-556-8395
Grey County (Owen Sound) 1-866-578-5841	Rainy River District (Fort Frances) 1-866-684-1184
Haldimand County (Cayuga) 1-866-528-5779	Renfrew County (Pembroke) 1-866-705-8538
Halton County (Milton) 1-866-838-5139	Simcoe County (Barrie) 1-866-692-6163
Hamilton (Hamilton) 1-866-213-6867	Stormont, Dundas & Glengarry (Cornwall) 1-866-830-9118
Hastings County (Belleville) 1-866-544-3310	Sudbury District (Sudbury) 1-866-508-7655
Huron County (Goderich) 1-866-266-3270	Temiskaming (Haileybury) 1-877-672-5655
Kenora District (Kenora) 1-866-684-1164	Thunder Bay District (Thunder Bay) 1-866-684-1186
Kent County (Chatham) 1-866-575-2529	Toronto Lawyers' Assoc. (Toronto) 1-866-258-8886
Lambton County (Sarnia) 1-866-203-5101	Victoria Haliburton (Lindsay) 1-866-895-6220
Lanark County (Perth) 1-866-593-0236	Waterloo County (Kitchener) 1-866-201-0168
Leeds & Grenville (Brockville) 1-866-503-0574	Welland County (Welland) 1-866-455-6489
Lennox & Addington (Napanee) 1-866-603-6383	Wellington County (Guelph) 1-866-893-5220
Lincoln County (St. Catharines) 1-866-637-6829	York Region (Newmarket) 1-866-221-8864
Middlesex County (London) 1-866-556-5570	<a href="#">MAP of County Locations</a>

## Association & Building Contacts

<p>Law Association <i>Address here</i></p> <p>Phone: Fax: Toll Free: E-mail:</p> <p>Website address (if applicable):</p>	<p>President Name: Email:</p> <p>Library Chair Name: Email:</p> <p>Treasurer Name: Email:</p>
<p>Building Supervisor / Cleaners Name: Phone: Email:</p>	<p>Building Maintenance / Security Name: Phone: Email:</p>
<p>Supervisory Duty Counsel Office/FLIC Phone:</p>	<p>Crown's Office Phone:</p>
<p>Trial Coordinator Name: Phone: Email:</p>	<p>Local Police Name: Phone: Email:</p>
<h3 style="color: green;">Service Contacts</h3>	
<p>Accountant Name: Phone: Email:</p>	<p>Computer Technician Name: Phone: Email:</p>
<p>Photocopier Lease Name: Phone: Email:</p>	<p>Phone / Internet Provider Name: Phone: Email:</p>

## Internet / Wifi / Fax Information

Telephone/Internet Acct # xxxxxx

Fax Line is: xxx xxx xxxx

Modem type:

Static IP Address: xxx.xxx.x.x (LiRN has this information if you do not).

WIFI:

Password:

## Telephone Message Retrieval/Set Greeting

To retrieve messages from the library phone – *if applicable to your phone*

- Press the talk button and the small button above MENU
- The number will dial automatically
- Service in English press “1”
- Enter Telephone Number “xxx xxx xxxx”
- Press the code “\*” to retrieve messages
- When asked for name stay silent...“the last time this voicemail was checked was by [silence]” > 2 > 11
- To erase “7”
- To listen to next message “11”
- To exit “\*”

## Email

To set up Out of Office reply for Outlook users:

- Enter email & email password > Preferences > Auto Reply Messages
- Type message, set dates, click Set as Active.

## Accounting

Most county libraries use *Sage 50 Accounting 2017 Canadian Edition (SAGE 50 2017 CA PRO)*

Client ID:

Name:

ActivtnKey:

Serial #:

Portal:

Password:

## Passwords and Login Information

<b>Library Email</b> Username: Password:	<b>LiRN Website</b> Username: Password:
<b>LexisNexis Quicklaw &amp; Practical Guidance</b> Username: Password:	<b>Westlaw OnePass Criminal, Family, Estates Source, etc.</b> Username: Password:
<b>vLex</b> Username: Password:	<b>Westlaw Billing / Thomson Reuters</b> Username: Password:
<b>OCLA Online Message Board</b> <a href="https://oclanet.org">https://oclanet.org</a> Password: Contact OCLA for password	<b>Canadian Association of Law Librarians (CALL)</b> Username: Password:
<b>Brodart / Library Supplies</b> Username: Password:	<b>Internet Provider Account Information</b> Username: Password:
<b>Canpar for Interlibrary Loans</b> Shipper number: 42000144 Authorization Key: <b>Libraryco1</b>	<b>Association website software (if applicable):</b> Username: Password:
<b>Law Society of Ontario (CPD Portal)</b> Username: Password:	<b>CPDOnline</b> Username: Password:
<b>Code for Library Door:</b>	<b>Code for Robing Room:</b>

## Publisher & Vendors Contacts

### Thomson Reuters

**Daniel Behar**

Carswell  
One Corporate Plaza  
2075 Kennedy Road  
Toronto, ON M1T 3V4  
Phone: 1-800-342-6288 x 8848  
Direct: 416-649-8848

Email: [Daniel.Behar@thomsonreuters.com](mailto:Daniel.Behar@thomsonreuters.com)

Online catalogue: <https://store.thomsonreuters.ca/en-ca/home>

MYACCOUNT

Login

Password:

### LexisNexis

**Michael Hendrie**

LexisNexis Canada Inc.  
Suite 700  
123 Commerce Valley Drive East  
Markham, ON L3T 7W8  
Tel: 416-929-4061 / 1-800-209-9621

Email: [Michael.Hendrie@lexisnexis.ca](mailto:Michael.Hendrie@lexisnexis.ca)

Online Catalogue: <https://store.lexisnexis.ca/>

### Irwin Law Books

*Essentials of Canadian Law* series is now available on [vLex](#), part of LiRN's eSuite of Resources.

14 Duncan Street, Suite 206

Toronto, ON M5H 3G8

Toll free: 1-888-314-9014

Online catalogue: [https://irwinlaw.com/browse/?filter\\_publisher=irwin-law-inc](https://irwinlaw.com/browse/?filter_publisher=irwin-law-inc)

## Vendors Contacts for Training on eLiRN Resources -- CPD Accredited – Professionalism

Please feel free to contact any of our eLiRN vendors to set up a training session for yourself or to arrange one for your lawyers. The lawyer sessions can be accredited for CPD Professionalism.

[Teresa Verhoeven](#) @Westlaw Canada [Training Resources](#) including webinars, guides, how to, etc.

[Gordon Brough](#) @LexisNexis Canada [Training Resources](#) including webinars, guides, how to, etc.

[Neha Hhumayun](#) @ vlex & Vincent AI [vlex Resources](#) (upper right corner) webinars, guides, how to etc.

## Office and Library Supplies

### Printers

Type of Printer and type of cartridge needed – black / colour / laser

Date purchased:

Record information here for re-ordering from vendor.

### Library Supplies Brodart

- Book sign-out cards, pockets and spine label covers
- Borrower's Cards            1000/box White            23-115-002
- Standard Pocket/Self Stick - Plain - Acid Free    500/box            23-528-001
- Brodart SuperBond 1 1/2" x 1" Laser Spine Labels 25 sheets/1,400 labels per package    55-323-002
- Label Protectors on Rolls in Round Plastic Box Standard 1 mil polyester protectors 1 1/4 x 3 1/8, 1000 per pack            55-229-502

### Suggestions of Items to have on hand for loans to lawyers

- White Tabs for their gowns
- cufflinks
- toiletries and sewing kits in robing rooms
- pens, scrap paper
- cords for devices, e.g. octopus charger
- USBs– micro usb, usb-c
  - Some Associations have branded USB keys

## Photocopying

**PRICES and Procedures vary between associations.** Below is suggested wording for signage by Photocopying machines.

### Copyright Message for Photocopiers

The Law Society of Upper Canada's *Access to the Law Policy* supports users of the Great Library who require access to legal materials while respecting the copyright of the publishers of these materials, in keeping with the fair dealing provisions in sections 29 and 29.1 of the Copyright Act. The county and district law libraries endorse and adopt this policy regarding copyright privileges and obligations under the Copyright Act.

Any violation of copyright is the responsibility of the copy machine user.

### Self-Service Copying

Improper copying of published materials infringes copyright. The XXXX Association does not authorize anyone to use its photocopier/scanner in a manner that infringes copyright. Any misuse of the XXXX's photocopier/scanner may result in the offender, as well as their law firm and/or principal(s), being held liable for civil and/or criminal penalties for copyright infringement, and denial of future access to the XXXX's photocopier/scanner.

### Moneris Credit/Debit Card System for Photocopier (if applicable)

- Unit is located on Librarian's computer connected with Sage
- Administrator card in Librarian's drawer
- Log in
- Enter amount
- Give to purchaser to insert card, password, OK
- Two receipts printed; give 1<sup>st</sup> to purchaser

Manual e.g., over the phone: enter amount, type in card #, expiry, csv. Swipe Administrator card. Read receipt number.

**Pre 1997** The County and District Law Libraries was a collection of 48 libraries managed by local County and District Law Associations with some guidance from the Great Library's Chief Librarian. Libraries received funding through financial grants from the LSUC (Law Society of Upper Canada as it was then called), dues raised locally, and from special project funding from the Law Foundation of Ontario.

**1997-2000** Under Susan E. Elliott, former Treasurer of the LSUC, a vision for the management of the 48 libraries was developed. Ms. Elliott and her Working Group advocated for province-wide standards relating to staff, collections, technology, facilities and services. The Working Group produced a three-phase report ending with the Phase 3 in May 2000. The reports were titled *Beyond 2000: The Future Delivery of County Library Services to Ontario Lawyers* or better known as the Elliott Reports. The reports proposed the creation of a non-profit corporation to oversee the implementation of the system.

**2001** LibraryCo. was formally incorporated in April 2001 and had two shareholders - the LSUC and FOLA (previously known as the County and District Law Presidents' Association CDLPA). LibraryCo was governed by a 15 member Board comprised of law librarians, and lawyers representing the LSUC, FOLA, OBA, TLA, and OCLA as well as several members-at-large. LibraryCo officially opened its doors in Burlington on September 25, 2001.

**2007-2014** 2007 was a year of significant change and reorganization for LibraryCo. As a result of the report and recommendations from the LibraryCo Integration Task Force, a new shareholders' agreement and administrative services agreement was negotiated and implemented in 2007. During this time the Board of Directors was reduced in size from fifteen to eight, and some of the organizations which had been represented on the larger board no longer had specific seats on the new Board. These changes were implemented primarily for the purpose of improving communication and co-operation between the shareholders and the Board of LibraryCo. The Burlington office of LibraryCo was closed in the summer of 2007 and the LibraryCo office was moved to Osgoode Hall.

**2014-2016** In October 2014, Convocation of The Law Society of Ontario (formerly LSUC), LiRN's primary funder and voting shareholder, received an information report outlining the work of the Legal Information and Support Services Working Group (LISS) and the potential next steps in the evolution of legal information and library services. In 2015 the Board established a transition committee for the purposes of defining the approaches that would take to support the provision of legal information and library services in Ontario into the future — with an emphasis on sustainability and supporting the needs from the perspective of users. An external consultant was retained to undertake an analysis of legal information and library services. Following the completion of the analysis, and upon recommendation of the Transition Committee, the Board developed a plan for next steps in the evolution, including optimal approaches to the provision of legal information services, and obtained confirmation from its shareholders to proceed to implementation.

**2019 – Present** In late 2019, a new structure that governs the delivery of library services and legal information to Ontario licensees was approved by the LSO, FOLA and TLA. LibraryCo was renamed LiRN Inc. (Legal Information and Resource Network) will have an independent skills-based board of directors who will focus on the modernization of the delivery of legal information and library services. *LibraryCo 2019 Annual Report*.

## APPENDIX B: Welcome to OCLA



### What is OCLA?

OCLA is an acronym for the *Ontario Courthouse Libraries Association*. There are 48 courthouse libraries across Ontario, most located in or near to an Ontario Court of Justice or Ontario Superior Court of Justice. OCLA libraries are divided into 3 classification types based on size of membership, proximity to law school and major centres.

There are:

- 5 regional libraries
- 15 area libraries
- 28 local libraries

### What is OCLA about?

OCLA Mission statement: The Ontario Courthouse Librarians' Association (OCLA) provides support and a unified voice for all county and district law library staff members across the province. To ensure that these functions are carried out in an effective manner, OCLA will:

- Support and promote the pursuit of continuing education for all OCLA members.
- Provide a timely and effective method of communication to all members through the use of email and printed materials.
- Provide appropriate OCLA representation to other organizations and administrative bodies.
- Maintain positive relationships among all individual OCLA members, and with all appropriate organizations and administrative bodies
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### How do I become a member of OCLA?

Every year a membership due of \$50.00 per member, up to a maximum of \$200 per library is collected. Contact the treasurer to inquire about your library's current status.

## Who do I speak to regarding OCLA issues?

Please visit [the OCLA website](#) for a current list of the OCLA executive.

## Do the members of OCLA have meetings to discuss issues?

Yes. Members meet on a semi-annual basis during COLAL (conference for Ontario Law Associations' Libraries), which is held in October and during the annual CALL (Canadian Law Libraries Association) conference in May. Any other issues can be managed on an ad-hoc basis, as need arises, by contacting members of the executive.

*Please feel free to contact any one of the members of OCLA; our members are a knowledgeable source of information, especially when you are new to the courthouse libraries system. Each library has a toll-free number. This is a key lifeline, especially to new OCLA members.*

## OCLA website

<http://oclanet.com/>

To launch onto the members portion of the website follow the instructions below. Please consult the OCLA website for information contact information to join OCLA.

If a library has more than one member and they are using one email I we cannot add more than one person per email. If these libraries want everyone to have access they need to provide Laura with full name of member and an email address.

From oclanet.com - go to Members Login and enter

Username: oclanet

Password: Ontlaw33

From the list go to DISCUSSION BOARD

Enter username as sent via email and password is ontlaw

Members can see their Profile on the right to add a photo and signature.

Passwords should NOT be changed as this will cause issues in setup - Password is the same for all.

[Core List of Library Titles](#) is available under Publications on the OCLA website as well as other benefits.

## Appendix C: Key Acronyms

**OCLA** – [Ontario Courthouse Libraries Association](#) – your lifeline to just about any question you may have, reference, procedures, etc. There is a variety of experience here – many have been in the job a long time and have probably dealt with every question under the sun. Never hesitate to make contact with your colleagues who are generally happy to help.

**FOLA** – [Federation of Ontario Law Associations](#) – (previously known as CDLPA) is an organization that all Associations belong to and their mandate is to advocate on behalf of lawyers to ensure that their voice is heard. They are part shareholders of LiRN along with the Law Society of Ontario and the Toronto Lawyers Association. Associations pay a fee to FOLA (currently a base fee plus \$27.50 per member) and there are 2 plenary programs, Spring and Fall which a representative of the Association attends. It is usually the President or their designate. Some Associations send more than one representative and some send a Library Staff person.

**LSO** – the [Law Society of Ontario](#) is the governing body for Lawyers and Paralegals in Ontario. A portion of lawyer's annual LSO fees is directed to the library system and is distributed to the individual libraries through LiRN. Because it is a universal fee paid by all Lawyers, there is universal access to all Lawyers in good standing to your library. They are not required to be a member of your Association nor any Association to have access to your library. This access may vary depending on your location and be limited to when Library Staff are present. Paralegals do not pay the library levy on their fees and there are various views on whether they are admitted to your library. Some libraries have Paralegal memberships, some have Paralegal library fees and others allow Paralegals either no access or full access. There are also various views on allowing members of the public access. Your Board will dictate their views on these issues.

**CALL/ACBD** – [Canadian Association of Law Libraries](#) – membership based Association of Librarians across Canada. The annual conference is held in May; the location varies across Canada. There are several bursaries available from LiRN and two from OCLA. As there are a number of OCLA members who attend the CALL Conference, we have a meeting while we are all there.

### Learn about the Justice/Court system

If you are new to the legal field, there is a whole new language to learn. Learn about [Ontario court system](#).

There are courses that are available to teach you the different areas of law. Mohawk College usually offers a course called *Law Libraries and Legal Research* which is often taught by an experienced law librarian in our system. You can apply for an educational bursary from LiRN for this program. The [New Librarian's Institute](#) sponsored by CALL/ACBD is an intensive, week-long program aimed at developing librarians' skills in the key competencies of law librarianship. It is held on a biannual basis and LiRN will offer a bursary to 1 person in our system. There is a very good and reasonably priced series available on the CALL website <https://www.callacbd.ca/webinars-&-lectures> (go to the bottom of the page). There are numerous websites developed by CLEO, duhaime.org, Law School University or [LSO guides](#) from the Great Library which will also help in your work.

## APPENDIX D: Moneris Instructions *(if applicable)*

*These vary for each Association and are not part of your LiRN responsibilities. This is provided for INFORMATION PURPOSES only and not an expectation for LiRN.*

\$5.00 minimum

### Each Morning

- Rt click Sage Exchange icon lower rt tray  
RESTART APPLICATION
- Open ASSOCIATION Account and set

### Copies

SALES (to create invoice)

CUSTOMER > CASH SALES PHOTOCOPY

DESCRIPTION > copies, file #, etc.

AMOUNT > enter \$, Sage will add hst

PAYMENT METHOD > VISA, ETC.

PROCESS CC

CHARGE

- In person > SWIPE > Hand unit to purchaser
- On phone > enter cc info > SUBMIT

OK > OK

Email or print RECEIPT from top left corner

PROCESS bottom left

### Other Purchases Members (not Invoiced)

SALES > CUSTOMER >

Select code eg. 4530 new card,

AMOUNT

ETC.

### Copies (Members) – even if invoiced

SALES (to create duplicate invoice)

CUSTOMER > Select member's name

4535 Copy Funds to be transferred

PROCESS

Go to:

RECEIPTS and will see under Member's name

### If Invoiced (for anything)

RECEIPTS

FROM > Type name

Click in rt column to select bills paying

PAYMENT METHOD

PROCESS CC

CHARGE

In person > SWIPE > Hand unit over

On phone > enter cc info > SUBMIT

OK > OK

Email or print RECEIPT from top left

PROCESS bottom left

to

date

## APPENDIX D: CPD Education Sessions

*These vary for each Association and are not part of your LiRN responsibilities. This is provided for INFORMATION PURPOSES only and not an expectation for LiRN.*

### CPD Online

New November 2018: FOLA has partnered with CPD Online. LiRN does not endorse 3<sup>rd</sup> parties, but provides the following to any lawyer enquiring:

1. Visit [cpd.video/XXXX](http://cpd.video/XXXX) > Get Started > Individual Subscription
3. Use Association Code: “xxxxCPD” at checkout

### Education Session Lunches

- Education Lunches occur throughout the years with the exclusion of the summer months. Currently Ontario lawyers require 3 h Professionalism, 9 h Substantive each year to maintain their standing with the LSO. By the end of 2020 all lawyers need 3 EDI hours (Professionalism).
- Topics are generated by the OCJ & Education Committees (Criminal, Family, Civil) and notices emailed to members through monthly newsletter & independent mailings.
- Notices are sent out to Members, Judges of the OCJ, Justices of the Peace and Crown’s Office, depending on topic. Some CPDs are targeted to only Criminal, Estates, Family members, etc.
- Lunch may be provided by the Association on a per person basis – sandwiches and desserts.
- Cost to members is \$15 whether eating or not, and whether they attend or not (There are costs involved with the committees organizing the CPDs). Their articling students can attend if room (\$15) but no staff or paralegals. As of April 2017, non-member lawyers may attend by paying \$35 and only if there is room; they are put on a waitlist. Lawyers only (their articling students are free). There is a cutoff date for RSVP and numbers should be limited to 60.

### Registration

- CPDs are listed on the Association website, advertised in the newsletter (if applicable), posted in the lounge, and targeted emails are sent to members.
- Registration can be via email, in person, fax, or sign posted in lounge;
- Payment: many lawyers still use cheques & cash. Payment at time of sign-up is encouraged (cash, cheque or credit card). If they register via phone, fax, email or in person
- Lunch & Learns are live and cannot be viewed later. Video replays can be viewed in the Library or lawyer’s office on an alternate date.
- Receipts can be hand-written using Staples receipt book if asked.
- After CPD, lawyers will need to be emailed a *Record of Attendance* sheet.

## CPD Setup – Live

(Note: cheaper to do replays than live but no opportunity to ask questions)

**This are suggested procedures but application may vary in each library.**

Make sure you have a list of all registrants. Bring to CPD with a pencil, envelope and a few \$5 bills. Mark off attendees and add payments made as applicable.

After CPD will use these stats to email CPD Hours Sheet to paid registrants.

- Turn on TVs with Vizio remote, set INPUT to laptop.
- Connect laptop to power and to tv with HDMI to wall (not to tv) > automatically shows desktop (laptop password)
- If using audio from laptop, plug in audio cord from laptop speaker port to wall. If not, leave unconnected.
- Audio System - turn on POWER lower right. Turn on power corresponding to microphone(s) RED, BLUE, YELLOW and/or GREEN. Use corresponding volume control, not master volume.
- Microphones turn on power switch. Mute button available. Clips on to lapel & belt. Test volume level from back of room.
- Get out podium. Mouse will work from there.
- Mark attendance & take cash/cheque payment. Debit/credit card people told to do online or come to library later. CPD receipts are emailed after event, not handed out at the time. Sometimes the presenters leave materials to be attached. Send to all registrants, whether attended, paid or not.

## Post-CPD

- Turn system and mic off (hold down mic ON switch until off)
- Store extra food in fridge & put out next day lunchtime with Help Yourself sign
- Email CPD hours receipt & any handouts to all paid registrants  
From Event Registrants list > Email registrants > CPD Receipt template > fill in > Send

## CPD Setup – Video Replays

These webcasts have been created by the LSO after a CPD has taken place. Joint viewing can be set up as CPD session. Tip: Can be downloaded in advance.

You may have an Association account on the **LSO Store** where the mp4 files & related PDF materials are located.

- Login at: <https://store.lso.on.ca/>
- My Account
- Returning Customer (Non-Licensees Only)

- Login password
- Purchased Programs > Details > Download mp4 to “20xx LSO CPD” folder laptop desktop

Watch at Office/Home (Instructions for Lawyers):

- Go to store page <https://store.lso.ca>
- Click “My Account”
- LSO members click on blue box under “Lawyer and Paralegal Login”
- Enter name & password Purchased Programs > Details > Click here to view on demand

If they want to watch the same day they register & don’t have their own link yet, log into your Association account then send the link but have them fill out their own information.

<https://store.LSO.on.ca/customer/info>

- An alternative method is to send the downloaded file from the laptop desktop (but often too large for email accounts).
- A common problem with not seeing the video is they have flash or video content blocked. Click the “i” in the search bar and give permission

Procedures to set up a Video replay in your Library / Lounge:

One day before:

- Download mp4 file to library laptop
- Print CPD materials table of contents (only) for registrants, as they can access all the PDF materials in their portal
- Post notice if lounge reserved for CPD if applicable

Day of:

- Food and drink often provided but check with your Association.
- Starts 2:30, usually 3-4 hours
- Turn off paging system, print & post sign for others
- Ask viewers to let you know when break so can fast forward through it
- Check near end; viewers often leave during the Q&A at the end

Bench & Bar Meetings – Quarterly

- Check with each Association.

## APPENDIX E: Sample Circulation Policy

This policy provides the overall framework to facilitate free and equitable access to library collections and services, and to establish consistent rules and regulations that protect Library collections and services. The Law Society of Ontario's *Access to the Law Policy* supports users who require access to legal materials while respecting the copyright of the publishers of these materials, in keeping with fair dealing provisions in s.29 and 29.1, *Copyright Act of Canada*.

### A. Users

All library users must be members of the *Law Society of Ontario*. Borrowing privileges are restricted to members of the NCLA only.

### B. Visiting Lawyers and Judges

Lawyers and Judges who are non-members may use the library services while visiting the Cobourg Court House. Documents can be photocopied upon request, and visitors may be invoiced for any copy charges.

### C. Loan Period

Books may be signed out for a period of 3 weeks. Reference materials are marked with a "Library Use Only" sticker are **non-circulating and cannot be removed from the library**. Special arrangements may be made with the Librarian for the removal of non-circulating items, on a case-by-case basis. Interlibrary loans are due the date indicated by the lending library.

### D. Renewals

Books may be renewed for an additional 3 weeks; at the end of this period they must be returned to the library, or replaced. Patrons may renew their books by contacting the Librarian.

### E. Reserves

Reserves may be placed either in person or over the phone. Patrons will be notified by email or telephone when their requested materials are available. There is no charge to place a reserve or for interlibrary loan services.

### F. Fines and Charges

Overdue notices are sent once a book is overdue by 7 days. A second notice is sent at 30 days, and at 45 days an invoice for the cost of replacing the book, plus shipping, and a \$25.00 service fee per book. Users with overdue books will have their borrowing privileges revoked until the matter is settled, and in some cases access cards will be deactivated to prevent entry to the library outside of Librarian hours.

### G. Lost or Damaged Materials

If materials are damaged beyond use, so as to be judged by the librarian, the patron must pay the replacement cost. Damage does not include cumulative wear and tear that occurs through normal use. If a lost item is found before the fine is processed, the payment may be returned. If the item is found after the fine has been processed, the payment is not refunded as the administrative, processing and replacement costs have already been incurred.

### H. Confidentiality

The Library respects the privacy of individuals and will safeguard their personal information and research requests. Library staff will not discuss reading tastes, or items borrowed by library patrons with third parties, as per *The Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c. M.56*. Information may only be released to another individual or organization upon written consent from the patron. The written notification must be dated and include the name to which the information is to be released and the specific information that is to be released.