

MONARCH CIRCULATION COMMITTEE MEETING MINUTES

*Corrected

Mead Public Library
710 North 8th Street
Sheboygan, WI 53081

April 6, 2017

Called to Order: 9:35 AM

Adjourned: 12:08 PM

MEMBERS PRESENT: Alison Hoffman, Monarch Library System; Jane Matko, West Bend; Pam Garcia, Waupun; Camrin Sullivan, Mequon-Thiensville; Rhonda Klemme, Mayville; Colleen Swart, Oostburg; David Nimmer, Cedarburg; Elizabeth Daniels, Iron Ridge.

Call the meeting to order: David Nimmer, Chair called the Monarch Circulation Committee Meeting to order at 9:35 am at Mead Public Library, 710 North 8th St, Sheboygan, WI.

Public comment and correspondence: No public present.

Approval of minutes, March 2, 2017: Daniels moved for approval of the March 2 minutes, Sullivan seconded. Motion carried.

Best Practices:

a. **Patron Registration, more work on guidelines:**

Garcia asked about format for the Driver's License field for juveniles, if there is something that ESLS did consistently prior to our merge. In SIRSI, MWFLS libraries used a date and initial code that ended up not being very effective. Kallas mentioned that they put the words "Mom's ID" or similar in the field with the parent's ID. Putting this in front of the DL would likely not find patrons if that field is used as a duplicate check. It was mentioned that some libraries do not put licenses in because of the fear of information being compromised. Nimmer mentioned that ID is usually used initially for ID at registration and when collecting money. This is not a normal field used for duplicate checks. The group determined that there isn't a set way to enter formal ID information for juveniles, but could enter the parent's ID followed by wording such as "Mom's ID", etc. Noted that if the Driver's License is from a different state, or a Passport, that should be mentioned in this field.

Conversation shifted to duplicate checking. How well does it check duplicates for phone? Hoffman mentioned that it has to be exact. Or, the use of asterisks and a core number can be searched to locate patrons. Asterisks can be placed at the beginning or the end of a set of characters to be searched.

Are birth dates a required field? Nimmer doesn't think it is a required field. Kallas thinks birth date is the best way to catch duplicates. Birth dates are helpful when people have the same name. The circulation committee would recommend having birth date be a requirement.

The former barcode field was discussed. An old barcode is not kept unless you enter it into this field or if records are merged. This information might be helpful for overdrive, since if a barcode is changed, holds or loans do not transfer to the new barcode. Alison did a test with an old barcode, and it does not recognize it when scanned in checkout, but does appear in the registration, but it can't be searched. Do we want the former barcodes to be turned on? (Turning it on would mean the former barcode would automatically be entered into this field when a different card is issued—in the case of a lost card.) Alison will look on

the functionality of the former barcode field and report back. Thoughts are mixed regarding whether or not this should be an option.

Kallas discussed the option of reprinting book/patron barcodes. She is wondering if there is a more affordable barcode printer? We could then print barcodes out, allowing patrons to keep their same barcodes. Kallas will look into barcode printers.

For libraries that have the Internet field as a required field, what is the standard selection? Daniels, who has this as a required field, says to select "Yes". If changing from no to yes, putting a note in the record would be useful.

Libraries that use aldermanic district are West Bend, Germantown, Hartford for those living in those communities. Select Unknown if registering a patron living in one of those communities, if registering them in a different community, so those libraries can search for those patrons and put them in the correct district.

Daniels wondered, in regards to registered library, what "service area" is defined as? How does service area overlap with stat codes? Daniels will look into it. Registered area is to mean where the patron lives, if in a libraried area.

Password: what are libraries allowing people to use? What are people doing? Sheboygan/Ozaukee were doing last four digits of patron's phone number. Dodge/Washington have a mix. Garcia mentioned that in Dynix (pre-2007), passwords were not required and most accounts did not have a password. When those accounts came over to SIRSI, CHANGEME was entered because SIRSI required a password. This was in all caps. All passwords were entered in all caps until a certain point, when lowercase was an option. So, Dodge/Washington libraries have an issue with many passwords that came over.

We now we have the forgotten password option to reset their password. It will send an email to them with a generated password. See more information on the forgotten password option later on in these minutes.

Reconciliation Report

Nimmer developed some guidelines to take to the ILS committee regarding the reconciliation report. Libraries will keep money in their libraries for accounting purposes and then reconcile processing fees/lost items with other libraries using a custom reconciliation report once or twice per year.

Discussion arose regarding how lost items are processed, both when set to lost and regarding lost item recovery. All are set based on the policies of the lending branch. Lending branch policies would apply, but lost/processing fee money would be sent to owning library via the reconciliation report. Automatic billing is following the same process. We do not have the option of changing this to owning library policies.

The canned report in Polaris reconciles all fines and fees, so we are recommending Polaris to start with this report but customize it to just look at damage, replacement and processing fees.

The circulation committee recommends to the ILS committee to have Polaris configure the *XXX Payment Distribution report to reconcile damage, replacement and processing fees only, and have all directors determine the frequency of the report. Daniels moves, Swart seconds. Motion carries.

b. Notification History

We noted that in the General View under Patron Status, you can see the patron's notification history for things such as hold, preoverdue, overdue, etc. A guide was created and sent out. See the guide for more information.

It was noted that a librarian pointed out that if emails do not reach the patron or bounce back, Polaris will still indicate a notification was successful. Technically, in these cases, Polaris did its part. The problem is not with Polaris for those bouncing back, it is a problem with the email service or an inaccurate or full email account.

Alison is working with Robert on a technological explanation regarding when emails do not reach inboxes but it isn't Polaris's problem.

c. Forgotten Password – in PAC

A short guide was sent out regarding how forgotten password operates in the PAC. If a patron has an email address in his or her account, Polaris will change the patron's password and send the new password to the patron in an email. Hoffman is going to test the functionality regarding whether or not it asks you to reset your password upon login. UPDATE: Hoffman indicated that it DOES NOT request that the patron change password upon login. Patron may keep this password, or change it. It will change the password in Overdrive as well.

d. Damaged Book Billing

Kallas mentioned that they have a hard time collecting for damage. Nimmer mentioned that options include to use damage for billing for a portion (as in a fine for damage, and keep circulating it), or deem it unusable and mark it lost. Who decides this, and who decides how much is charged for damage? Damaged items are tricky because of so many scenarios; one library may deem it to be a total loss while another could say it was still ok to circ.

A note can be placed in the record to indicate a problem with an item. Use of this note should be used with discretion and not for every item. Notes should be cleaned up and items with damage addressed (CD case replacement, for example) so that items aren't circulating with continual damage or problems. A report can be run to locate notes in bib records.

Kallas mentioned that they do not read most notes. There are too many and they are too busy. She'd like to see another way to note damage, a sticker perhaps?

Bring back next month for discussion.

e. Monarch Catalog Cover Art

More information is needed before meaningful discussion and recommendation can be made regarding the cover art. Hoffman is waiting for more information.

f. Duplicate Patron Check- Options

Name, barcode and birthdate are the default duplicate check options. There are additional options to choose from, Nimmer will send the complete list to the Circulation list serv. Libraries can choose if they want additional options selected for the duplicate check, and Hoffman can add those options when requested.

g. How to Cancel a Hold Once Shipped

Kallas, upon request, developed some instructions on the only way in Polaris to cancel a hold once it is shipped. Klemme was concerned that if libraries do this, the trail who had it

last would not be accurate. The circ committee recommends letting the item come through and use the cancel upon check in rather than use the workaround method.

h. What Happens When an item is deleted

When an item is deleted, it becomes invisible to patrons. It will be caught and deleted by the item purge process. Withdrawn is a status that would be used for your information. Downside is that it is still visible to patrons and would still be counted as an owned item. Useful as an interim process.

i. Renewals- options to limit staff overrides

Some libraries have been overriding renewals with items for holds. Should general circ staff be allowed to override a renewal for items with holds? Or only directors? Hoffman mentioned that several libraries have only one account. The circulation committee will bring this back for further discussion.

j. Address Check/Expired Patrons/Expiration Check terms/Automatic Purging

SRLAAW recommends 18 months for address check. This topic is at the ILS committee for discussion. To be discussed is a preliminary purge for accounts over 3 years expired. As mentioned previously, this could be an auto purge based on criteria or patrons not deleted but placed into a record set for manual review; this will be based on usage. We will wait to hear results of discussion from the ILS committee.

Open Discussion: No further discussion.

Next Meeting: May 4, 2017 at 9:30am at Lomira Quadgraphics Community Library.

Adjourn: Sullivan moved to adjourn. Klemme seconded. Adjourned 12:08 pm.

Respectfully submitted,



Pamelyn Garcia, Monarch Circulation Committee Secretary