

Evergreen Indiana Circulation Committee Meeting Minutes

March 20, 2012

Voting members present: Jill Scarborough, Judi Terpening, Shawn Heaton, Chase Martin, Karen Jewel, Virginia Jensen, Sheryl Sollars, Teresa Hudson, April Gross, Shawn Parker, Rose Bryan, Christina Hime

Members not present: Karen Jewell

Non-Voting Members present: Shauna Borger, Megan Maurer

June 19, 2012 is next meeting.

I. Call Meeting to Order 10:06 am

II. Approval of Agenda Motion Sheryl Sollars, Carried by Rose Bryan
ADDED NEW BUSINESS

1. 6 months age protection in policy and procedures, talked about at Executive Committee Meeting.
2. Noting Bankruptcy in Patron's Account.

III. Approval of the Minutes from January 17, 2012 Motion Shawn Heaton Carried Shawn Parker

Correction to last minutes:

Include Shawn Parker as attendee

Judi Terpin – on page three of minutes there is an incomplete sentence. Contradicts the...,

The complete sentence is: Contradicts the 45-day Notice.

IV. Indiana State Library Reports – Shauna Borger

a. Payment pilot

Daily reconciliation report to be more robust

The way payments are recorded in system is not the way we do it. Georgia Pines just takes a payment- we don't because we take payment for other libraries. We are working out the issues of the Owning Library. Quote from Equinox to recode has not been given to us yet, we are looking for in-house method for daily reconciliation. Reports are pulling correct data but they need work. Aim is Monthly report with reliable total that ISL can send to us. Shauna looks for double payments, that all payments are correct and for each library, Shauna does much proofreading. Now we want to (per EI) invoice on a quarterly basis, but we want to only do this once. Pushing date further into 2012 to get *quality* in software before opening to other libraries. It might be a Fall Date instead of summer. Chase – Has Lebanon gotten a report since March 7? Shauna- follow up to see if that is correct. Daily reports set so that if no payment is taken, no report generated for that day.

b. Ordering barcodes

Ordering Barcodes, we saw in weekly update about order changes. Contract with Creative Data products till February, we have extension, now we work directly with vendor instead of going thru Shauna, vender is working on Website for orders it will be on weekly update log. Change to item barcode prices: "lot fee" charged per quarter for ink and different runs, they pulled it out of patron barcode fee instead of the item barcode.

V. Old Business

a. Follow-up items from January meeting

Christina -Joanna at Jackson County PL is no longer circ, she won't be training the training.

Shawn Parker -- Casey Wente @ Zionsville will be training rather than Shawn.

Shawn Parker - When to delete patrons?

When to delete patrons is up to the library.

- Get list to mark them inactive
- Are inactive patrons pulled into patron reports? No.
- Standards say you have to purge every three years and some libraries don't use paper applications.
- Deceased must be removed from the patron database.
- Shawn Parker uses expired patron monthly and marks them inactive
- Judy Terpening states that expired cards that haven't been used for a year are deleted.

Shawn Parker requested more info about holds. Will a hold be retargeted in 3 days if not picked up by our library? Holds fills our area, then our region. Rose Bryan puts a hold on book today and one of her patrons had hold 3 weeks ago but Roses' hold is filled first. Shawn Parker asked whether that copy been tied to another copy at another library?

April Gross asked questions about holds and proximity. Rochester's copy would not go on hold to branch Aubbee's patron. Same issue with JCPL. Christina Hime gets around that issue by sending new items to the branches to be checked in and then it is sure to circulate there before filling holds at the main branch.

Christina Hime had two questions.

1. Expired patrons- Will we be ever to place holds on expired cards?
2. Will we ever be able to change the pick-up library while an item is in-transit? Example: Jennings county patron puts an item on hold but selects Jackson County - Seymour branch as the pick-up library which is not what they really want. If an item status is in transit and the system does not allow us to change pick up library. Staff must wait to check the item in and then change the pick-up library. What she wants is when item is captured and on its way to library, to edit pick up library while it's in transit. Several

libraries indicated that they usually call the library to let them know that they should send the item to a different library as per the patron request.

April Gross-Can patrons set their default pick up library to something other than their home library in "My Account"? If not, this would be a desirable feature. Shawn Heaton-Is there a report to track unfulfilled holds? Yes, there is a report available. It was suggested that Shawn send an email to the report listserv to find out where it is.

c. Lost Items - Procedures

Christina Hime noted that there is occasionally a discrepancy between the library listed at the top of the billing details and the library who is actually owed the fee according to policy. It is probably damaged or lost items for which this is happening.

Can we have a different option for billing than "grocery" for an appended billing?

It has been recommended that libraries not void billings because you may end up with negative balances. Shawn Parker indicated that libraries working with a collection agency must void appropriate billings because if they do not, their report from the collections agency will not be accurate.

Some libraries do not allow items to be returned after items become lost. Item is returned to circ library, checked in and sent to owning library. One issue that could come up would be that the patron turns in the lost item to transit back to the owning library but the owning library does not accept it so the patron must pay the lost fee AND is entitled to take the book home since they are paying for it but it has already transited back to the owning library.

Notices say to return item, even if item has been returned. Notices imply that patron should return the item, even though it's the money. Wording on notices is awkward.

Is there a report to show if e-mail was sent? Yes. Patron account, "triggered events" to check e-mails. How do we know if e-mail was successful for courtesy notices vs. report e-mails? Tell patron to add to white list. *evergreen.lib.in.us.

Jill Scarbrough reports problems with barcode from other libraries. Shauna Borger suggests contacting your barcode scanner vendor and getting a list of barcode symbologies. Choose the symbology which will accept all symbologies and you shouldn't have a problem scanning all barcodes.

Jill Scarbrough reports that another library marked an item owned by Brazil PL as claims returned. This is a violation of circulation policy. It was recommended that she contact the library directly.

b. Making a patron exempt from 3rd party collections – Policy and Procedures

- EC discussed libraries that use a 3rd party collections. EC said we don't need to add that to function because the 3rd party collections already allow us to do that. function comes from collections, instead of EI.
- Some libraries are changing profile of patron so it doesn't go into Unique

Motion to strike from circulation policies and procedures by Shawn Heaton, Carried Teresa Hudson.

VI. New Business Shauna Borger

a. Bookmobile working group

Suggestion by EC. Book Mobiles libraries would benefit from creating bookmobile working group. Shauna Borger asked the circulation committee for suggestions on how to implement this. Some suggestions include: separate listserv, quarterly working groups, conference calls, add to Weekly Update emails, have a Q&A session at the annual meeting.

Some have satellite which means that they are fully functional. Some must use the wi-fi at the locations where they stop. This means that their check-out sessions are much longer because they often need to use offline mode and the patron experience is of a much poorer quality. There are 4-5 libraries that have bookmobiles in the consortium now and will be more as we continue to grow.

What does 6 month age protection mean as is stated in the circulation policy? It currently states that the item cannot transit outside of the library system however a patron from another library could place a hold on the item and pick it up at the owning library. Is this within policy or do we need to add an additional explanation to the policy? The EC said it was OK for a patron from another library to go to owning library to check new book out or place a hold on it and pick it up at the owning library. Jill Scarbrough suggested adding wording to policy about a patron picking up item at owning library. No motion made.

Christina Hime asks about transiting VHS. Is this acceptable or do the items have the wrong circ modifier? It was discussed by the committee that a videocassette circ modifier does not transit and so the items must have incorrect circ modifiers. It may also still be a bi-product of the de-duplication script as many items were merged onto records which would have assigned incorrect circ modifiers.

Bankruptcy Procedure - Megan Maurer

What is our policy on bankruptcy? Should we add something to the policy and procedures? Should it be recommended that the account billings are cleared. Some libraries just leave the patron's account until after the bankruptcy is formally approved.

Sheryl Sollars asked about the print receipt button in the corner of one screen that does not print but closes the window instead. She will follow-up on this and get more information.

April Gross asks if the Apply Payment button in the Patron Account > Bills can be set not to be the default button on the page as sometimes RFID will cause a barcode to be scanned when the patron account is open and the barcode will be incorrectly applied as a payment.

VII. Announcements

a. Migrating libraries

April 11, 2012 – Akron Carnegie Public Library, Camden-Jackson Twp Public Library, Montezuma Public Library

b. Shelby County migrating in May

Motion to adjourn Judy Terpening, Carried Shawn Parker

June 19 is next meeting.