

Evergreen Indiana Circulation Committee

June 19, 2012

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

Members not present: None

Non-Voting Members present: Shauna Borger, Megan Maurer

I. Call Meeting to Order 10:10 AM

II. Approval of Agenda Chase Martin added an item to the agenda: e-mailing checkout receipt. Motion Judi Terpening, Carried by Shawn Heaton.

III. Approval of the Minutes from March 20, 2012 Motion Rose Bryan, Carried Chase Martin.

IV. Indiana State Library Reports

ITEM 1: Holds – Does the system retarget a hold automatically every 72 hours?

Holds are targeted every 15 minutes. Once a person's hold gets checked (and fails) there is a 48 hour delay before it's checked again. This is to prevent overload in the system.

ITEM 2: Expired patrons cards – Placing a staff client hold on an item. Hold doesn't go through and there isn't a cancelation notification.

Run the unfilled holds report to find out what holds are not being filled. Target library should retarget the hold if they cannot fill it within 24 hours. Unfilled holds are deleted every 9 months.

ITEM 3: Can you change the pick-up library while the item status is In-Transit?

No, but in 2.2 patrons and staff will be able to set default holds pick-up library.

ITEM 4: Billing fines and fees summary in the circulation policy and procedures. The library name that displays in the bill details is the library from whom the billing was generated but double check just to be sure.

ITEM 5: Voiding items vs. Forging items. Can the void permission be restricted for a Circ2? Yes, Circ 2 does not have the ability to void a payment (Permission: VOID_BILLING).

A question came up in the Evergreen Indiana Circulation Committee regarding our recommendation that EI libraries Forgive rather than Void overdue, lost, damaged or misc. fines and fees. The question was: Is there a conflict with this practice and anything that the SBoA might require in terms of budget reporting (ex. Annual Financial Report)? It seems the answer is that if

you are forgiving/voiding lost or damaged fees, it is important to note these as they will affect your reported capitol-asset value of the collection. However, there is no important distinction between voided and forgiven fees overall.

From the June 6, 2012 Budget Workshop at ISL: In John Eppley's presentation of Gateway of the AFR at 2011 Bookkeeping Workshop (presentation is on LDO Workshop page), he talks about accounting being done on a cash basis. This is important to understand for what follows regarding fines, if the fine money is not in your account you can't report it. This does not mean a library should not track this loss, not necessarily as revenue but as depreciation of the capital asset—value of the collection.

John Eppley from State Board of Accounts said, "Ignore unpaid fines for receivables."

ITEM 6: Changing wording in 45 Day Notice

What do you think of removing the 45 Day Notice statement: "Please return these items to the library and contact the library to make payment on your account?" A possible replacement statement is: "Please contact the library to make arrangements on your account."

The updated paragraph would read: "The cost of the item(s) noted above is an estimated cost. The actual cost may be higher or lower than stated. Please contact the library to make arrangements on your account. If you do not take action within 15 days of the above date, the library is authorized to assign your account to a debt collection agency. An additional fee will be charged for this service."

Motion to reword late notices by Christina Hime, Carried by April Gross.

ITEM 7: 6-month age protection

Able to place a hold on Shelby County 6-month age protected item for Plainfield patron with pickup location as Shelby County and a workstation registered to Plainfield with a LocalAdmin login.

Able to place a hold on Shelby County 6-month age protected item for Plainfield patron with pickup location as Shelby County and a workstation registered to Plainfield with a Circ1 login.

Plainfield patron able to log into My Account and place a hold on Shelby County 6-month age protected item with pickup location as Shelby County.

ITEM 8: Bankruptcy procedures

Distributed at the meeting.

ITEM 9: Can a different box be active on the Patron Account bill screen rather than the amount paid box to avoid accidentally scanning the barcode into the payment made? Not possible. Would require development. Another option: Upon taking the first payment, set the checkbox to annotate.

V. Old Business:

Advanced Circulation Training: Training has been finalized and will be offered in webinar and onsite format initially in August and quarterly throughout the year. Bookmobile training has been added in the form of standalone module training.

VI. New Business

Minimum patron information: Required patron information on registration screen has changed since 1.6 and now several fields are not required. This is causing problems in verifying patrons who move from one EI library district to another which is supposed to be one of the benefits of joining the consortium. Committee suggests investigating what information we could require at the system level and recommends birth date and one telephone number. Also, Shawn Heaton wrote a circulation tip about entering patron data accurately and in greater detail (middle initials, birthday, etc.).

Redefine “in good standing”: In good standing means that the patron does not owe more than \$10. Rose Bryan suggests lower that requirement to \$5 as many patrons will pay just under \$10 in order to fall into the “in good standing” category and have all patron privileges. The committee did not generally support the idea of lowering the payment amount, feeling instead that, no matter what the amount was, many patrons would still pay the bare minimum and reap the rewards of full privileges.

Adding patron photos to the patron database: This will not be available in Evergreen 2.2 but we will put it on the wishlist.

Address verification for patrons who have moved but are still within your library district: Shawn Heaton noted that their library requires prove of address from patrons who move from one address to another within their library district. He wondered what other libraries do. Many expressed that they also require official proof of residence as is required upon initially registering for a library card.

Step Parents registering children: Shawn Heaton asked how other libraries deal with a step-parent registering a child. The issue is that the last names are not the same and so you might have a conflict in knowing what the relationship is. Linking their cards was suggested.

Members rotating off the circulation committee: The following members have fulfilled their membership term and will be leaving the committee on June 30th: Rose Bryan, Jill Scarbrough, Chase Martin, Sheryl Sollars, Christina Hime. We will be looking for new members who we will approve next meeting. We will also need a new chair, chair elect, secretary.

VII. Announcements

Migrating libraries: June 26, 2012 – Shelby County – Morristown branch going live. Catalog freeze June 21 AM – June 26 AM.

VIII. New Meeting: Tuesday September 18th.