Circulation Committee

13 December 2012
Greenwood Public Library, 10.00 a.m.

Voting Members Present:

Judi Terpening, Switzerland Public Library
Karen Jewel, Greenwood Public Library
Virginia Jensen, Mooresville Public Library
Shawn Heaton, Alexandria-Monroe Public Library
Barbara Bonney, Jay County Public Library
Vanessa Martin, Greensburg Public Library
Virginia Hilbert, Hussey-Mayfield Memorial Public Library
Sandy Rowland, Westfield Washington Public Library
Jennifer McKinley, Morgan County Public Library
Brandy Graves, Shelby County Public Library

Voting Members Absent:

April Gross, Fulton County Public Library
Jamie Tyner, Linton Public Library

Non-Voting Members Present:

Shauna Borger, Indiana State Library
Adam Bowling, Indiana State Library
Megan Maurer, Indiana State Library
Bill Anderson, Indiana State Library
Linda Shreve, Jay County Public Library
Christina Hime, Jackson County Public Library

I. **Call Meeting to Order** 10.05 a.m.

II. **Approval of Agenda** (Graves / Martin)

III. **Approval of the Minutes from July 19, 2012** (Martin / Graves)

IV. **Indiana State Library Reports**

a. **Kid's OPAC –** Shauna handed out test sheets and asked the Committee to appraise the Kid's OPAC and then record the results. If possible, she would like to have our feedback before the next meeting.

b. **OPAC Committee –** Shauna and Carly Schull updated the Help document with new screen shots and revised wording, such as saving the patron's checkout history under My Account.

c. **New Evergreen class –** ISL will soon be offering a two hour webinar for Holds, which is worth 2 LEUs.

d. **Regional training –** Training will be done quarterly by the regional trainers at libraries within each trainer's territory, instead of at the State Library. The training will be in Circulation, Cataloguing, and Local Admin Reports.

e. **Train the Trainer for Circulation** will follow the next Circulation Committee meeting on Tuesday, 19 February, 2013.

V. Old Business

a. **45 day notice wording change** – This change has been made.

b. **Bookmobile working group –** The first meeting will follow the Circulation Committee today at 1.00 p.m. The group will decide how often and where it will hold its future meetings.

c. **Allowing a driver's license if a library card is forgotten –** A note from Alexis Caudell of the Mitchell Community Public Library was read, requesting the Committee to consider allowing patrons who forget their library cards to check out with a driver's license. The Mitchell Library is in a rural area, and many of her patrons do not come to town more than once a week. She would like to see this policy changed in the interest of good public relations and patron service. Some of the points raised against allowing the alternate ID included staff members getting the wrong patron account and checking out the books on someone else's library card, and added work on staff. A motion was made to keep the policy as it currently stands: the patron must have his library card to check out. (McKinley / Jensen)

VI. New Business

a. **Review Circulation Policy, Procedures, and Manual –** Several additions and modifications were made to the current documents. [Please see Attachments A & B for these changes.]

b. **Patron color outlines –** The colors orange and light blue and what they mean have been added under procedures. [Please see Attachment B.]

c. **Policy questions about multiple Reciprocal Borrower cards in consortium –** If a patron has more than one card, the checkout library may want to check the patron's other account to be sure they are in good standing (eg. don't owe fines or have failed to returns). The decision to do this is left to local library policy.

d. **Claims Never Checked Out setting: Turn on request –** This function should be tested before it is turned on. The Committee recommends that, unlike the Claims Returned function which has a limit of three per patron, the Claims Never Checked Out function should go by transaction date rather than by number of items. Each patron should be limited to three Claims Never Checked Outs. It appears that this problem occurs with many libraries that have self-service checkouts. When a patron forgets to log off his account, the next patron in line may scan his card and, without realizing it, check his items out on the previous patron's account.

e. **Spring Circulation Roundtable –** Possible topic for discussion is the Claims Not Checked Out function.

f. **Need representative for Class C library, serving until 30 June 2014 to replace Teresa Hudson –** We need at least two nominees. Judi Terpening and Vanessa Martin have volunteered to serve as the Nominating Committee.

g. **New circ modifier –** Could a new circ modifier be added for the kids cd sets? This would alleviate security issues and possible damage to the items when checking out through the self-checks. The general consensus was that this is probably not possible.

h. **Get your password option under My Account –** The "Forgot your password" option is not working, and patrons are not receiving the e.mails for resetting passwords. Shauna will follow up with this.

i. **Hold notice (e.mail or telephone) –** Can some wording be added that says, "A fee may be assessed if you do not pick up this item within 7 days."?

j. **Difficulties in placing holds –** At times when staff are placing holds for patrons, the patron login screen appears. Backing out of the hold and trying again does not solve the issue. Logging off Evergreen and then logging back in seems to take care of the problem. Shawn gave a screen shot to Shauna.

k. **Could an invalid button be added for incorrect mailing addresses (as with the e.mail or telephone)?** – Shauna will look into this.

VII. Announcements

a. Migrating libraries – Westville-New Durham Township Public Library, Peabody Public Library, and Peru Public Library.

b. The 2013 meetings were tentatively set for 19 February, 21 May, 20 August, and 15 October.

VIII. Motion to Adjourn (Martin / Graves)

Attachment A.

(Page 2 of Evergreen Indiana Circulation Policy)

REGISTERING A PATRON
Evergreen Indiana Library Card

An Evergreen Indiana library card is required in order to check out materials at an Evergreen Indiana Library. Library directors and managers have discretionary ability in special cases. A digital replica of the library card is also an appropriate form of identification for a patron to check out materials. Patrons of the Evergreen Indiana Consortium libraries presenting the Proper Identification are eligible to receive an Evergreen Indiana library card from their home library subject to certain limitations (*see below*, Loss of Privileges). An Evergreen Indiana library card is not transferable to another user.

Proper Identification must be presented to apply for an Evergreen Indiana library card.

Proper Identification is one of the following:

- a valid Indiana Driver's License which displays a current address;
- valid Indiana State ID which displays a current address; or
- a current government issued photo ID (e.g., military ID, passport).

(Page 3 of Evergreen Indiana Circulation Policy)

If the presented Proper Identification does not display a current address, the applicant must present one item from the Recommended List in addition to the Indiana Driver's License, Indiana State ID or other government issued photo ID presented as Proper Identification. The ID presented from the Recommended List must include a current address.

Recommended List of ID includes:

- valid voter registration card,
- ~~valid current government issued ID (e.g., military ID, passport),~~
- apartment lease signed within the last 30 days
- bank statement issued within the last 30 days,
- utility bill issued within the last 30 days, or
- property tax receipt.

My Account (Page 4 of Evergreen Indiana Circulation Policy)

Library patrons will be given a PIN upon registering for an Evergreen Indiana library card. Evergreen Indiana policy indicates that PINs may only be given in person at an Evergreen

Indiana Library, upon presentation of appropriate identification. PINs may not be obtained via telephone or email.
At their first use of the *My Account* feature of the OPAC, it is recommended that patrons change the PIN to a minimum 7-character password. Patrons may also choose to select a user name to use in place of the library card barcode when accessing *My Account*. User names must be unique within the Evergreen Indiana system and must be used to log into My Account henceforth. Patrons may change user name, password, and email address with *My Account* at any time.

(Page 6 of Evergreen Indiana Circulation Policy)

In addition, a library may place a six-month age protection on new items. This means that non-local patrons may place holds but the holds will not be filled until the six-month age protection expires. Local patrons may place holds on such items.

Patrons may place their own holds via the OPAC, and may select their pickup location and notification method. The software will refuse holds requests which do not conform to Evergreen Indiana policies. Patrons may choose any pickup location for holds.

Patrons whose Evergreen Indiana cards are "blocked" or "barred" will not be allowed to place holds until their card privileges are restored.
Adopted by the Evergreen Indiana Executive Committee on: December 14, 2012.

Attachment B.

(Page 5 of Evergreen Indiana Circulation Procedures)

If the presented Recommended Identification does not display a current address located within the library district, the applicant must also present one item from the Recommended List to establish residency. The ID presented from the Recommended List must include a current address:

- valid voter registration card
- ~~valid current U.S. government issued ID (e.g., military ID, passport)~~
- computer generated bank statement issued in applicant's name within the last 30 days
- computer generated utility, credit card company, doctor or hospital bill, issued in applicant's name within the last 30 days and containing address of residence
- Medicaid or Medicare benefit statement issued in the applicant's name within the last 30 days
- Change-of-address confirmation from the United States Postal Service showing prior and current address of residence (a P.O. Box is not acceptable as a residence address)
- apartment lease signed within the last 30 days
- property tax receipt issued in applicant's name

(Page 6 of Evergreen Indiana Circulation Procedures)

My Account
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At their first use of the *My Account* feature of the OPAC, it is recommended that patrons change the PIN to a minimum 7-character password. Patrons may also choose to select a user name to use in place of the library card barcode when accessing *My Account*. User names must be unique within the Evergreen Indiana system and must be used to log into My Account henceforth. Patrons may change user name, password, and email address with *My Account* at any time.

Replacement Card
The procedures for issuing a replacement library card are the same as the issuance of the original library card. *See above* "How to Issue an Evergreen Indiana Library Card" for application procedure and identification requirements. There is a $2 fee for a replacement card that can be paid immediately or billed later depending on local library policy.

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Evergreen Indiana Patron Moves to another Evergreen Indiana Library System
If the patron moves from one Evergreen Indiana library system to another, issue a new card to that patron and, change the home library of the patron from the old library system to the new library system when you update identification, address, email and telephone information in the patron record. The patron will now be included in reports of all patrons registered in the new home library system. A patron should be encouraged to pay all fines and fees prior to moving his or her account to a new library district.

~~If a patron moves from one library to another within the same system, the home library should be changed in the patron record as well as updates to the identification, address, email and telephone information. The system looks at home library, not the card prefix, in determining where a hold/loan should be sent.~~

(Page 8 of Evergreen Indiana Circulation Procedures)

Borrowing Privileges
A patron must present a card in good standing to borrow materials. Any and all accounts linked to the patron may be reviewed to determine whether they are in good standing. A digital replica of the library card is also an appropriate form of identification for a patron to check out materials. If a library staff member questions the digital replica, staff have the right to ask the patron for a photo I.D. A patron's card will be blocked, and no services may be obtained with it if the patron has 15 or more overdue items, or owes $10 or more in unpaid fines and/or fees. Outreach patrons will not be blocked until they have 50 or more items overdue.

Delinquent borrowers who have not reached these limits may still borrow materials; the system operator will be notified that the patron is delinquent. The number of overdue materials and/or amount of fines/fees that will result in a patron being "blocked" is calculated at the consortium level and not at the library level.

The staff client displays patrons in good standing in "green." Patron accounts displayed in "orange" indicates there are fines or overdues and a "purple" display indicates that the patron has hit the fine or overdue threshold and is now blocked. Barred patrons display in "red." "Turquoise" indicates that there is a message on the account. "Gray" indicates that the patron account is expired. "Black" indicates that the patron account is inactive.

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Although holds may not be placed on the above materials by a non-local patron, these items *may* be borrowed by any Evergreen Indiana library card holder who has privileges at the owning library. The item must be checked out at the owning library. The patron may return such materials to any Evergreen Indiana library for transit to the owning library.

In addition, a library may place a six-month age protection on new items. This means that non-local patrons may place holds but the holds will not be filled until the six-month age protection expires. Local patrons may place holds on such items.

(Page 15 of Evergreen Indiana Circulation Procedures)

Member Library Support and Communication
Each Member Library is required to have one staff member subscribed to the Evergreen Indiana Support ListServ. Subscription requests may be submitted at: http://lists.in.gov/mailman/listinfo/evergreen_support.

Each Member Library is required to provide the name, email and phone number of a staff member who will serve as a contact person for circulation questions from another member library. This information should be provided to the Evergreen Indiana project manager for distribution to the member libraries.

Modified by the Evergreen Indiana Circulation Committee on: December 13, 2012.
Adopted by the Evergreen Indiana Executive Committee on: December 14, 2012

(Page 18 of Evergreen Indiana Procedures)

APPENDIX B
Request for Patron Record Merge

The Evergreen Helpdesk does not accept individual requests for patron merges. Patron merge requests should be sent to the Evergreen Helpdesk weekly using the Patron Merge Request Form. Please attach the form to the helpdesk ticket.

~~Merge requests will be processed once a week each Monday. Merges submitted by 11:59 p.m., Sunday, will be processed on the following Monday. Requests received after such time will be processed the following week.~~

~~Since the helpdesk does not allow for attachments, please email the spreadsheet to Mike Peters at mrpeters@library.in.gov.~~

~~Use the following subject line exactly as follows. The email account will be set to filter the merge requests and if the subject line is incorrect, the request will not get picked up.~~

~~The following format is required for the subject line:~~

~~SHORTNAME - Patron Merge Request - MM/DD/YYYY~~
~~Ex: ISLI - Patron Merge Request - 08/24/2009~~

If multiple libraries are involved, be sure to include the necessary authorization on the spreadsheet (staff name and email).