FALL 2013 PATRON SERVICES ROUNDTABLE - TRANSCRIPT

PRESENTED LIVE OCTOBER 29, 2013

SLIDE 1: FALL 2013 EVERGREEN INDIANA PATRON SERVICES ROUNDTABLE

[*Shauna*]

Good Morning everyone! This is Shauna Borger at the Indiana State Library. Welcome to the Evergreen Indiana Patron Services Roundtable Fall 2013. As many of you know, we are offering Patron Services roundtables twice a year, and so this is the fall roundtable to follow up the spring roundtable which was a billing focus.

I'm here joined here at the State Library with Virginia Hilbert from the Hussey-Mayfield Memorial Public Library and our Evergreen Indiana coordinator, Anna Goben.

So let's get started. So our focus today is managing patron records and cleaning up the patron database. And some of the things that we'll be looking at…hold on just one moment everyone…sorry about that. Just a slight complication there, we want to make sure we have the most recent updated presentation for you here. (2:40)

SLIDE 2: AGENDA

So, let's review the agenda today. We will be first of all be talking about patron record migration. Now, some of you have been with us for quite some time, and some of you are new. And so the members that have been with us a for a while will remember what the database looks like after we bring on libraries, you know, new libraries and especially groups of libraries as we've done. So we'll talk a little bit more in detail about patron records, how they migrate, and how that works.

We'll also talk about merging patron records. As we all know one of the results of migration is that we get duplicate records. Sometimes those are valid duplicate records, and sometimes they aren't. So what do we do when we see those duplicate records?

We will talk about patron registration. And we will talk about paper registrations and retention schedules. And we will talk about patron database records, so, your digital patron records, and the standards and Indiana Code requirements on that.

We also have some good news. We are…have been talking about for several years now figuring out a system whereby our inactive patrons are automatically deleted, and so we have some good news to share with you about that. So we will do that later on in this presentation.

We will also cover some helpful reports to help you with your records management. (4:20)

SLIDE 3: PATRON RECORD MIGRATION

So, patron record migration.

Now, when a library joins Evergreen Indiana, those patron records are added to the patron database with no de-duping script. And many of you know that when a library joins Evergreen Indiana, we work to get their old data lined up with the Evergreen standards. And for the MARC records, there's a de-duping script that runs to match the legacy MARC records with our Evergreen MARC records so that we don't have a lot of multiple duplicate MARC records in the system, which clutters up the database and makes it difficult for both circulation staff and library patrons to understand what's actually available in the catalog. We do not run a de-duping script on patron records. And the reason is, patron records are much more complicated oftentimes and need staff members to assess whether or not to merge those duplicate records. It really requires human intervention to be able to make that assessment.

So what I have here is a screenshot below. And many of you this looks familiar to many of you. It is the…I've done a search for the first name "Shauna", last name "Borger" .

Now we were joking before we got this webinar started. It looks like I'm a really bad staff member or really bad patron. But this is obviously an extreme example.

So, you can see that there are a lot of "Shauna Borger" records, just based on searching the first name "Shauna," last name "Borger." And the other thing that we can tell right away from the search results is that these are all different records somehow. They all have different library card barcodes. And just by quickly looking at that you can see that two of those barcodes are actual patron records and many of those usernames or barcodes are staff accounts or what we call professional accounts. Another way that we can tell that these are different accounts is by looking at that date of birth, which is that first column there. Really just quickly looking you can see that some of the accounts do not have a date of birth listed there and some of them do. And just quickly looking down there you can see that some of the date of birth entries are the same and some of them are different.

So those are just a couple of different ways we can quickly assess and search for duplicate patron accounts. (7:13)

SLIDE 4: ASSESSING ACCOUNTS

We do have a couple of reasons why there would be valid duplicate patron accounts.

So, some of our libraries…and we do have valid multiple reciprocal borrower accounts. We have situations where one patron may have several reciprocal borrower accounts in the Evergreen Indiana database. One example is that there are some libraries who are close to one other Evergreen library and one other non-Evergreen library, but you have reciprocal borrower contracts and agreements with all of those three libraries. What happens is a patron from the non-Evergreen library may have a reciprocal borrower account at both of those Evergreen libraries. And some of you this does not apply to, but those of you that it does apply to do understand what I'm describing here. It can be very confusing for staff members. And the important thing here is that you have a couple of different options here to deal with those accounts. You can place an alert on their account to ensure that your staff members understand what's going on here. You can also group those accounts together if you want to deal with those that way. But the point is those are valid duplicate reciprocal borrower accounts.

Another valid duplicate account that you may see in the Evergreen database is a resident card and also a non-resident or a PLAC account. This has become increasingly apparent now that there are more and more downloadable econtent opportunities for patrons at different libraries. Each of our libraries oftentimes has different econtent, and patrons have figured that out. And they want to get access to a particular library's econtent. So what the OverDrive Committee…and now OverDrive Committee is named the eContent Committee…has decided is that the non-residents and PLAC users of the eIndiana Digital Overdrive Consortium [eIDC] are allowed to purchase a non-resident or PLAC card at participating libraries and download that econtent from OverDrive specifically. Now, unfortunately this doesn't make it any less confusing necessarily because in the future we may need to change that policy due to OverDrive licensing or any other econtent vendor licensing. We need to approach those situations individually, and we always will keep everyone updated in the weekly blog, the Weekly Update blog, if we have any changes on that. But the important thing to know is that you may see patrons with a resident card at one Evergreen Indiana library and a non-resident or PLAC account at other libraries. They've purchased those cards most likely to be able to access that library's downloadable econtent in whatever form that may be.

And I'm going to hand it over to Virginia Hilbert to talk about the next portion.

[*Virginia*]

Good Morning Everyone. I'm going to talk about what happens when a patron moves from one area serviced by an Evergreen library to another area serviced by a different Evergreen library. And hopefully we're going to talk about a way to prevent duplicate records from being created in the first place. When patrons move, they often just come into the circulation desk and they say, "Hi, I'm new to the area, and I would like to get a library card!" So, one thing that you can do when you're talking to that patron is welcome them, like I often say, "Welcome to Zionsville! We're happy you're here." And you ask them, "Where did you move from?" And often that will start a conversation about, let's say they moved from Greenwood, so automatically you know they might have a Greenwood Evergreen card. So you want to look in the patron database to see if they have that. If for some reason you go ahead…you can't hear me, sorry…and that was such a good story too! Let's say you start the registration process while you're having that conversation. Often if you enter the patron's name, you'll see that screenshot that says that you have one patron already in the system with that same name. That's going to let you know, that you need to pull up that old account and just update that account. Let's see. Okay.

You're just going to update that account, and you're going to change their home library and prevent that duplicate record from being created. Let's see. (12:36)

SLIDE 5: MERGE REQUESTS

Now we're going to talk about…let's say that you did not do this process, and you created a duplicate account. And we're going to talk about the merge requests that you now have to complete.

[*Shauna*]

So sometimes what happens is a…since when we migrate our patron records, they do not get merged right away, sometimes what happens is you will see that there are two accounts right away, and there has been no intervention on your part. Sometimes we may accidentally create a new account without realizing that there was a previous account. So what do we do if we have two accounts that we do want to merge?

All member libraries have to consent to the merging of the records. And we've provided a spreadsheet that we'll go over in the next slide that both libraries must agree to and basically sign off on. And that's what this joint request to merge the records is. You can open up a Helpdesk ticket and attach this merge request to the Helpdesk ticketing system. And if you need help with that, we can certainly assist you in doing, in doing so.

We also have…(*coughs*) excuse me…we have opportunities throughout the consortium where multiple libraries have agreed locally on allowing merge requests without formal agreement necessarily. You will know if you are one of these libraries. It does not apply as a blanket statement to all libraries in the consortium. If you are interested in creating this sort of local agreement with your other Evergreen libraries, certainly approach them and have that conversation. It can help save you a little bit of time and paperwork. But there are multiple libraries who have these local agreements on merging patrons, and they don't approve those sheets individually necessarily. The important thing in all of these situations, whether you have a local agreement on this or not, is to create a paper trail so that when your library staff members get questions, it's very easy to go back and find out what was done when. And sometimes that really just means saving the Excel spreadsheet before...or in a locally known location so that, when you have these merge requests, you can easily go back and find that spreadsheet. (15:26)

SLIDE 6: MERGE FORM

So some of you…for some of you, this spreadsheet looks familiar. This is our merge form. It's available for download on the ISL website. Column B here…I'm going to go through and highlight each of these columns to make it easier to explain what needs to be filled in each of these columns, but we do have two of these rows filled in as examples. So Column B shows barcode #1; this is the first barcode that will be deleted. So in this first example, we have three accounts from Joe Smith, and we have one of the accounts that we want to merge those other accounts into.

Barcode #1 you see in Column B, highlighted in red here, starts with 52346. This is the duplicate account that needs to be merged. In Column C here, this is our second barcode of Joe Smith's that needs to be merged. And then, we do give a third column, but you may or may not need Columns C and D, just fill in whatever information you can. So we see in this example #1 in fact Column D is not filled in, because there is not a fourth barcode that need to be merged in.

We finally get to Column E, and this is the resulting barcode. This is the main barcode that we want that patron's, the main patron account, to reflect. So this barcode starts with 27895, and that will be the final barcode that Joe Smith uses. So it's most likely his most current card that he's using; it's on his keyfob, and this is what we want his main barcode to be.

Column F shows the resulting home library shortname. We all, I'm sure, have those memorized with our INfoExpress and our transits; we can remember our shortnames. So the resulting home library shortname should be reflected in the prefix of the resulting barcode.

Column G includes the approved home and other library so you would insert the name and the email address of the staff approving the merge. And then…Whoops! Let me go back really quick.

Our final column is H, and feel free with regards to creating a paper trail. Feel free to include notes in this field that you think are relevant. So "you contacted so and so by the phone at such and such a library on such and such a date." Having more information is going to really help you when you get questions if you do need to work backwards and answer any of those questions about a merge request that went through. (18:46)

SLIDE 7: MERGE REQUESTS – SAME LIBRARY

[*Virginia*]

Okay, this is Virginia again. We're going to talk about merging multiple accounts under the same home library. So let's say you have Joe Smith, and, for some reason, he had an account maybe that has not expired yet, but he came into the library and got a second account. He lost his card and just thought he'd get a new account. Didn't realize he needed to just let us know, so…

That has to be done under your localadmin login, so make sure that you have that ready when you go to merge a patron account. You're going to look under the patron search tab, and make sure that you're looking in all of Evergreen and that your "Include inactive patrons" box is checked so that you get all accounts under that name. You'll see here that we looked for Liam Lee, and he has two accounts. Right now we're just seeing both of the accounts, but you're going to want to review all the information on each of those accounts and determine that they are definitely the same person. If you have the person, let's say, prior to this standing in front of you at the desk and they're wanting to get a new card or let's say they want to update their account and you look for this like we all probably should look for duplicate accounts and you found this. Have a conversation again with the customer and talk to them. You will…I don't know if I have another screenshot that shows it…but this customer actually has two different parent names listed on the accounts, and they both have different last names. And I know that's pretty popular now, that's going to happen. So we just have a conversation with them; talk to them about it, and say "Oh, it looks like you have another account, possibly opened by …" and generally most customers are going to say "oh, yeah that's theirs mom" or "that's his dad" and "yeah, we used to live there."

Once you determine that it is the same person, you have this screen open with both of their names, both of the accounts listed, you're going to highlight both accounts, by holding that control button on your computer and then clicking on the second account. As soon as you have both of them clicked, you can click on the merge button that's highlighted up there on your screen, and then this window is actually going to pop up. And you're going to have to determine which of the accounts is going to be the lead account or the barcode that is currently active. The other one is going to be removed. So once you have determined which of the accounts is the lead account you can see where you have to select that circle at the top of the account listing. And then once one of the accounts has been selected as the lead, you're going to be able to hit that merge button in the top left hand quarter.

Now I don't have a screenshot for it, but you're going to know that it's actually occurred, that the merge has happened, because your screen, your search screen for the patron search, is going to only show one account under that name.

I think Shauna is going to do staff accounts now. (22:08)

Q&A 1

[*Shauna*]

Before we get to that are there any questions about merging patron accounts or anything we've discussed so far? Please go ahead and type into the chat if you have any questions.

We'll give everyone just a couple of seconds here to get their questions typed into the chat box.

Okay, please feel free to go ahead and type in the chat box if you have any questions, otherwise we will try to stop throughout the webinar to take questions periodically.

Colleen McCarty: We have a patron who owns property in 2 evergreen library areas. she has a resident card from each. Is this OK?

Colleen, we're going to have to follow up on that. We have addressed this question before. Our legal consultant here, Sylvia Watson, has addressed this question before, and I would like to have the opportunity to actually get that verbiage directly from her and then share it with the consortium that way. So we will follow up on that, and we will share that with all participants of this webinar.

Are there any other questions about patron accounts or registration or merging before we move on? (24:27)

SLIDE 8: STAFF ACCOUNT

Okay, staff accounts.

We know that we have two different types of staff accounts, one for personal use and one for professional use. And these are valid accounts that library staff are allowed to have.

Staff personal accounts should be assigned using the staff member's personal information and given the permissions of "StaffCard" if the library chooses to offer this fine-free status to their employees. So, many of us already know that the StaffCard does negate any of the overdue fines. It does not exempt staff members from lost or damaged fees. Library staff are still responsible for that. But it does negate those overdue fines.

Professional accounts, we're talking about our Circ1s, our LocalAdmins, our Circ2s, our Cat1s, Cat2s. Those accounts are your professional accounts and, for many of you, your regional coordinators and ISL staff have created those for you and distributed those to you on your go-live day. These can also be assigned by the LocalAdmin if you choose to use something other than the generic professional accounts. The LocalAdmin can choose to create specific professional accounts for each library staff member, should they choose to do that. And these professional accounts are assigned based on the completed training level of the library staff member. So those that attend the Basic Circulation class receive the Circ1 username, for example, and when you're filling out these professional accounts you can just fill in the professional address and contact information and these should never be used for personal circulation transactions as well.

Now some of you will remember, those of you who have been with us for a while will remember, that we received the ability to delete accounts when we upgraded, I think it was, to 2.2. And the important thing with regards to the staff personal accounts and professional accounts is specifically with those professional accounts not to delete those accounts. The best thing to do for those is, if it is a specific professional account and no one else is using it at your library, you can change the password to protect the system and then just mark that account inactive.

So, do we have any questions about that specifically? It's important not to delete those professional accounts.

Okay. (27:36)

SLIDE 9: PATRON EDIT SCREEN: PART I

[*Virginia*]

It's Virginia again. We're going to talk about updating an account, similar to what I discussed earlier about when you have a patron approach the desk with wanting to get a new card. They also might approach the desk and actually have their card in hand and say that they have moved or they may just need to renew their account and, let me see, we're just going to go through confirming all the information in the required fields. You'll remember that when you're doing this, the required fields are yellow, so that is a really quick easy way to check that you've entered all the information into those fields. If the account has expired and has been marked inactive, then you're going to have to remember to go in and put a check mark in that Active box. Otherwise your customer is not going to be able to check out, you're not going to get that green color around their name because something is still wrong. Can you tell I have done that many times myself?

Here is just the edit screen and, as you update a customer's account, again the screens are green for the required information on this screenshot, but obviously you're going to have the barcode and if you need to change that barcode you can go ahead and do that by hitting the "Replace Barcode" button. That does not change their client login that they've chosen. So that can remain the same. You don't have to update that. You can update the password if you wish, or they can leave it the same as it has always been.

Let me see, obviously their name. And again, if you're entering their name, and you get a pop-up, even if you're just updating an account, and it says there are other patrons with the same name, you probably want to go in and click on that alert to bring up that patron search screen and double check to see if you have duplicate accounts there.

Okay, there's my active box that sometimes seems hidden when you're looking for it.

SLIDE 10: PATRON EDIT SCREEN: PART II

You also want to see if the barred button has been checked. If a customer's account has been barred for some reason, we should have an alert listed in that alert message box to let you know what the problem was what needs to happen before you completely update their account and make it active again.

Obviously we must have the mailing information so we can let them know when they have overdue books.

And the statistical categories, make sure that you enter all of the required information there. Some of those are required, but some are not.

And if you are updating an account…let me go back really quickly…to…because they have moved, you want to make sure you enter your library in that Home Library field and have that correct permission group listed. Sorry, I'm making you watch everything twice. (31:00)

SLIDE 11: PAPER REGISTRATIONS

Okay, we're going to talk about paper registrations.

[*Shauna*]

Okay.

So we know that paper registrations, there are pros and cons to paper registrations. And we'll talk about that real quick here, but if you could first just fill out the poll so we can know how many people are actually still using paper registrations and how many people have done away with them. And we'll talk a little bit about the pros and cons and then give some examples of libraries who do one and the other.

Okay, interesting, it looks like using paper patron registrations is winning by quite a bit. 80% use paper registrations, almost 90%. And about 10% do not, so that's interesting. Thank you!

So obviously there's pros and cons to using paper registrations and we will talk about, we will talk about the retention schedules and the information if you do want to use those paper registrations. But the, one of the biggest pros to those paper registrations is that it allows staff to go back later and double check the digital data entry for accuracy. So we know that for our patrons, a lot of times, if they do not receive an email, an automatic email from the system, there are a lot of reasons why they may not have received that email, but one of those reasons may be a mistyped email address. Or if they do not receive their phone call to notify them that a hold is available, that may be a data entry era, error, excuse me. And a lot of libraries have systems in place so that they can catch those mistakes before they become a patron service issue.

For example, I have heard of libraries who have the patron registration filled out, they throw it into a little bucket after it's filled out and staff members go back later on when they have a few minutes here and there to double check the data entry. And from there then, they'll go ahead and file the patron record. So that gives them a safeguard against any inaccurate data entry there.

Obviously, some of the biggest cons of creating those patron paper registrations is figuring out how to dispose of those records. There is a retention schedule posted here at this url that you can access (http://www.in.gov/icpr/files/county_library.pdf). And basically what it requires is that those patron registration records cannot be destroyed until the Notice of Destruction, State Form 44905 is filled out and copies of that form are distributed to the clerk of the circuit court of the county and to the Indiana Commission on Public Records. And the important thing to note on this is receiving a response before you go on ahead and destroy those records. So the instructions for that are to make sure that you fill out that form, distribute it to the correct parties, receive a response and then you are able to destroy those records.

And actually I'll take the opportunity right here to allow Virginia to talk about how her patron registration management at Hussey-Mayfield Memorial Public Library.

[*Virginia*]

Yes. At Hussey-Mayfield, we have decided years ago to just do away with our paper registrations for library cards and to enter the information directly into the database. We use the drivers' license information or obviously a piece of mail to verify their residency. But when we after we enter the information including their email address and telephone number, we go back and repeat that information back to the customer verbally to make sure we have everything verified and accurate before we save that patron record. But that has allowed us to not have to file all of these paper registrations, and we do not have to go back and worry about disposing of them later. It's been very helpful. (35:52)

SLIDE 12: PUBLIC LIBRARY RETENTION SCHEDULE

[*Shauna*]

Okay. So, another thing to note about the paper retention schedule and some tips for your paper records. For your resident patron and reciprocal borrower applications, destroy these 3 years after the patron account becomes inactive. But, for your PLAC and your non-resident applications, you want to make sure that you destroy those 3 calendar years and after the receipt of the State Board of Accounts audit report and satisfaction of unsettled charges, because we know that the PLAC and the non-resident applications have funds attached to them. And we want to make sure that we're not destroying those applications before we get all the funds reconciled with the different parties. So that is just a tip for dealing with the different types of patron paper records. (37:00)

SLIDE 13: DIGITAL PATRON RECORDS

So digital patron records, we do have a standards requirement, Indiana Code requirement, and it states, "The library shall purge or mark inactive unused library patron cards at least once every three (3) years, deleting those patrons who have not used the card in the last three (3) years and do not owe materials, fines or fees to the library."

So basically, what we want to do, according to the Code, is delete patron records who have not used the library in the past 3 years and do not have outstanding transactions. Well that's great, because the Evergreen Indiana policy actually is a bit more restrictive than the Code, so that means of course Evergreen Indiana is in compliance with that Code and in addition is a bit more restrictive there. And so we purge inactive library patron card with no outstanding loans, fines or fees on a rolling 12 month basis. (38:10)

SLIDE 14: INACTIVE VS DELETING

So something that we've been working on for a while now is automating this process of marking patrons inactive and deleting them and doing sort of mass deletions so that each individual library does not need to manually delete and mark inactive their library patrons. And I have some really great news for you, Anna Goben, our Evergreen Indiana Coordinator, and Jason Boyer, our Evergreen Sysadmin, have been working on a program to provide this service, autodeleting and marking inactive and making it easier to manage that system. So, beginning on November 1, 2013, the end of this week, patron profiles are going to be automatically marked inactive upon expiration, just automatically by the ILS. So no one will have to worry about that. So, , those patron profiles, again will be marked inactive on expiry.

After that they will remain in the database as inactive patrons and you will still be able to search for them up…until up until 12 months after that inactive status has been activated basically.

So they will be deleted 12 months after that inactive status if the account has no outstanding fees. If the account does have outstanding fees, they will remain in the database so that we have that for historical purposes.

Does anyone have any questions about that? It's a new service that we're providing. We're very excited about it, and we hope that everyone is excited about it as well.

We do have a question, so we'll just pause here. And please go ahead and type into the chat any questions that you might have on anything that we've covered.

Taira Simmons: Will we receive a report of patrons who are being deleted?

So we are actually going to be discussing reports in the next couple of slides. What we recommend is setting up reports, knowing that this program is rolling out on Friday, setting up reports so that you will be able to track what patrons are being deleted when.

Sandra Rowland: Are the patrons deleted on a rolling basis also or just once a year?

Yes, patrons are deleted on a rolling basis. We are discussing the length of time, the final length of time which, you know, they will be deleted on. But we're shooting for daily to make it easier for the system. And Jason is actually doing some testing right now. But it will be on a rolling basis, an on-going basis, rather than annually. (41:35)

SLIDE 15: HELPFUL REPORTS: PART I

Okay, so, we had a question about reports, so let's just jump right into that. We do have some helpful reports to allow you to manage this information. In this shared folders, templates, those of you who are localadmins and have had the administration class, will, this will be a bit familiar to you. Those of you who have not had to deal with that will definitely need to collaborate with your localadmins on this. In the Customer folder there's a report entitled "Expired Patrons by Date Range". Localadmins can set this report on expired patrons at their branch to automatically generate. And then you can also in that form automatically email a staff member. So your localadmin may not be the one to administer and deal with these records, so they may want to include you as the staff member who receives this report. And you can automatically have that emailed to you monthly, so they don't necessarily have to worry about that. Or they don't have to worry about forwarding it on you when it's finished.

You can review the inactive patrons. A Circ1 has permission to pull up these accounts with the home libraries at their branch and then confirm those inactive who need to be. So they can verify that anyone who is marked inactive really should be marked inactive, and they can kind of review those records.

And we recommend that you use this report to set those destruction dates for your patron…excuse me, for your paper records prior to those profiles being deleted. So in other words, you can get a report that will indicate to you who has been deleted and who can be purged from your paper records. (43:44)

SLIDE 16: HELPFUL REPORTS: PART II

Another helpful report in the Customer folder is for your "Inactive Patrons," and the localadmin can set this report again on inactive patrons at their branch to automatically generate. As we talked about in the previous slide, they can set it to email any of the staff members that would need to actually go through and verify that those inactive patrons are really inactive, should be inactive. And we can use this report to plan for the destruction of those paper records as well.

So I encourage you to play with those reports; reach out to your regional coordinators if you have questions about it. Reach out to your Evergreen Indiana coordinator or your Helpdesk if you have any questions about how that's going to look and how you might set up or plan for this autodelete program and how that will affect your paper retention, paper records retention.

So let us know if you have questions, we're happy to field any of those questions. (44:57)

SLIDE 17: EXAMPLE

Okay, so now we get to an example here of a record that you will see, and I'm sure you have seen quite a bit. So, the first thing that we know about this record is that it is expired and inactive, as is shown in that first red box in the top of that screenshot. This is an example of a record that was automatically marked inactive…or, excuse me…it was manually marked inactive. And we know that because if we check that expiration date, that expiration date, the record expired on April 23, 2010. And then if we jump down, we can see it was last updated, or marked inactive, on 10-30-2012. So you're going to see a lot of this because we've got a lot of patron records to deal with and some of those have just, you know, not been, we haven't been able to deal with all of them and mark them all inactive right after they became expired. So if we look below, we can also see that this account does not actually have any outstanding transactions. So this is a good example of a record that in our new system of automatically marking these types of records inactive, would be deleted, would be a candidate for deletion.

So let me ask you this: when will this account be autodeleted in our new program of autodeletion? And what we discussed a couple of slides ago. When will this account be autodeleted? Go ahead and type in the chat box.

Considering in the last slide, we had discussed that that accounts that are marked inactive automatically by the system will automatically be deleted 12 months after their last date of activity.

Awesome! We have some correct answers here. 10-30-2013; you're absolutely correct.

Another question: when may the proper paper records be destroyed with this corresponding electronic record?

Considering the paper retention schedule requires and the Indiana Code requires the deletion of these records or the destruction of these records three years after the last activity of the patron. When might those paper records be destroyed?

Very good! 10-30-2015, very good.

Okay, some other things to consider, and I'll turn it over to Virginia. (48:15)

SLIDE 18: THINGS TO CONSIDER…

[*Virginia*]

Most of you have seen the patron accounts that have an approaching expiration date. You will notice that when you open the patron's account there's a splash screen that opens up where you would normally see the check out tab. That's going to tell you that the account is set to expire within 30 days or less, and you just need to check that expiration date in the left hand column of the patron account to know exactly when it expires. It's also a great reminder that, if you see this, to go ahead and ask the customer if you can just update their account right away and they don't have to wait till the last day to update their account.

At the same time, 30 days prior to the expiration date, the customer should receive an email, sent automatically by the system, to let them know that their account is set to expire within 30 days.

Okay, if you happen to notice that an account has already expired, I won't recommend that you follow my example and say "Oh, you've expired! That's the problem with your account." We're going to say, "It looks like we need to update your account." That sometimes takes a little bit of practice, but I do recommend it. Because sometimes you'll get a funny look when you tell a customer they've expired.

You, hopefully, most of you know, but if you don't, resident cards can be renewed at any Evergreen library now as long as the patron's identification matches what's already listed in the account and the patron's in good standing: they don't owe over the $10 limit or they haven't been barred or any of those exceptions. This is very helpful because I know if you are close to another Evergreen library, you often get customers from that library coming in to use your…to check out your materials, use your services. And they would like to be able to renew that expired account immediately because they must get on the computer or they have to have that book for a school report, so you just need to verify that information and go ahead and renew that account for them. (50:32)

SLIDE 19: QUESTIONS

[*Shauna*]

Just a couple more things to wrap up here. We will be providing your LEUs to you in the next couple of weeks. Anna Goben will be emailing those out. And we will be providing the archived version of this webinar on our website so that the live webinar can access it later on. Feel free to contact any one of us at the State Library or Virginia Hilbert is also a member of our Patron Services Committee. Any of the three of us would love to field any questions on this you might have.

Andrea Fuller: If one of our patrons has died, can we go ahead and delete the account?

[*Anna*]

If the account is in good standing, yes, you can go ahead and delete. But you don't need to. If you want to simply mark it inactive, the system will take care of it from then on. It's simply a question of what works for you. The…once the account is marked inactive, it should no longer pull for your counts for your patron count record if that's what you're concerned about. But otherwise, as I say, the system will autodelete the account after 12 months.

We're available for the next little bit to talk to any questions you may have. If we don't have a lot of questions, we'll go ahead and wrap up early, but we'd be delighted to field any questions you have on anything we've discussed today or anything else related to patron record management that we didn't get a chance to talk about.

One quick question for you: if anybody is hosting multiple people on their…at their site who want their LEUs, please be sure email me—this is Anna—so that we make sure that everyone gets all of their LEUs.

Pam Long: If a patron was already expired but not marked inactive prior to 11/1/13, will it automatically mark them inactive or will we need to go back to do that manually?

The system on the first will be going back and marking everyone that has been expired inactive. So, no, if you've got your old reports, you can set those aside. We will be doing a batch, batch rewrite on all of those accounts so they will all be marked inactive.

You're most welcome. I know there are libraries that have lists and lists and pages and pages, so…we're going to do it all at once!

Alright, well, looks like everybody's just about ready to move onto the next part of their day, so thank you very much again for joining us, and we will see you again next time! (55:55)