

CIRCULATION FORUM MEETING
February 26, 2020
Fremont Area District Library
1:30 P.M.

Minutes

Select a Recorder – Veronica Pitchford

Approve the Agenda – Add Zoom. Motion: Dorothy Johnson (SM) Support: Kathy DeBone (OS). Motion carried.

Approve the Minutes of the December 4, 2019 meeting (attached) – Motion: Lois Beekman (NF) Support: Debbie Polling (ES) Motion carried.

Items

- Lost & Paid items that are returned
 - May be happening at self-checks or payments online. Scenario: patron sees they owe money, pay for item then 2 days later they return the item.
 - Have you noticed an increase like this and if so how are you handling them?
 - Other's haven't notice spike in this
 - May be through self-check only where they can pay
 - How are you handling re-payment?
 - Timeframe varies
 - Give them opportunity to find the item before accepting payment for it
 - Mail check to patron within timeframe otherwise it's theirs.
 - Require patron to bring it to desk for refund
 - Notice more bill notices
- Follow-up on Overdue items before billing (what do other libraries do?)
 - Shelf check and contact patrons to remind them
 - Staff doesn't see many overdue notices. Most go via TNS or Email
 - Many do not go beyond system notification
 - If anyone is interested is running a list, Sheryl can walk you through Create List to generate an overdue contact list

Patrons

- Email notification update
 - Patron's not getting their notice via email was resolved by the III helpdesk in regards to the AT&T domains.
 - There may still be an issue between Zimbra (llc mail server) and AT&T but that is a separate issue from system notices.
 - Running test from Zimbra to patron's email account won't work
 - A test email has to come through the Sierra system
 - Zimbra server and IP address is different from the Innovative/Sierra server and IP address, both are hosted services but not connected to each other.
 - If a patron comes in and checks it out before the email notice is sent, the patron will not receive the notification
 - If email isn't going through with Zimbra, contact tech-help with the account you are sending from and who you are sending it to in order to troubleshoot this issue.
- Patrons adding/editing their own email accounts

- Approved at last ILS meeting
- LLC will change the email notification sign up page to redirect patron to their account to update
- It will not be necessary for patrons to fill out email notification sign up form.
- Most email that gets returned to the server is because the email address was incorrectly entered into the system
- As we move toward Bibliocommons, patrons will be able to create their own Bibliocommons account. If patrons don't have the ability to update their email address, the Sierra email address overwrites the email they have designated in Bibliocommons when they create their account.
- When patrons log into Encore, they can edit pin and edit the account
 - Sheryl set the patron record display to show the current email we have in Sierra. It will only display the top email address in their account if they have more than one in their record. Notices only use the top one. If they need more than one email, you could just put a comma after the first email address and add another email address so it's all in one line.
- Non-resident system configuration changes effective 1/2/2020
 - No longer necessary to add the manual block for Non-resident. We have stopped using this M-Block.
 - You must assign them your library's Local use noresident PType
 - They will be blocked from using these cards at other location by the software
 - Without MBlock they can now take advantage of Automatic Renewals
 - This also enables these patrons to place bib level holds on your local items only
 - Only your copies will fill these holds
 - Some of libraries still had the old PType for systemwide nonresidents
 - Renamed them as Invalid PType so staff doesn't accidentally assign them to this PType
 - We have plenty of room for more PTypes. If you need any new PTypes, get in touch with Sheryl to have them assigned.
- Annual purge of expired patron records
 - This will occur next month (March)
 - 1st round, older than 3 years, expired 2016 and earlier, no money owed, no holds, no items checked out
 - After the first week of March, those records will be deleted.
 - These are inactive cards
 - Patrons can re-register if they need to
- Global fines purge on old charges 2003-2013 (National Library Week)
 - We will purge ALL charges within these dates.
 - These are beyond the statute of limitations
 - Billed, fines owed, manual charges, etc. will be removed.
 - \$1.9 million worth
 - Will occur during National Library Week (April 19-25)
 - This will become a new annual practice
 - To keep current
 - Systemwide policy change was approved by the Advisory Council.
 - After the fines purge, expired accounts 2016 and earlier in this group will also be deleted.
- American Factfinder alternatives for address verification
 - <https://censusreporter.org/>
 - <http://www.neighborhoodscout.com>
 - <https://usgeocoder.com/>
 - <https://tigerweb.geo.census.gov>
 - The census will be discontinuing American Factfinder
 - The links above are substitutes sites that you can use

- Factfinder will be offline March 31, 2020
 - They stopped updating this site last year
- If you find other sites, please feel free to send an email out to everyone

MeLCat/RIDES

- MeLCat policy changes effective February 3, 2020
 - MeLCat items are now checking out for 28 days instead of 21 days to patrons
 - When you send out items, that institutional due date is longer now too
 - Request limit increased from 50 to 70 but we have the 25 item hold limit
 - Super-users, you may see more items on their account in their INN-REACH tab
 - Only items on hold tab count towards our hold 25 limit
 - The checked out items and returns don't count against the 25 holds but they do count towards the MeLCat 70 limit.
 - Time on hold shelf is 10 days for MeLCat items
 - Plug for MeLCat Rides Labels
 - Many items end up in delivery with no RIDES shipping label
 - These end up on Sheryl's desk
 - Many times staff miss the small stickers OR
 - Barcode on the back but the sticker is on the front
 - Mostly on No-Pack library materials
 - These STILL NEED A RIDES SHIPPING LABEL
 - Please remind your staff that ALL MeLCat items require a shipping label
 - KDL MeL materials- use RIDES shipping label to return them
 - KDL materials (not-MeL)- put into delivery, LLC will sort and send to KDL
 - They get checked in at the KDL Service Center before they are returned to the specific branch
 - LLC items returned to KDL- drivers pick up these items every day, our sorters at LLC check these items in, waive the charges, and then they are routed to you
 - It is also OK to place GRPL items (non-MeL) in LLC delivery.

Updates & Reminders

- Sierra 5.1/Encore 5.1 Upgrade (March 2020)
 - Scheduled update for March 18 after 9pm
 - New jar files on March 19
 - When you place a copy specific hold, you will not see "print paging slip" it will say "page for title"
 - This should help to minimize hold shelf clean up lists
 - Encore update on the same day
 - Now that our servers are hosted, LLC staff does not do updates. Updates are performed by III helpdesk staff
- Training Tuesdays – addition of Advanced Circulation class in June and September
 - Advanced Circulation
 - Can register on Lakeland site
 - Limited to 8
 - Sign up even if there is a wait list
 - Sometimes there is cancellations
 - Adv Circ- Linked Patrons, merging patrons, MeLCat reports, Circ Reports, notices, Fines paid, etc. Flyers were sent in delivery this week.
 - These are things we don't get into during the basic Circ class
 - Training classes: Circ, Adv Circ, Reports (create list), Encore, Cataloging classes
 - If you know of things that staff need training on, let Sheryl know and she will create a class for it

- Cataloging
- Serials
- Acquisition
- LLC will continue with Training Tuesdays into the next fiscal year. Sheryl will be planning the October 2020-September 2021 schedule later in the summer.

Agenda Additions

- Remote Meeting-Zoom
 - Feedback
 - Tried it before, it worked OK with Skype but there were limitations. Now we have ZOOM.
 - There were some difficulties with back and forth discussions between on site and off site participants
 - Listeners find it difficult to hear
 - May not see everyone speaking
 - Sheryl repeated responses
 - Most laptops have a microphone and a sound bar enhances
 - Laptop volume adjustment is limited.
 - Zoom Participants may not be able to be heard without additional speaker equipment
 - LLC has a ZOOM license
 - Available to all LLC libraries
 - If you would like to use it, contact Tech-help to use
 - May Circulation Meeting
 - If we offered the Zoom option would you participate more?
 - For libraries that don't normally get to attend the meetings
 - Many present said yes
 - The group suggested that we might need another person to monitor for chat questions and comments
 - Two locations for the meeting?
 - Same meeting with two locations connected by Zoom
 - Attendees thought this might be overkill for this meeting but could be useful for other LLC meetings.
 - LLC Finance committee held their meeting on Zoom without a designated location
 - Just a link to sign in and whole meeting held through Zoom
 - What do you think about that for this Forum?
 - Most would like the option to participate by ZOOM, but prefer to be present (THIS IS THE CONCENSUS of the group in attendance)
 - Zoom is a nice option for Dec and Feb meetings due to potential weather issue
 - The Zoom option will be available for the May meeting
 - Link will be in the email
 - Audio may vary based on room and room size
 - There will be two ways to participate raise hand and activate mic or turn on chat feature
 - On this trial, Carol (LL) will be co-host and monitor comments coming in through chat

Questions:

- Paging list- same book, multiple times
 - If you have the only holdable copy, but there are many patrons asking for it
 - As soon as you fill the first hold, it will remove the rest of them from your paging list
- New Materials timeline – How long to do libraries leave items designated as “new”

- Most are 6 months
- Some are 3-4
- Henika DL no “New”
 - Owning library is the first priority to have a hold filled
 - They decided that after 2 or 3 months their patrons were done with it and the item is just sitting on the shelf, so they decided not to use new so it can fill other holds
- May as well get as many circs as you can
- Pin and Payment Pending
 - Payment Pending
 - Once you open the patron record
 - May have to close and open the record again to collect fines
 - Not a bug, it is how the system works to prevent duplicate payments online
 - Remind staff to close out of checkin screens when they leave the workstation and to close patron records immediately to minimize this occurrence.
 - This fine lock can stay up to 4 hours
 - Happens if you are in an account (like check in or online payment made)
 - Pin
 - Pin doesn't appear to be added to the record when a new patron record is being created.
 - The PIN field doesn't drop into record, looks blank
 - It takes the pin but you can't see it drop in
 - If you SAVE AND CLOSE the record, opening it back up, the PIN field will be there.
 - The pin IS THERE and usable
 - Sheryl will report this to the III helpdesk
- If you get jar file error, report them to tech-help@llcoop.org or call the LLC Helpline (616-559-9111)
 - This occurrence has decreased significantly but there are still machines that have intermittent problems.
 - We will ask if this is always happening on the same machine, how often does it happen, how many tries did it take to log into Sierra, etc.

Next meeting: May 27, 2020 at Leighton Township Library at 1:30 p.m.