

## **Circulation/ILL Advisory Group Minutes**

### **June 14, 2019**

**Attendees:** Barb Majka, McHenry; Stacy Mora, Fremont; Louise Neidorf, Wilmette; Anastasia Rachmaciej Park Ridge; Jeff Ray, Morton Grove; Erin Seeger, Northbrook; Robin Smith, Highland Park

**Also Present:** Mieko Fujiura-Landers, CCS

#### **Increase Patron Notice History Display**

The patron notice history tab in Leap currently displays 3 months of notice history. CCS received request to increase the length of time notice history displayed for in Leap. M. Fujiura-Landers noted that the full notice history is accessible through patron history reports in Simply Reports or through a sql query, which CCS can run. Polaris said there would not be an issue if notice history display is increased. There may be the potential of lag when loading the notice history view in a patron record if they are sent a lot of notices. The group looked at a sample patron record with a large notice history. Any lag seemed minimal. E. Seeger said her library made the suggestion in order to help staff measure dates when determining if patrons are eligible for certain refunds. Other attendees suggested using the Patron Account Transaction History View (the Properties button), which also contains dates. The group agreed that expanding notice history display would still help when troubleshooting notice issues with patrons, and decided to change the threshold from 3 months to 6 months.

**ACTION:** Should the patron notice history display should be increased and, if so, for how long?

**OUTCOME:** The patron notice history display should be increased to 6 months.

#### **Patron Association Guidelines**

The group next looked at patron associations. Polaris allows libraries to associate patrons in order to give them access to pick up each others' holds. Discussion focused on creating associations between two or more patrons from different libraries. A committee member asked what kind of information associations have access to. M. Fujiura-Landers explained that associations cannot access any information from the other person's account on the PAC; the permission only allows one person to check out another person's held item. The hold is then removed from the patron's account and checked out on the association's account. The association then becomes responsible for the item. L. Neidorf suggested taking this to the Circulation Technical Group for a vote, in case libraries who do not use associations would like to provide input. The Advisory Group made the recommendation to allow libraries to create

associations between patrons from two different libraries or between non-CCS reciprocal borrowers and will take the recommendation to the Technical Group.

**ACTION:** Establish guidelines for patron association usage.

**OUTCOME:** The Advisory Group made a recommendation to allow associations between patrons from two different libraries or non-CCS reciprocal borrowers, and will take the recommendation to the July Circulation Technical Group.

### **Notice Text Review**

Per a 2017 Governing Board decision, CCS libraries use a standardized notice text. Now that the current notice text has been in use for over a year, the Advisory Group reviewed the text for reminder, hold, overdue, bill, fine, and expiration reminders. The group approved existing text for reminder, hold, and fine notices. The group considered the overdue notice text from the viewpoints of both fine libraries and fines-free libraries. J. Ray made the point that his library is fines-free for local patrons, but reciprocal borrowers are subject to fines and asked if the notice would be able to distinguish between the two situations? M. Fujiura-Landers said we do not have the ability to distinguish between patron codes. The group agreed that the current text qualifies that items "...*may* be accruing late fees" and that the use of "may" not only provides flexibility to fines-free libraries, but gives patrons agency to return items. For the bill notices, the group considered the use of "failure" ("Your account has been billed for failure to return the following items."), to see if there was a more patron-friendly wording, but decided that the existing text was the most concise way of communicating the situation. Expiration notices was discussed last. Consideration was given to the fact that libraries have different ID requirements for registering for or renewing a card. Wording was added to encourage patrons to contact the library for information. A. Daskalos inquired about a same-day reminder notice, which was an available feature on Symphony. M. Fujiura-Landers will see if there is an option for an additional reminder notice.

**ACTION:** Review and, if needed, propose revisions for existing notice text.

**OUTCOME:** Revisions to Expiration Notice text were suggested. M. Fujiura-Landers will pursue the next steps in terms of translating and implementing.

### **Holds Resource Page**

Advisory Group Members received a link to a draft of the Portal page, "Holds Resource Page," at the beginning of May 2019. CCS has made updates to the draft as members provided feedback. The edits were reviewed. Committee members also reviewed the section on

unfillable requests and tested to see the staff experience versus the patron experience. L. Neidorf suggested adding a small revision to the Fill Now section. The group approved the draft and revisions. M. Fujiura-Landers will make the final updates, post to the Portal, and publicize the page in an upcoming enewsletter.

**ACTION:** Confirm Holds Resource Page draft or provide feedback for final revisions.

**OUTCOME:** Final adjustments were decided on, and the page will be made available to staff.

### **Renewal Block for Estimated Fines**

Estimated fines (for overdue items that have not yet been returned) currently contribute to the second level fine threshold. If this threshold is exceeded, patrons will be blocked from renewing items on the PAC or from auto-renewal. The Advisory Group agreed that it would be more patron-friendly not to include estimated fines when blocking renewals, and that patrons can be confused as to why their items did not renew when they and staff cannot see an apparent reason on the PAC/Polaris. The group's recommendation will go to the Circulation Technical Group for a vote at the July meeting.

**ACTION:** Discuss if estimated fines should contribute towards the second level fine threshold or not and make recommendation for the Circulation Technical Group.

**OUTCOME:** The Circ/ILL Advisory Group recommends not including estimated fines in renewal blocks.

### **Circulation Procedures Manual Draft: CCS Patron Entry Standards**

The Advisory Group began reviewing a draft of the revised Circulation Procedures Manual, starting with the CCS Patron Entry Standards. The group first looked at the entry of preferred vs legal name.

#### Preferred vs Legal Name

The group decided that libraries should decide for themselves if a patron's preferred or legal name should be entered in the patron registration name field, based on what works best for their population/location. Library staff can use email, address, birthdays, and optionally driver's license numbers to detect duplicate patrons. The name to be entered in the name field will be the name that prints on a notice. Libraries can decide if they would like to add a non-blocking note to the patron's record that contains the other name form.

#### Driver's License Entry

The group tested how the database scanned in the new REAL ID driver's licenses versus the older format driver's licenses. While the scanned REAL ID licenses include additional characters beyond the license number, it is still searchable by performing an Exact(\*) (exact truncated) search in the Find Tool. As a result, library staff can choose to either scan in the license or key in the number in the Driver's License Number field. S. Mora suggested that circulation staff who frequently look up licenses can configure the Find Tool to open directly to searching Patron Records -> Basic Search -> Driver's License -> Exact(\*) for their login to streamline the search.

#### Use of Address Line 2/Address Entry

A library staff member brought to attention that, per USPS, all unit/apt/suite/etc. information should be entered in the same line as the street address. The group agreed that data entry should match USPS standards, but recognized that there are no current delivery issues. The question was posed about appearance on notices. Committee members also suggested that including the unit information in Address Line 1 would improve patron searchability. M. Fujiura-Landers will test both. The discussion also led to standardizing other elements of the address field, such as the unit designations (ex/ Apt, Unit, Ste), cardinal directions (N, S, E, W) and road types (ex/ St, Rd, Blvd). The recommendation from the Advisory Group is to enter the patron's street and unit address in Address Line 1 field, and to use the USPS standard abbreviations when entering unit designations, cardinal directions, and road types.

\*\*After the meeting, it was determined that these standardizations should be brought to the Circulation Technical Group meeting for a formal vote.\*\*

#### Entering Phone Extensions

The phone number fields in Polaris only accept a specific format, due to telephony. The fields do not accept extensions. The group noted that it is rare for patrons to provide phone numbers that include extensions. If a patron were to provide an extension, staff can enter the information in the non-blocking notes field.

#### **Loan/Hold Limits Audit**

CCS would like libraries to review current loan/hold settings to identify potential areas for cleanup. M. Fujiura-Landers presented the group with a sample and described the review process. The initial review will only look at overall patron loan/hold limits and a suggested timeframe. The group approved the review process. M. Fujiura-Landers will email the audit to circulation managers a week before July 12<sup>th</sup> and will review the process at the July 12<sup>th</sup> Circulation Technical Group meeting.

## Summary of Next Steps:

Who	What	When
CCS	Expand notice history display in patron record from 3 months to 6 months	June 2019
Circulation Technical Group	Discuss and vote to accept recommendation to allow libraries to create associations between patrons from different libraries	At the July 12, 2019 Technical Group meeting
CCS	Revise Expiration Notice text; evaluate translation needs	Summer 2019
CCS	Make final revisions to Holds Resource Page; provide access info to library staff	June 2019
Circulation Technical Group	Discuss and vote to accept recommendation to not include estimated fines when blocking renewal	At the July 12, 2019 Technical Group meeting
Circulation Technical Group	Discuss and vote to accept patron data entry standards recommendation	At the July 12, 2019 Technical Group meeting
CCS	Create and distribute Patron Loan/Hold Limit audits to Circulation Managers; review at July Circ Tech Group meeting	July 2019