

CSC Minutes

September 28, 2011

Present: Rob Klecker (MOO), Rhonda Evenson (VER), Erica Kersten (PIN), Jeff Kauffeld (MAD), Sarah Bukrey (STO), Phil Hansen (FCH), Wendy Rawson (FCH), Karla Stafford (WAU), Elizabeth Bauer (MID), Margie Navarre-Saaf (MAD), Gerri Hanson (MCF), Pearl Mosier (SUN), Heidi Oliverson (SCLS), Recorder: Michelle Karls (SCLS).

1. Call to Order at 9:30 am.

- a. **Introduction of guests/visitors.** Wendy Rawson and Phil Hansen from the Fitchburg Public Library are attending this meeting.
- b. **Changes/Additions to the Agenda.** Under discussion, we are adding "Middle initial on Hold slips", "Committee make-up," "Stops for Lost Card," and "Circulation of Kindles."
- c. **Requests to address the Committee.** None.

2. Approval of previous meetings minutes.

There was one minor correction under Discussion part d: "MAD has a local policy that patrons can check out no more than 10 DVDs total per day." The minutes were approved by consensus after making this change.

3. Action Items

- a. **Overdue notices: request to change header back to BILL, ILS requested review of body text again.** ILS Committee requested that the CSC re-review the wording. The proposed wording stated that the notice was a bill. Second overdue notices are generated when the items are 26 days overdue; items convert to Lost at 29 days overdue. Emailed notices are delivered the same day they are generated and would likely be delivered before the item status actually converted to Lost. Mailed notices would unlikely be a problem. Discussion. Committee agreed to modify the body text as follows:

You will be billed the replacement costs for the following items if they are not returned. This matter can be resolved by returning the items and paying any overdue fines/fees or by paying the cost of the item(s). You can review your record online at <http://www.linkcat.info/>

**issuedate date_due title barcode price
05/13/2011 06/10/2011 Anansi boys : 39078056388540 28.99**

Thank you for your prompt attention to this matter.

Heidi reported that we could set up two versions of the second overdue notice with the same body text but with different headers, and allow the libraries to choose the version they want to send to the patrons that check out at their libraries. Committee agreed to use the header "Final Notice" on one version and "Bill" on the second version. Once the

ILS approves the final version of the body text, we can offer libraries their choice of notice versions. The **CSC Subcommittee recommends the revised body text for the second overdue notice and recommends providing two version of the notice, so that libraries can choose either “Bill” or “Final Notice” as the header on their notice.** P. Mosier moved. M. Navarre-Saaf seconded. **Vote: motion passed.** The CSC reminds libraries that if they send out two overdue notices, the first overdue notice goes out after the item is due 14 days and the second overdue notice goes out after 26 days. The billing notice, Notice of Unresolved Charges, only goes out to patrons when they owe 50.00 or more in charges. It is only generated based on the patron’s balance.

4. Discussion Items

- a. **Update on using WordPress for Circulation Blog/review guidelines submitted by Committee Members.** PAC would like to see their best practices included on this blog, so it becomes more of a Best Practices blog instead of a Circulation Best Practices blog. Good idea, less places to go to get information. Talked about using Typepad again, especially if SCLS staff could be the administrators. Discussion about how to set up logins and security again; can’t go forward until we decide on the software. Rob will send an email to all three committees detailing where we are in the process and ask for input and suggestions for use guidelines. We will review any responses at the October 26th meeting.
- b. **ILS Committee response to agenda items:**
 - i. **MPL report on testing item limits.** Koha does allow us to limit the number of items checked out by item type by location. Margie will do more testing and confirm that limits set at Madison’s location do not affect the circulation rules at other locations. She will report her findings to the ILS Committee on October 5th.
 - ii. **Patron Library cards/SCLS Patron Registration Guidelines.** Discussion and questions: Since these are SCLS guidelines, can the CSC make suggested changes that really only affect ILS libraries? Some CSC members report that they don’t follow the guidelines as stringently as Madison does. FCH reported that many of the problems that other libraries noticed were basic errors; they are new to the system and their staff are new and they were trying to serve the patrons as best they could. Some of the guidelines really need revising: for example, how can you “send” a barcode with the application to the home library if you only provide pre-printed library cards to your patrons? What do you do if the patron doesn’t want a card from their “home” community library but wants yours? More discussion about system cards, online patron registration and other related issues. The Committee agrees that this really is a larger issue than just the mechanics of registration. The CSC **recommends that this issue go to the Administrative Council for review of SCLS patron registration guidelines and ask for feedback from all SCLS libraries. Specific issues include branding, question of system card, policy specific to ILS libraries,**

and correct application of codes (PSTAT, etc). E. Bauer moved. R. Klecker seconded. Vote: motion passed.

- c. **Review clarifying suggestions for “Items Missing from your Hold Shelf” policy.** Heidi sent out a reminder to libraries that if items are missing from their hold shelf, they should be following procedure. After discussion, the committee re-worked the wording in the current procedure to the following:

Procedure for checking items out to your library's Hold Shelf card.

Item has been checked in at your library and placed on the hold shelf for a patron.

If the patron and staff members are unable to locate the item on the hold shelf follow these steps:

- Check that item out to your library's Hold Shelf card.
- Give the item a 5 month due date (you can choose a shorter due date if you want).
 - Go to the Check Out screen for your library’s Hold Shelf patron account.
 - Use the Specify Due Date widget and select a due date 5 months in the future (or a shorter due date).
 - Check the items or items out to the patron account.
- If the item is checked in it will be removed from your Hold Shelf card.
- If the item is not found, the status of the item will become Lost after 29 days overdue. At that point, your library is considered a patron with a Lost item on its account.
- Contact the owning library and request a shelf check for the item.
- If the item remains unfound, you need to reimburse the owning library for the lost item.
- The payment process to the owning library must be initiated within 30 days of the item converting to Lost in Koha.
- Follow the Lost and Paid (green) form procedure.
- Attach pertinent information to the payment.

The committee approved these changes by consensus . After this meeting, Heidi will email these changes back out to the committee for any grammatical or structural changes.

- d. **Pilot project from Resource Sharing Committee: adding walk-in items to regular bib records.** VER has been testing this with their sorter. It pulls the walk-in items as an exception because there are holds on the bib record but when the item is checked in again from the exceptions bin, it is not trapped for a hold. Items with walk-in item types that are on the same bib record as items without that item types seem to be causing problems with the hold alerts on the pick lists – the barcodes don’t appear on report but sometimes have problems with removing the hold from the pick list and have to set the item to Trace. **As a result of testing and reports from various libraries, the CSC states that none of the libraries represented on the CSC are interested in doing a pilot project.**
- e. **“How overdues work in Koha” document:** Recent bug fixes were tested by libraries and were successful. There is no option to write off a partial amount of a line item but you

can pay part of the amount and then write off the rest. The committee requests that the term “write off” be used though out the document (remove “waived”) and that the document be dated. Heidi will make the requested changes and post it on the Circulation Support page in the Workflows section. She will also send out a link-announce email, report it on the blog and add the information to the Circulation Manual, Fines and Financial transaction section.

- f. Running Holds Queue Reports and Multiple Copy Holds.** Vicki sent out a request for staff to test the Multiple Copy Holds fix and she didn’t get any responses. Heidi asked this committee to have their book club holds person test this by activating multiple holds in the production database without sending the Book Group Holds email to link-circ. Some Committee members said they could set up a test at their libraries. As part of this testing and on-going holds maintenance, all libraries need to be reminded that they should be running their Hold Queue report (pick list) at least once a day and filling as many holds as they can. If a library doesn’t run their Holds Queue report for a couple of days, the holds alerts on the reports get backed up. If you can’t find an item, set it to Trace so the hold alert can move to the next library. The Pass feature for the individual holds should only be used for unique circumstances but no one could think of a reason why you would use it instead of setting the item to Trace. Trace indicates that you have looked for the item and not found it so you want the next library in the sequence to try to fill the hold. The Libraries should only pass the entire report for emergencies and closures. How can we mandate that every library run their Holds Queue report at least once a day when they are open? Should this be a policy? Libraries should not pass everything on the report once they are done working on it or at the end of the day (like they used to reconcile the report in Dynix). Committee members wondered if reducing the number of time the report refreshed (maybe to 2-3 times a day?) would reduce the number of new holds that appear on the report every hour? How would reducing the report affect items that are checked in outside of the report. Heidi will investigate and report back to the committee at the October 26th meeting.
- g. Middle Initial on Holds Slips.** MAD has been putting patron middle initials on their holds slips. They came up with the directions for this, that Heidi emailed out to all libraries, and will share any best practices related to this. There are instances when truncated names on the holds slip are exactly the same as another patron’s even with adding the middle initial. The middle initial field will display more than one character, so you can enter more than one character to differentiate from another patron.
- h. Committee make-up:** Judy Collison from ORE has resigned and ORE has not yet indicated if they want to send a replacement for her. BAR will be sending their new Circulation Supervisor to fill Meg Allan’s seat when that position is filled. Phil Hansen from FCH would like to be added to the committee. Ronda Everson from VER will most likely be replacing Trudy Lorandos on the committee. Michelle will make these changes to the CSC page and add any new people to the committee email list. Heidi and Michelle will confirm that committee members no longer need to be appointed by the ILS Committee.

- i. **Lost card** – When a card is marked lost and is brought into the library to be used, it is blocked at a self check machine. If the patron uses the card at a staff station, the only indicator is a message in red on the Check Out screen that states “Warning: Old Card scanned”. If staff ignores this message, the system will allow checkout using the patron’s active barcode. Discussion about ways to block checkout when that old card is scanned other than relying on staff to notice the warning. Ideally, a block requiring staff intervention would be the best, perhaps an override button like the override button on the Check Out screen.
 - j. **Circulation of Kindles** – This topic came up at the Resource Sharing Committee meeting. A couple of libraries are getting Kindles and circulating them. MID decided to have same titles on all the Kindles, so everyone gets the same experience. Their Kindles are on a Generic record and use the item type Book, walk-in 14 day loan, which does not allow holds. Is there a way to allow the patrons to place holds on these items? If we set up an item type with the “From Home Library” holds policy (patron “home library must equal owning library), patron would be able to place a hold on their library’s Kindle but the patron would still have the ability to change the pickup location when placing the hold. Do not want to provide this option as libraries don’t want the Kindles to move about in delivery. For now, having staff place holds for patron on the Kindles seems to be the best solution. Staff will get a pop-up when placing the hold but they can place the hold anyway.
5. **The next meeting is scheduled for October 26th at SCLS Headquarters.**