

Circulation Services Subcommittee Minutes

March 9, 2021, 9:30 am

Phone/video conference

Action Items:

The CSS recommends creating a 28 day ILL ITYPE.

Present: Zach Ott (BAR), Steev Baker (SUN), Jeff Kauffeld (MAD), Margie Navarre-Saaf (MAD), Emily Harkins (WAU), Kelly Heasty (MCF), Erica Kersten (PIN), Eddie Glade (STP), Tanya Bolchen (FCH), Emily Noffke (MTH)

Absent: Ronda Evenson (VER), Bailey Anderson (STO)

Excused: Jo Clark (REE), Barbara Henderson (MID), Autumn Baumann (POR)

Recorder: Michelle Karls (SCLS)

SCLS Staff Present: Heidi Oliverson, Cindy Weber

1. Call to Order at 9:36 am

- a. Introduction of guests/visitors
 - i. Kathy Wolkoff (MAD) attending today to talk about 4b (new Item Type).
- b. Changes/Additions to the Agenda
 - i. E. Kersten added "Tracking Bibliovation response time form" under Discussion. M. Navarre Saaf added "modify text on notices" under Discussion.
- c. Requests to address the Committee
 - i. None.

2. Approval of previous meeting minutes: February 9, 2021

- a. Motion: The minutes from the February meeting were approved by consensus.
- b. Discussion: none.
- c. Vote: motion carried.

3. Action Items

- a. None.

4. Discussion

- a. RFID tagging guidelines
 - i. Discussion: The CSS approved the edited test for T. Miller's RFID tagging documentation at the March meeting. The documentation will include photos of RFID tag placement as a visual aid for libraries new to tagging. However, WYO does not own certain formats and would appreciate photos from libraries that own and tag these materials: primarily Playaways, video games and mp3 players. Mostly formats that

have different tagging directions than CDs or DVDs. If any of the CSS members could take picture of those owned and tagged formats and send them to T. Miller it would be appreciated. We will post what we have for now and then add pictures as they become available. A web page will also be created on the ILS Support/Circulation webpage similar to the “Barcode” webpage that will provide information, photos and links to the current and new tagging documentation. The documentation will be posted on a RFID web page and hope to have this complete by the end of the month.

- b. Proposal for new ILL item type with 28 day loan period.
 - i. Motion: M. Navarre Saaf recommends creating an additional ILL item type with a loan period of 28 days. T. Bolchen seconded.
 - ii. Discussion: M. Navarre Saaf reviewed the proposal. Madison Public Library [MPL] proposes adding an ILL item type with a 28 day loan period. The rest of the parameters would be the same as the ILL7 and ILL14. When MPL re-started ILL and OLL lending, they made a temporary policy to account for increased transit and quarantine times. They used their EQUIP item type (wildcard) to facilitate this but did not change the replacement price in the individual records they created for lending these materials. As a result, the system used the default replacement price of 25.00 set in the EQUIP item types (applied when an item record has no replacement price) and ILL and OLL patron were only being charged \$25.00 for lost materials, rather than the \$999.00 typically charge for ILL items types. Other ILL items have value listed as \$999 to get the patrons’ attention in hopes they will return the item. Having the 28 day ILL item type would give libraries more flexibility, but every library is not required to use this. H. Oliverson pointed out in that in Bibliovation there is also the option to set up a rule at a single library instead of creating a new item type. Other CSS members felt that this new item type could be useful for them to use as well. How many libraries use ILL 7? Libraries still use for DVDs but many have been using ILL14 and extend the due dates during the pandemic. Heidi will provide the set of parameters for the proposed item type and insert it in the minutes.
 - iii. **Vote: motion carried.**

Code	Description	Loan period	Guidelines for use	Not for loan	Not for hold	Renewable	[Rental] Charge	Replacement price	H
ILL28	ILL, 28 day loan	28	InterLibrary loan item, 28 day.	No	Home LIB	No	\$0.00	\$999.00	

- c. Additional field on LINKcat library registration form: “Preferred Name” [Other name field in Biblioovation]
 - i. Discussion: E. Kersten mentioned the practice that MPL has developed and added to their registration form. M. Navarre Saaf discussed how MPL developed this practice: she attended a session at WLA and she spoke with the speaker afterward. A patron’s “preferred” name is their daily use name and is not always the name on their legal identification. Right now, staff will enter the patron’s legal name in the First name field and place a Circulation Note on the patron’s Check Out screen to indicate their daily use name. MPL found that the best way to present the information is to place the patron’s “daily use” name in the First name field of the patron’s record and then place the legal First name as shown in their identification, in the Other Name field,. This way the patron is identified in the manner they prefer and both names are searchable. This is not a required change in how patron data is entered in the record but provides a way to meet the needs of the patron without compromising the library’s need for legal identification. This can be added to the Circulation manual as an optional data entry practice but should be discussed by all libraries. Does this need to go to ILS for approval? The “daily use” name entry practice can be added to the Circulation manual at any time.
- d. Update on Retaining Messages question
 - i. Discussion: H. Oliverson reported we have the option to automatically delete messages after a certain period of time. This would be for the record of messages (email, text, print) that displays in patron record (Message Queue) and the notices that display in the “Print Messages” table. At the last meeting, the group decided that 120 days (4 months) would be an optimal setting. H. Oliverson will create a document to explain the settings and the impact. She will provide it for discussion at the May 2021 CSS meeting and we can make a formal recommendation that would go to the ILS Committee for review and final approval.
- e. Review changes to Section V Patron Record and Registration
 - i. Discussion: H. Oliverson reviewed the proposed changes she received from subcommittee members. The suggested strike-outs made sense. E. Harkins has suggested adding some screen shots to clarify some directions. J. Kauffeld had a few suggested changes he brought to the meeting. It was decided that this should be reviewed at a separate meeting by a volunteer workgroup. M. Navarre Saaf will schedule an online meeting for April 13 and invite participants. The following members volunteered to be a part of this workgroup: E. Harkins (WAU), E. Kersten (PIN), J. Kauffeld (MAD), K. Heasty (MCF), and E. Glade (STP). H.

Oliversen will accept the current set of submitted changes and re-post the “revised” Word doc into Google so the group can work with a clean document. This group can make additional changes before the next meeting. Full clean-up of the formatting and additional links to other sections will need to wait until the revisions are completed.

- f. Tracking BV response time form
 - i. Discussion: E. Kersten asked if there have there been a lot of submissions. H. Oliversen reported that responses are trickling in. A few issues reported were not related to response time (new problems, known problems). Most of the response time reports are from Circulation staff. There is a pattern for response time with checkouts for patrons with large number of holds or a large number of items checked out. Is there a particular time of day? Unfortunately, no. E. Kersten expressed that the form is too long and staff don’t have time to fill it out. H. Oliversen explained we need all the information listed on the form to determine what the problems are and to provide as much detail as possible to LibLime. These are the questions they ask us when we report response time problems. We are aware it can be tedious, but we are in a data gathering period and will probably be for a short term. Can we make the form auto-fill? No, again because we need all information staff can provide to determine patterns/problems. Can we make it easy to pull up first thing in the morning? Members suggested creating a bookmark and training staff to pull up the form in a tab first thing in the morning to make it easier to remember to report response time problems.
- g. Proposal to Modify text on notices (Margie, MAD)
 - i. Motion: M. Navarre Saaf proposed wording changes to the pre-overdue notices and also proposed a change to the quarantine language on all notices. E. Kersten seconded.
 - ii. Discussion: M. Navarre Saaf shared the proposal with the group. For pre-overdue notices, can we change the wording about fines because a lot of libraries have gone fine free? Yes, committee members were fine with this change. For overdue fines, can we change the language to say some libraries may charge overdue fines? Yes, libraries are ok with this change. MAD reported they are no longer quarantining items. VER is also not quarantining items. As a result, can we strikeout “are” and include “may be” instead? Yes. Can items be separated in notices to make it easier to read? Not at this time. H. Oliversen reported that these wording changes do not need to go to the ILS Committee for approval, so she can go ahead and make these changes. Proposal # 3 was not discussed but once

Delivery and libraries are no longer quarantining materials then that language will be removed from the Overdue notices.

iii. Vote: motion carried.

Proposals for wording changes:

1. Proposal to change Pre-Overdue Notice since so many libraries no longer charge fines:

Otherwise, please return them as soon as possible ~~to avoid overdue fines.~~

~~Overdue fines may apply if items are returned or renewed after their due date. Some libraries may charge overdue fines if items are returned or renewed after their due date.~~ If you have any questions please contact your local library.

2. Proposal to change quarantine wording on notices:

All returned materials **may be** subject to a quarantine period. When those returns are checked in, they will be backdated to the date received at the library. Please allow at least one week for items to be removed from your account.

3. (I'm not sure if this would need to be voted on, but I thought it would be good to be proactive if it does.) Proposal that once SCLS stops quarantining materials (whenever that is), quarantine wording on notices will be removed.

5. Plan for Next meeting: May 11, 2021 at 9:30 am

6. Adjournment at 11:33 am

For more information about the Circulation Services Subcommittee, contact Heidi Oliveresen. *SCLS staff are available to attend cluster meetings to share information and answer questions pertaining to this committee meeting and other departmental projects.*

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