Circulation Services Best Practices Meeting
March 25, 2020, 10 – 11 am

Discussion regarding best practices for online WEB Use Only card registration.
Applying the WEB Use ONLY patron category to an account does not allow (physical) checkouts and does not allow the user to place holds in LINKcat. Patrons can use this type of card to access digital content only – including specific databases at specific libraries. The expiration for this patron for this category defaults to 12 months but libraries can (usually) select a shorter period as needed. You will need a street address in order to enter a valid PSTAT.
These are manual patron registration options – libraries are not allowed to generate online registration forms that access Bibliovation for a real-time duplicate record check.
- MID form
- MCM form
- Emailed request with copy of ID (MCF)
- Phone registration

Discussion: MID been doing this for a while. They provide a form on their website. Supervisors get robo-emails and someone goes in and checks the data received on the form, assigns a library card number and assigns a patron category of WEB Use ONLY. The patron has 30 days to come in to library to verify address with photo id and collect the physical card. Then they change the patron category to Adult, Juvenile, etc. There has not been any staff hardship with this process. It's rare that patrons do not come in to convert their cards. This process has worked very well for staff and patrons. MCM also has a form on their website but no one from that library is in attendance so we don't know what expiration date they set for these cards. MCF – ask patrons to come in whenever when they reopen to show us a copy of photo id to get a regular patron card. Using a Google form and asking for basic information. MAD is working on getting their process into place. They will be setting the expiration date for all of these cards for June 30th and will require the patrons to provide ID to be able to change to a full use card. Otherwise they plan to delete accounts after 3 months. MID said that during this period online registrations are being set to expire 60 days after registration on the website. MAD is in process of trying to set up phone reference service, once this is set up they will take that information over the phone instead of redirecting patrons to the online form. STP just started providing this service today, they have created a web form asking for the same information as MCM, for plus phone number. SCLS discussion about assigning home library and PSTATs to these records. MID has only had a couple of people from outside SCLS try to apply for a card that they should apply within their own library system for access to digital resources. MID has been offering this service for over two years and it's only happened twice. MAD reported that they have had a few requests and they too refer people to their local libraries and systems. Heidi will work on a Best Practice and send it to this group for review. Then we will post the best practice and allow individual libraries to decide how to incorporate this into their own policies and procedures.

Discussion regarding best practices for checking in materials in the library while closed to the public, including trapping holds.
Some libraries have staff working in library and providing limited services to their patrons. They are checking in items and, if trapped for a hold elsewhere, are confirming the hold and placing it in a bin preparatory to delivery start up. This will reduce the need for a second checkin to trap the hold when we are able to send the item in transit.
What are the Pros and Cons of trapping items for holds on checkin during this closed time?

Discussion: This is actually an unnecessary discussion point as a result of Tony Evers order yesterday. Will this impact libraries providing other services? According to information from DPI, libraries should stop providing curb side services, however there is room for interpretation in section 14, maintaining the value of your inventory. Libraries will need to interpret the Executive order for themselves. Is anyone currently or planning on checking in returned materials? STP not checking in any returns, only new items that they have finished processing. They are looking at most or all staff having to stop working in the buildings and/or work from home in the next week. MID sorter is continuing to work and their book drop is open, not very many returns in general. They have stopped processing the materials that have been checked in/sorted by the sorter.   Some libraries have blocked their book drops – BAR, WAU, FCH – and other libraries have also put up signs telling patrons that all due dates have been extended and to retain the items until the library re-opens. They have not experienced patrons leaving items outside the book drop to return them.   Libraries that have open book returns report that returns have slowed to a trickle. HJO asked if the group thought that libraries checking in items and confirming hold for next library patron would cause problems. ILS staff recommended that if staff are checking in return items, and an item is trapped for a hold at another pickup location, staff should click Ignore and set the item aside to be checked in again when libraries start to re-open. MAD pointed out that if libraries do check in items and do trap those items for hold, it is possible that patrons will see holds "in transit" to them and assume that libraries are open again. MID agrees changing the status to "in transit" would possibly confuse patrons. HJO will touch base with the few libraries that we know are providing limited services and see if they plan to continue.

Other questions / concerns?
1. Vicki reported that if libraries are working from home and have a file share in your library, SCLS staff can help you. Coronavirus information on SCLS web site. SCLS Temporary Remote access, just has to be set up on SCLS network. We can't install software, if you're not in partnership program you can arrange for someone else to install them. SCLS can't do anything with patron lap tops. ILS tasks libraries can do from home page. Help Desk portal not accessible but you can send an email.
2. When libraries re-open, how will we handle the huge holds queue reports? We may want to use the "re-opening" process/timeline that we used when libraries re-opened after the Bibliovation migration. CSS members could look at the Bibliovation Migration Events timeline and then we can discuss options at the April meeting. We will add this discussion to the agenda.
3. Checkin of materials should wait 72 hours to wait before handling materials or use safety protocols.

Best Practices for creating WEB Use ONLY patron accounts for temporary use of digital resources.

Request this information from the patrons:
Last and first name (required)
Street address (required)
City, State, Zipcode (required)
Date of birth (optional)
Email address (optional)

Phone number (optional)

Before entering a new patron record into the system, search the database for both name and address to confirm that the patron does not already have a record.
- If they already have a record in our database, they do not need a separate WEB Use ONLY card to access digital materials.

Use your library for the patron's Home Library.
Enter a PSTAT (sort1 field) based on the street address provided.
Assign the WEB Use ONLY patron category:
- The patron category defaults to a 12 month expiration period. You can select a shorter period of time. Tell the patron the expiration date and that they can convert the "digital" card into a full service card after the library re-opens. They will need to provide a photo ID and proof of address.
- This patron category does not allow the patron to place holds in LINKcat or check out physical materials. They will be able to access any SCLS databases, locally (your library) subscribed databases, Overdrive and other digital resources.

If the patron lives outside of SCLS, inform them that they should request access to digital materials through their own library or library system.