

## **CSS special meeting notes**

**June 23, 2020 1:00 pm**

**Phone/video conference**

**Present:** Margie Navarre-Saaf (MAD), Erica Kersten (PIN), Eddie Glade (STP), Barbara Henderson (MID), Autumn Baumann (POR),

**Recorder:** Michelle Karls (SCLS)

**SCLS Staff Present:** Heidi Oliveresen, Cindy Weber, Vicki Teal Lovely

### **Current issues**

Canceling hold from patron side – new problem.

Patrons reported that they were not seeing all of their holds on the hold shelf in their DL dashboard. This was reviewed by LL and ILS Staff and LL reported that this was probably to the continual addition of Closed days in the calendars. A fix was proposed by LL to change the Waiting date field to a future dates so that patrons would see all their holds and, most likely, we would have to continue to extend the Waiting date on a weekly basis. The Waiting dates was extended for holds on the hold shelf for pickup at libraries that had their dues dates extended to July 1 or August 1. However, this caused other problems in the Staff View, including holds that were checked in between 6/15 and 7/1 had a check in date / hold waiting since date of 7/1. C. Weber is working on report for libraries to find which items had been on hold shelf longest. She's going to contact a LL data specialist to see if there is a way to extract that data. MAD has been watching the report for the last week and everything from June 15 and before now has date of July 1. They are starting to have branches contact patrons about old holds. If they have that 1<sup>st</sup> date, they will start calling individuals. Ask Cindy if your library is interested in the same report.

Recent bug report – when staff cancel a hold from the Patron's list of holds, the system is treating that cancellation as a check in but no Hold Found pop-up appears. This is new behavior. A similar, previously reported bug was the same behavior when staff canceled a hold from the BIB record list of holds. That's why the work-around was to cancel holds from the patron's list. It is possible that a fix in one of the recent point releases modified the behavior. The work around is to check the status when cancelling a hold for a patron to confirm if it has been trapped for a hold. STP asked if the item could be manually checked in again and see what the checkin screen displays? Could they checkout of the item to the patron and then check the item in? It keeps it from showing up on the Holds Awaiting Pickup Report. If a hold is cancelled, it should not act like a checkin but appear on Holds Awaiting Pickup lists that would need to be processed every day.

Another recent bug report – When staff click the Ignore button on a Hold Found pop-up, the Check In screen displays the message "Transferred hold ignored" but the item status is not changing to Available at that location (previous actions) and may be put in transit or fill another holds without further indicator messages.

## **Survey to Libraries: status of work at libraries and re-opening plans**

We need to come up with another survey to find out what libraries are currently doing. We want to get a better idea of what current workflows at libraries are like and what they are planning for the near future. Here are some examples of questions we'd like to ask.

- Are you planning on extending Closed days past August 1? Or will you use the "Specify Due date" option at Check out?
- Will you want to extend due dates again for items currently checked out?
- Holds Queue report: are you only filling local holds? Are you filling holds for patrons at other libraries?
- Holds Awaiting pickup report. Are patrons picking up holds? Do you have many holds on the shelf that are pre-closure?
- Checkout:
  - Are you doing curbside checkout?
  - Are you allowing patrons in-library and allowing them to browse your collection and check out materials?
- Returns: are you accepting return materials? How are you managing returns/delivery?

MAD is not extending their dates and will be going back to normal checkout periods beginning in July. H. Oliversen will draft survey and may send it to the group for feedback if there is time.

Most libraries are not caught up on holds queue reports. SUN asked for a week hiatus from receiving holds. LAK also mentioned having issues. Delivery is going very smoothly but maybe we need to slow down for libraries to catch up.

### **Roadblocks-**

POR – not extending close dates. They do not have enough red bins. They are phasing reopening and will be ending curbside. Patrons will need to make appointments to visit the library. On Monday, they are moving to 10 percent capacity.

WAU – is closed through July and extended their due dates to August 1. E. Harkins needs to check with director about adjusting to regular loan periods. They are managing the flow with 3 deliveries/week. Their book drop is open at certain times. She would worry about becoming overwhelmed if delivery resumes to their regular schedule soon.

STP – they are not extending. There is a log jam with phone calls. They are hoping curbside will drop off so they have staff for the desk for their reopening to the public.

MAD – has a large volume of holds on the holds shelf and staff is actively work to get old holds off. They are starting to work on a pilot project plan with PIN and SEQ where patrons can come in to pick up holds without an appointment.