# **Circulation/ILL Advisory Group Minutes**

September 10, 2021

**Attendees:** Jazmin Bravo, Park Ridge; Keri Carroll, Fox River Valley; Jackie Janavicius, Lake Villa; Brandon Marshall, Winnetka-Northfield; Donna Ramirez, Indian Trails; AnnMarie Thomas, Prospect Heights; Laurie White, Ela

**Absent:** Maggie Rodriguez, Round Lake

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

The September 10, 2021 meeting of the Circulation/ILL Advisory Group was called to order at 9:35am. The meeting was held via Zoom.

## Overview of Circulation/ILL Advisory Group

M. Fujiura-Landers reviewed the job description and expectations of Advisory Group members and the Advisory Group meeting schedule for FY21-22. She will email dates for the remaining Circulation and ILL Technical Group meetings to the group.

## Web Reports: Reports with Patron Data

The group discussed potential adjustments to archived reports in Web Reports in order to adhere to better patron data retention practices, either by removing the archive immediately, after a period, or stripping patron data to just the Patron ID. M. Fujiura-Landers clarified that any changes would only impact the Web Reports archive and not data available in Simply Reports. There was also clarification that staff could search for and locate patron records with the Patron ID, and that patron data would remain in full in the current report. The group agreed that there was a need to maintain the archive but would be comfortable stripping down the patron information to just the Patron ID field. M. Fujiura-Landers will take the group’s opinion back to CCS to discuss.

## Revisions to the Circulation Manual: Patron Records

M. Fujiura-Landers presented drafts for two potential new sections of the Circulation Manual. One drafted section addressed uses who owns or rents property in multiple library service areas. The second drafted section addressed staff personal use cards. Several updates were made to the section on users with multiple library cards. Discussion ensued around the practice of staff cards; there was confusion around what agency libraries had regarding staff personal use cards and reciprocal borrowing since there is no centralized policy. The section on staff personal use cards was removed from the motion. M. Fujiura-Landers will check on taking the topic on staff personal use cards to governance for discussion.

A. Thomas (PHK) moved and L. White (EAK) seconded to recommend approval of the drafted segment titled, “Users with Multiple Library Cards.”

Ayes: J. Bravo (PRK), K. Carroll (DUK), J. Janavicius (LVK), B. Marshall (WNK), D. Ramirez (WGK), A. Thomas (PHK), L. White (EAK)  
Nays: None  
Absent: M. Rodriguez (RLK)

The motion passed.

## ILL Library Account Data Standards

The group examined several data entry standards that were pending from the August 2021 ILL Technical Group meeting. The following data entry standard preferences were established:

* Entry of library code in name field: preference was to encase the library code in parentheses. This standard helped to create a visual distinction between the library’s name and the library’s code.
* Entry of library name that exceeds character limit of name field: preference was to include full name but divide the name up between middle name and last name fields in the patron record.
* Entry of address type label: preference was to leave the default value as-is (“home”).

J. Janavicius (LVK) moved and D. Ramirez (WGK) seconded to recommend pending ILL Library data entry standards.

Ayes: J. Bravo (PRK), K. Carroll (DUK), J. Janavicius (LVK), B. Marshall (WNK), D. Ramirez (WGK), A. Thomas (PHK), L. White (EAK)  
Nays: None  
Absent: M. Rodriguez (RLK)

The motion passed.

## Claims Workflows

The group discussed several pending questions related to claims workflows centered around when and how to resolve claims. The first segment centered around how long claims should remain active and be tied to a patron’s record before they are resolved (or, removed from the patron’s record). Libraries, including the libraries represented in the Advisory Group, have differing practices in terms of when they will resolve a claim. After discussion, the group felt it was an appropriate time frame to recommend active claims remain on a patron’s record for a minimum of one month and a maximum of one year before being resolved (or, manually removed) by library staff.

K. Carroll (DUK) moved and A. Thomas (PHK) seconded to recommend a minimum length of time of one month and maximum length of time of one year for claimed items to remain on a patron's record before the owning library removes the item.

Ayes: J. Bravo (PRK), K. Carroll (DUK), J. Janavicius (LVK), B. Marshall (WNK), D. Ramirez (WGK), A. Thomas (PHK), L. White (EAK)  
Nays: None  
Absent: M. Rodriguez (RLK)

The next segment of the discussion was on establishing recommended workflows for resolving claimed items when not holding the patron responsible for replacement costs. The group considered how staff can identify a manually resolved claim using reports and how the possible workflows could impact withdrawing and replacing items. Because of varying practices around withdrawing and replacing items, the group decided not to recommend a standardized workflow to be used by all, but instead recommended a workflow for use by libraries who need guidance on this topic. The group decided on marking the claimed item as lost in the patron’s record and waiving the replacement costs as the recommended workflow, but libraries may use their own preferred method if they choose.

A. Thomas (PHK) moved and J. Bravo (PRK) seconded to make the workflow of marking an item as lost and waiving replacement costs as the recommended workflow when removing a claimed item from a patron’s record when not holding the patron responsible for replacement costs.

Ayes: J. Bravo (PRK), K. Carroll (DUK), J. Janavicius (LVK), B. Marshall (WNK), D. Ramirez (WGK), A. Thomas (PHK), L. White (EAK)  
Nays: None  
Absent: M. Rodriguez (RLK)

The final segment of the claims discussion was to determine a recommended workflow for how to claim an item that has already transitioned into a status of Lost. The group again agreed that if the library has an established practice for managing these types of items, they can follow their local practice; if a library needs guidance, they can then refer to the recommended workflow. The group was in favor of recommending a workflow where, in order to claim a Lost item, staff check in the item, check the item back out to the patron, and mark the item as claimed so that the item will count against the patron’s current and lifetime claims.

K. Carroll (DUK) moved and A. Thomas (PHK) seconded to make the workflow of checking an item in, checking the item back out to the patron, and marking it as claimed as the recommended workflow of how to claim an item that is currently in Lost status

Ayes: J. Bravo (PRK), K. Carroll (DUK), J. Janavicius (LVK), B. Marshall (WNK), D. Ramirez (WGK), A. Thomas (PHK), L. White (EAK)  
Nays: None  
Absent: M. Rodriguez (RLK)

## Lost and Missing Item Record Deletion

The final discussion of the meeting covered items with a circulation status of lost or missing and introduced the possibility of investigating standardized practices for retaining/deleting these types of item records. The group talked about how having or not having access to lost item records would impact staff workflow, particularly with handling patron issues. The group felt it could be tricky to determine a central time frame for deleting lost item records. The decision would need to account for libraries’ return policies and ensure the database retains item records long enough for staff to handle patron questions related to lost items.

The group felt it may be easier to standardize record retention for missing items. “Missing” is a status traditionally applied to on-the-shelf items rather than items attached to a patron, so they are less likely to impact patron interactions. In terms of advancing this discussion, the group recommended consulting with materials services or technical services staff. Committee members also made the point that any standardization will need to account for special situations, like renovations or collection shifting where materials are being moved from their normal locations. A report would also be needed to identify missing item records ahead of deletion.

A. Thomas (PHK) moved and J. Bravo (PRK) seconded to adjourn the meeting. The meeting was adjourned at 11:56 am.

## **Summary of Next Steps**

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| **Who** | **What** | **When** |
| CCS/Advisory Group | Bring recommendation to approve drafted Circulation Manual segment to October Circulation Technical Group meeting. | October 2021 |
| CCS/Advisory Group | Bring recommendation for claimed item recovery timeframes to October Circulation Technical Group meeting for approval. | October 2021 |
| CCS | Revise claimed returned documentation. | October 2021 |
| CCS | Determine if the topic of staff personal use cards should be taken to governance for official policy | Fall 2021 |
| CCS/Advisory Group | Bring recommendation for proposed ILL Library data entry standards to February ILL Technical Group meeting for approval. | February 2022 |