# **Circulation/ILL Advisory Group**

# **Agenda – September 10, 2021**

# **Zoom, 9:30 a.m.**

Meeting Access Information:
URL: <https://us02web.zoom.us/j/84683545612?pwd=NTk0WnhLTnZHdXdINUNYMVhNQUxNQT09>
Meeting ID: 846 8354 5612
Passcode: 842992

## Overview of Circulation/ILL Advisory Group (10 mins)

1. Review advisory group member job description and decision-making matrix.
2. Review meeting dates for FY21-22.

ACTION: Discussion only.

## Web Reports: Reports with Patron Data (15 mins)

* 1. Web Reports URL: <https://reports.ccslib.org/>
	2. Web Reports features a report archive, where staff can access previous versions of regularly generated reports. A number of these reports include patron information, such as names and barcodes.
	3. CCS wants to align to better data retention practices for Web Reports. As a result, CCS needs to either modify or remove the archive for reports that contain patron data. A list of impacted reports can be found in **APPENDIX A**.
	4. Two options CCS is considering include:
		1. Maintaining an archive but stripping out patron data (except for Patron ID).
		2. Removing the archive altogether for reports that contain patron data, either immediately or purge archives after a certain number of days.

ACTION: Discussion only.

## Revisions to the Circulation Manual: Patron Records (15 mins)

* 1. **APPENDIX B** contains a draft of two new segments for possible addition to the Patron Record section of the CCS Circulation Manual. These segments cover users with multiple library cards and the issuing of staff cards.
	2. Review and discuss the draft. If revisions are needed, CCS will make adjustments. If the group approves the draft, the draft will then be taken to the October Circulation Technical Group for final approval into the manual.

ACTION: Motion to recommend approval of drafted segments on “xii. Users with Multiple Library Cards” and “xiii. Staff Library Cards.” Recommendation will be taken to the next Circulation Technical Group meeting for approval.

## ILL Library Account Data Standards (20mins)

1. At the August ILL Technical Group meeting, the group reviewed how to enter patron data for ILL Library Accounts. Current instructions can be found on the Learning Portal at <https://www.learning.ccslib.org/ill-libraries.> Several questions on data standards came up that have not yet been discussed.
2. The following are the pending data entry questions. Please see **APPENDIX C** for more details and examples.
	1. Name entry: should the library code use parentheses?
	2. Name entry: if a public library name is too long to fit in the last name field, how should the name be entered?
	3. Address entry: should staff use a standard address type label for ILL Library accounts?

ACTION: Motion to recommend pending data entry standards. Recommendation will be taken to the next ILL Technical Group meeting for approval.

## Claims Workflows (45 mins)

1. There are several pending questions on Claims from the July Circulation Technical Group meeting. CCS is seeking input from the Circulation/ILL Advisory Group for questions related to claimed items.
2. Claims will remain on a patron’s record (visible to staff; not visible to the patron) until the library resolves the claim. We currently do not have standard practice for when claimed items should be removed from a patron’s record. As a result, some claims are left on patrons’ records for a significant length of time (as of August 24, 2021, 36% of active claims have been in claim status for 2 years or more).
3. What is the maximum length of time a claimed item should remain on a patron's record before the library removes the item? Is there a minimum amount of time a claim should remain before the library removes it from the patron’s record?

ACTION: Motion to recommend a minimum and maximum length of time for claimed items to remain on a patron's record before the owning library removes the item.

1. If not billing the patron for the claim, there are two ways to remove a claimed item from a patron’s record. One way is to mark the item as “Lost” and then waive the charges. The second way is to check the item in off the patron’s record and then mark the item as missing. What is the recommended workflow to remove claimed items from a patron’s record when not holding the patron responsible for the costs?

ACTION: Motion to recommend standardized workflow for removing a claimed item from a patron’s record when not holding patron responsible for cost.

1. Another question that came from the Circulation Technical Group meeting was on the best way to resolve an item that has already been billed to the patron and currently has a status of “Lost,” but the patron claims to have returned. One method is to waive the charge for the Lost item (but forfeit any record of the item being claimed). The other method is to check in the item, check the item back out to the patron, and then mark the item as claimed. What is the recommended workflow to resolve a Lost item that the patron claims to have returned?

ACTION: Motion to recommend standardized workflow for removing a Lost item from a patron’s record that the patron claims to have returned.

## Lost and Missing Item Record Deletion (20 mins)

* 1. CCS is interested in gathering feedback on the possibility of standardizing when Lost and Missing item records are deleted from the database.
	2. Right now, it is up to an individual library as to when they delete item records that have a status of “Lost” or “Missing.” Libraries have varying practices as to when they delete these records. Because practices are not standardized, CCS cannot perform deletions centrally.
	3. CCS is interested in hearing how a standardized practice may impact staff that work with patrons. For example, would having Lost or Missing items deleted within a certain period impact any workflows? Would this impact interactions with patrons?
	4. What information would you need to determine a best practice for how long Lost and Missing items should remain in the database before being withdrawn and deleted?

ACTION: Discussion only.

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##### **APPENDIX A: Web Reports with Patron Information**

|  |  |  |
| --- | --- | --- |
| **Web Reports Category** | **Report Name** | **Run Frequency** |
| Statistics | Monthly Lost and Missing and Bindery (Damaged) | Monthly |
| Statistics | Patrons Added/Removed | Monthly |
| Patron Management | All Patron Records on File *(NIK report only)* | Monthly |
| Patron Management | Daily Clean Hold Shelf | Daily |
| Patron Management | Holds Trapped Previous Day | Daily |
| Patron Management | Item Holds | Weekly |
| Patron Management | Legacy Patron Notes | Weekly |
| Patron Management | Monthly Expired PAC Registrations | Monthly |
| Patron Management | Monthly Patrons 18+ Years of Aged with ParentGuardian Data | Monthly |
| Patron Management | Monthly Patrons Expiration Date Next Month | Monthly |
| Patron Management | Monthly PHK Patrons Registered at WGK *(PHK report only)* | Monthly |
| Patron Management | Monthly WGK Patrons Registered at PHK *(WGK report only)* | Monthly |
| Patron Management | New Registrations with Email *(WGK report only)* | Bi-Weekly |
| Patron Management | Old Holds | Weekly |
| Patron Management | Patron Library/Patron Code/Patron RBP Code/Prefix MisMatch | Daily |
| Patron Management | Patrons with Invalid Phone and/or Email Address | Daily |
| Patron Management | Pick List Processing | Daily |
| Patron Management | Pre-Collections Report | Daily |
| Patron Management | Weekly No Eligible Items for Holds | Weekly |
| Patron Management | Weekly Patrons Added *(NIK report only)* | Weekly |
| Bib and Item Management | Bibs with Holds/No Items Attached | Daily |
| Bib and Item Management | Items with a Status of Claims | Daily |
| Bib and Item Management | Monthly Items 6 Months Past Due | Monthly |
| Financial Reports | Daily Collections Update | Daily |
| Financial Reports | Daily Detail Payment Report | Daily |
| Financial Reports | Monthly Detail Payment Report | Monthly |
| Financial Reports | Monthly Detail Waived Bills Report | Monthly |
| Financial Reports | Monthly Maker Space Fees Charged *(WGK report only)* | Monthly |
| Financial Reports | Weekly Collections Submission | Weekly |
| Extra Special | Auto Patron Merge | One-time |
| Extra Special | Gale Analytics on Demand *(ALK report only)* | Monthly |
| Extra Special | NCOA Reports | One-time |
| Extra Special | Raw Check In Transactions *(NBK, WNK report only)* | Monthly |
| Extra Special | Raw Check Out Transactions *(NBK, WNK report only)* | Monthly |

##### **APPENDIX B: Draft Additions to Circulation Manual**

2. The Patron Record

**xii. Users with Multiple Library Cards**

Staff should refer to [Section 3050.70 Non-Resident Property Owner and Leasee](https://www.ilga.gov/commission/jcar/admincode/023/023030500000700R.html) of the Illinois Administrative Code.

Per this statute, an individual who owns or leases property that is taxed for library service in multiple library service areas may receive a card from each library. This may include the property owner or persons who rent (“lease”) the property. According to the Illinois State Library, there is no prohibition in statute that would deny an individual paying taxes to two or more libraries from receiving a library card from each.

Libraries may issue a separate card to a user with an existing account if that user owns or leases property within the library’s service area. The patron will essentially have two or more home library cards and accounts in the database. Libraries should adhere to local policy for issuing cards (example: local policy may state that non-resident taxpayers may be issued one card per household).

**xiii. Staff Library Cards**

CCS libraries can issue staff personal use cards to users who work at the library. Typically, these personal use staff cards will have a patron code of XXX EXEMPT.

Libraries may dictate the XXX EXEMPT staff cards are to be local-use only. These cards will be blocked if the user tries to check out at a different CCS library. In these cases, staff should use their home library card when participating in reciprocal borrowing. If the staff member works at their home library, the library may opt to issue a staff personal use card (XXX EXEMPT) in addition to the home library card (XXX PATRON) if the staff card allows the staff member added benefits as an employee, such as being exempt from fines.

##### **APPENDIX C: ILL Library Data Entry Standards**

1. **Name entry: should the library code use parentheses?**

Parentheses do not impact searching in Leap. Staff can search “XBR Thornton” or “(XBR) Thornton” and will receive the same results

*Example record with parentheses:*



*Example record without parentheses:*



1. **Name entry: if a public library name is too long to fit in the last name field, how should the name be entered?**

Example: the Brookfield Public Library recently changed their name to Linda Sokol Francis Brookfield Library.

If the name is too long to fit into a single field, I propose that staff divide the name up between the middle name field and the first name field. This mimics the naming convention for university libraries. In the following example, “Linda Francis Sokol” has been entered in the middle name field and “Brookfield Public Library” has been entered in the last name field.

Both middle name and last name are indexed fields both separately and together. This means staff can search for and locate the account by searching “Linda Francis Sokol,” “Brookfield Public Library,” or “Linda Francis Sokol Brookfield Public Library.” Staff can also search a portion of the name and locate the record, as long as the name segment is sequential. For example, searching “Sokol Brookfield” will open this record but searching “Sokol Public Library” will not.

Staff may need to use individual judgment as to the best way to divide up the name when creating or modifying an account.

*Example record:*



1. **Address entry: should staff use a standard address type label for ILL Library accounts?**

The address type label field is found in the patron registration workform, under the Address section. The field defaults to a label of “Home.” This field is not searchable in Leap. It is not available as an output option or filter in Simply Reports.



*Breakdown of address types in use by ILL for CCS records (data as of 8/26/21):*

|  |  |
| --- | --- |
| **Address Type** | **Number of ILL for CCS Accounts**  |
| Home | 4,557 |
| Work | 16 |
| School | 21 |
| Primary | 12 |
| Alternate | 18 |
| Office | 0 |
| Other | 23 |