**Notes**

**CCS Circulation Technical Group**

**Virtual ZOOM Meeting**

**January 14, 2022**

**9:30a – 11:30a**

1. **Call to order**
   1. **9:32am** 2 min
2. **Approval of minutes from October 8, 2021.** 2 min
   1. Maggie Rodriguez RLK / Ann Thomas PHK seconds
3. **Additions to the agenda** 2 min
   1. Anastasia Rachmaciej PRK : New Hold slips including hold/return option below **-** Mieko will (did) check with Rails and send (sent) email
4. **Officer reports** 2 min
   1. Chair - None
   2. Vice Chair - None
   3. Secretary - None
5. **CCS staff reports**
   1. Printing list of checked out items -DEMO (Mieko) 10 min (video @ 4min 30sec)

**PRE DEMO: Reminders, updates**  
Patron updates: adding Blank Last Activity date to patron purges - Thanks Ann @Phk

Check Patron blocks before adding patron: Invalid Address NOCA- confirm and clear

Annual Fee purge – March – more than 7yrs (march 1 2015)

Overdue purge for fine free libraries – will receive info on purged totals

**Lost Item recovery option: OPTIONAL** (video @ 9min :28)

Lost item returned – resolve lost item window appears – OR library can set system to automatically do an action when item is returned based on time in lost status. Request via help ticket. Long discussion and questions on this feature.

**DEMO: Printing List of checked out/in items from LEAP** (video @ 25min)

See slide show sent by Mieko +/or view recording of demo

* 1. Notice Updates (Debra) 10 min (video @ 30min)
     1. Notices: Increase font, only 1 style font, fix wording etc examples shown
     2. February final changes, March implement – date tba - still considering when to go back to shared wording on emails
  2. Claimed items workflow - Updates (Mieko) 10 min (video @ 37min 45sec)
     1. Items removed if not resolved after 1 full year, Executive committee approved first deletion will be January 28, then done last week monthly

1. **Old Business - None**
2. **New Business** 
   1. **Unclaimed Holds** 10 min

Belonging to other libraries that have become missing, lost, or stolen

from the hold shelf. Can we clarify responsibility and the steps to resolution?

(Paula / Zion-Benton) (video @ 41min)

Video 44mins shows CCS rules for Intra CCS loan missing on hold shelf

Discussion depends on RBP or CCS patron, OCLC or Intra CCS item

* 1. **Cards for Kids Act procedure** 10 min (video @ 1hour)

Interested to know if any libraries are using a form of some kind?

(Karen Kee / GVK)

Some using document confirming free lunch program, but no one volunteered any specific form they are using

Specific Statistical Class in list: “Nonresident fee waived – Cards for kids”: yearly

* 1. **New Managers / Staff introduce themselves to the group** 5 min (video @ 1hr 6min)
     1. Meet the new members to our merry band!!!!!
        1. Rachel Kwan new assistant manager at LVK
        2. Shannon new public services supervisor GLK
        3. Jenn new circulation manager NBK
  2. Revisited **Rails new slips** – image of slip. Not required to use
     1. Mieko checking with rails will let us know
  3. Michelle Meyer-Edley DPK: **which status can they change** if it’s another library item
     1. Mieko is going to research and let us know
  4. Stephanie LNK: phone message **odd caller ID**
     1. CCS knows and is working with AT&T to correct (since corrected)

Karen – GLENVIEW going RFID!

1. **Adjournment** Maggie Rodriguez RLK/ Anastasia Rachmaciej PRK
2. **Below email sent from Mieko with follow up items as promised! (Isn’t she a wonder?)**

*I have several items to share with you as follow-up from this month's Circulation Technical Group meeting.*

*1. How-To documentation has been added to the website on* [*printing a list of a patron's out/overdue items*](https://www.ccslib.org/training/printing-list-outoverdue-items-leap) *and* [*printing a list of checked in items*](https://www.ccslib.org/training/printing-list-checked-items-leap) *for a patron in Leap.*

*2. An informational page on the* [*Polaris lost item recovery automation*](https://www.ccslib.org/training/polaris-lost-item-recovery-automation) *is also now available on the website. As a reminder, this functionality is entirely optional.*

*3. During the meeting, we had a question about changing circulation statuses - specifically, which statuses can a staff member apply to any library's item vs which statuses should only be applied by the owning library. Here is a summary to answer:*

*When assisting patrons, libraries may manually change the Circulation Status of any item to Damaged, Lost, or Claimed. Manual changes for other circulation statuses should be performed by the owning library.*

*The following documentation has been updated to include this summary:*

*-Page 25 of the* [*CCS Circulation Manual*](https://ccsliborg.sharepoint.com/:b:/s/CCSTraining/EXVvMWPlS3ZFtA8sPN23QD0B5u0caMUoJ2Placlf3ZtMOg?e=QxVPl4)

*-*[*Modifying an Item Status from the Item Record in Leap*](https://www.ccslib.org/training/modifying-item-status-item-record-leap)

*-*[*Modifying an Item Status from Check In*](https://www.ccslib.org/training/modifying-item-status-check)

*The* [*meeting recording*](https://youtu.be/OPR_nbdhE38) *is available on the CCS YouTube page. Stay tuned for the drafted minutes!*

**Circulation Technical Group: Meeting Sign In**  
**January 14, 2022 !!!!!!!!!!!!!!FULL ATTENDANCE!!!!!!!!!!!!!!!!!!!!!!!!!!!!**

|  |  |
| --- | --- |
| **Library** | **Name(s)** |
| Algonquin | Belinda Husak |
| Cary | Nina Haselhorst |
| Crystal Lake | Mari Swift, Julie Gibson |
| Des Plaines | John Lavalie, Michelle Meyer-Edley, Dana Jenkins |
| Ela | Laurie White, Lori Sollenberger, Karen Brown |
| Evanston | Gabriela Mansera |
| Fox River Valley | Keri Carroll, Sam Bunte |
| Fremont | Karen Bolton |
| Glencoe | Danny Burdett |
| Glenview | Karen Kee |
| Grayslake | Shannon Sheedlo, Ashley Sulinckas |
| Highland Park | Danny Quinlan |
| Huntley | Donna Klehr |
| Indian Trails | Donna Ramirez and Rosa Lloyd |
| Lake Forest | Tori Sergel |
| Lake Villa | Lynn Firman, Rachel Quan |
| Lincolnwood | Stephanie Haugan |
| McHenry | Lisa Horist Barb Majka |
| Morton Grove | Jeffrey Ray |
| Niles-Maine | Athena Crouse |
| Northbrook | Jenn Hovanec |
| Palatine | Jennifer Sobel and Rosalie Scarpelli |
| Park Ridge | Anastasia Rachmaciej |
| Prospect Heights | Ann M. Thomas |
| Round Lake | Maggie Rodriguez |
| Wilmette | Kim Hegelund |
| Winnetka-Northfield | Rebecca Ganellen |
| Zion-Benton | Paula Pavelski |
| CCS | Mieko Fujiura-Landers, Debra Wischmeyer |
| Other |  |

**Next Meeting**

**April 8, 2022**

**Virtual ZOOM Meeting**

All matters on the agenda may be discussed, amended, and acted upon