# **Circulation/ILL Advisory Group Minutes**

March 11, 2022

**Attendees:** Jazmin Bravo (PRK); Keri Carroll (DUK); Jackie Janavicius (LVK); Donna Ramirez (WGK); Maggie Rodriguez (RLK); AnnMarie Thomas (PHK); Laurie White (EAK)

**Also Present:** Patti Buehler (WGK); Mieko Fujiura-Landers (CCS); Stephanie Haugan (LNK); Natalyia Smyrnova (WGK)

The March 11, 2022 meeting of the Circulation/ILL Advisory Group was called to order at 9:31am. The meeting was held via Zoom.

## 1. ILL Request Record Statuses

CCS now has a way to modify out-of-system interlibrary loan request statuses, which were previously locked due to 3rd party integrations CCS libraries do not use. The group reviewed a proposal to change the ILL request status of “Inactive” to “Requested,” in order to match the status of intra-CCS holds. The change would display to both staff in Leap and patrons in the PowePAC. It would also cut out the need for staff to use the ILL request Export button, the only function of which at this point is to update the status of an ILL request record from “Inactive” to “Active.”

The group agreed that changing the ILL request status of “Inactive” to “Requested” would be less confusing for patrons and add clarity to the ILL process. For libraries who currently use the Export button, it would save them a step when placing ILL requests. A committee member clarified that even with the status change, ILL requests and intra-CCS requests would continue to display on separate tabs in Leap.

Since CCS and the User Experience Advisory Group has already performed user testing and vetted the term “Requested” for use with intra-CCS requests, we would not need additional testing before updating the ILL request status.

M. Rodriguez (RLK) moved and A. Thomas (PHK) seconded to change the ILL request status of “Inactive” to “Requested.”

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

The motion passed. M. Fujiura-Landers will coordinate communication on the change with libraries and implement the status change.

## 2. Patron Online Account Management

As of December 2021, a new PowerPAC feature became available that allowed patrons to modify their address via their PAC online account. This feature can be set up to allow patrons to modify their address without any staff verification or only with staff verification. CCS wanted to gauge interest in this feature before formally investigating.

The group was not in favor of investigating this feature. During discussion, committee members pointed out how patrons could update to addresses outside of the library’s service area and the need for staff intervention/physical identification when verifying an address. A committee member pointed out that many libraries are participating in NCOA submissions to verify and identify addresses and that allowing patrons to change their address online may interfere with the submission and review process. Based on discussion, CCS will not investigate this feature.

## 3. ILL Lost item Procedures

CCS does not currently have a set workflow for how to manage lost and paid/waived interlibrary loan items. While lost and paid/waived ILL items occur infrequently (less than 0.5% of ILL checkouts become lost), working with the items can be confusing due to how ILL items and ILL request records are tied together. The proposed lost and paid/waived ILL procedures provide a step-by-step of how to manage the ILL item and ILL request record.

A committee member noted that the default ILL item price applied when an item is received can be lower than the item’s actual cost. This can be an issue if the patron pays online right away. One possible solution is to set the default price higher and then reduce the replacement cost once billed to the patron. Another possible solution would be to add the item’s actual price to the item record when the ILL is received by the library. A question was raised whether there was a way for staff to receive a notification when an ILL item was paid for. While Polaris does not have the ability to issue notifications for paid items, libraries may have their own internal workflow for notifying ILL staff. A committee member pointed out that the Web Report, “Daily Detail Payment Report,” includes item information for fees paid the previous day, including ILL items.

M. Rodriguez (RLK) moved and J. Bravo (PRK) seconded to recommend the drafted ILL lost item procedures.

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

The motion passed. M. Fujiura-Landers will take the recommendation to the next ILL Technical Group meeting for formal approval.

## 4. NCOA Patron Management and Patron Registration Procedures

Starting in 2021, CCS began offering a group submission for Unique’s National Change of Address (NCOA) service. Patrons who have been reviewed by the NCOA service and were reported as having moved to a new address will be bulk updated to have a non-blocking note added and the new address appended to their record. Their old address is retained under a “PrevHome” field. Staff re-registering patrons who moved to a different CCS library service area will encounter these fields. CCS does not currently have references to these NCOA-related fields in current documentation.

Proposed revisions to the “Re-Registering or Updating a Patron” documentation adds steps in for removing the “Invalid Address-NCOA" block, removing the PrevHome address, and removing the related non-blocking note. A committee member asked about how to handle trickier address situations, like users who have P.O. boxes. A suggestion for those types of addresses is to exclude them from the bulk update so the library can manage them manually. Another committee member asked about removing the “Invalid Address-NCOA" block for non-local patrons if the user is not your own but the new home library forgot to remove the block. M. Fujiura-Landers will consider what the best action would be for that situation.

D. Ramirez (WGK) moved and L. White (EAK) seconded to recommend the updated “Re- Registering or Updating a Patron” procedures.

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

The motion passed. M. Fujiura-Landers will take the recommendation to the next Circulation Technical Group meeting for formal approval.

M. Rodriguez (RLK) moved and A. Thomas (PHK) seconded to adjourn the meeting. The meeting was adjourned at 10:24 am.

## **Summary of Next Steps**

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| **Who** | **What** | **When** |
| CCS/Advisory Group | Bring recommendation to approve updated “Re-Registering or Updating a Patron” procedures to Circ Tech Group for approval | April 2022 |
| CCS | Evaluate best practice for removing “Invalid Address-NCOA" block | March/April 2022 |
| CCS | Communicate and implement ILL request record status change of “Inactive” to “Requested” | March/April 2022 |
| CCS/Advisory Group | Bring recommendation to approve lost ILL item procedures to ILL Tech Group for approval | May 2022 |