PRAIRIECAT CIRCULATION COMMITTEE
Draft Minutes
February 26, 2019
1:00 PM
GoTo Training

PRESENT ON GOTO: Alexander (CL), Augsburger (PC), Bahr (FO), Bonny (PC), Butler (WL), Christiansen (MX), Dale (RL), Hutchinson (PC), Jensen (PC), Lien (PC), Sebille (SL), Slanicky (PC), Slazyk (PE), Smith (RO), Sullivan (PC), Thompson (KK), Watson (HC), Zanelli (PC)

ABSENT: (None)

VISITORS: Abernathy-Morris (NL), Calbow (UE), Miller (UE), Posing (MN), Schoess (RP), Zielezinski (NL)

1. **Welcome and introductions**

2. **Approval of Minutes for 10/23/2018** – Smith (RO) made a motion and Butler (WL) seconded to approve the October 23, 2018 minutes as written. Motion passed.

3. **Pending Projects/Updates:**
   a. **Auto-renewal project update** – Lien (PC) updated that she has been testing auto-renewal but there are issues. It is designed to use the courtesy notice, and renew eligible items at the time of that notice (3 days before due date) and then inform the patron on that notice. However, it is complicated and confusing in our large consortium. Getting the wording clear on the notice is one issue. Also, depending on who owns the materials, patrons could get a lot of mixed messages. If not every library wants to participate, that is confusing to patrons who don't always know materials they check out are from different libraries. Also, PrairieCat has been generous with three renewals on many things, but that means patrons could keep materials a long time if they auto-renew. May lower checkout statistics and fine revenue. Can request changes/enhancements to auto-renewal in Idea Lab. Butler (WL) made a motion, Smith (RO) seconded to table this for now and everyone agreed.

   b. **Different hold screens since upgrade** – sent to software engineering at Innovative – libraries supplied screen shots from the last circulation meeting. Innovative acknowledged that it is a problem and sent it to software engineering. Sometimes software engineering will make a fix without saying anything. We will be moving to a new version of Sierra in a few weeks and it may get fixed then.

   c. **Resource Sharing Committee reviewed "new" item timeframe on November 7 and made no changes** – the committee reviewed the 15-week time period for "new" items. The committee decided to leave it at 15 weeks, but libraries are welcome to take their items off "new" sooner. You do not have to use all of the "new" item types. Some libraries only use them for DVDs.

   d. **Holds for non-PrairieCat reciprocal borrowing patrons** – Lien (PC) has holds for non-PrairieCat reciprocal borrowing patrons set up for two libraries to test,

Byron and Peru. Individual libraries can allow non-PrairieCat reciprocal borrowing patrons to place holds, but for local holds only. This option is completely optional for libraries, especially if nearby libraries are offline or standalone. Open a Help Desk ticket if you want to use it.

e. **Fines paid locked screens** – as of a recent Sierra upgrade, the fines paid screen locks when a payment is made. This is a staff and patron education issue, to close the screen as soon as the fine is paid and have patrons close it at home. There were issues for several months with exporting the Fines Paid report, but that has been fixed. The fines architecture was completely rebuilt last August. Dale (RD) had it happen yesterday. She paid the fine and a screen came up that the payment could not be done at this time. If you close the screen and go back in, it works OK. Two users cannot pay fines for the same patron at the same time.

f. **Unique ID** – **eliminating extra digit for duplicates / duplicate checking** – Western and Northern PC libraries use unique IDs a lot, but the Eastern libraries not as much even though it is supposed to be required for public libraries. Libraries like it as a search method when searching new patrons before assigning them a new library card. It is a nice way to search and find duplicates for popular names. Public libraries are required to use unique IDs for library cards. The Northern8 libraries use unique IDs like PrairieCat. There will be some duplicate unique IDs when the data from the Northern 8 libraries are loaded. Currently, PC adds an extra digit for duplicates. We may not need the extra digit because this is a phrase search and searches left to right and truncates. It will bring up all matches if there are extra digits. Do we want to stop using the extra digit when there is a duplicate unique ID? You will get a message that the unique ID is a duplicate and you are prompted if you want to add an extra digit at the end. Innovative cannot add the extra digit when they add the Northern 8 libraries. Dale (RD) stated that if you add a digit to the end of the unique ID, the software does not tell you if it is a duplicate. There could be several patrons with a "2" at the end that are duplicates because the software does not alert you when you enter the unique ID. Landis (PC) said it only works for searching if everyone uses it the same way. Slazcyk (PE) uses it to catch patrons if the name is spelled incorrectly or for Jr. or Sr. Jensen (PC) ran a report during the meeting and reported there are 204 patrons in PrairieCat with duplicate unique IDs. Will table for now.

g. **Hold prioritization by delivery hub** – The Resource Sharing Committee agreed that PrairieCat would reintroduce some hold prioritization. This will be discussed at the upcoming PC member updates in March. Previously, we used to prioritize holds down to the delivery route. Will now prioritize holds by delivery hub (Bolingbrook, Coal Valley, Rockford). It would pick a library in your area so you can get it faster. This change needs to be done when the Northen8 libraries go live around mid-May. If a library in your delivery hub does not own it, the hold will go to any PC library. Is reversible if we do not like it. In the future, it could be further prioritized by delivery route.

h. **Review of circulation manuals** – feedback is welcome from anyone on the committee for the circulation manuals and will be passed on to the training committee.

4. **New topics**
   a. **Scopes for adult and young adult** – this was requested a couple of years ago and was added to the Northern8 migration and Innovative staff are currently working on it. Should go live on the production server in the beginning of April. Can limit searches to only adult or only young adult. It is based on the item level locations. If a library has everything in "stacks", you cannot accurately include the items at those libraries. However, if some libraries have items with a certain level of location code (e.g. Adult Fiction) the bibliographic record will be included in the search result.

   b. **FY20 election** – expiring seats are Alexander, Butler, Smith, Thompson, all eligible to run again – the election will be in May. Four new members are needed and current members can be re-elected. Let Landis (PC) know if you are interested in volunteering. Alexander (CL) will not be running again.

   c. **Other updates or concerns?**

      i. **Overdue notices from other libraries** – Dale (RL) recently received overdue notices sent to their library instead of to the patron. The notices need to be sent directly to the patron, not the patron's home library. The system uses the owning library of the item, regardless of which library the patron belongs to. Sullivan (PC) said that all phone notifications are generic. A computer voice tells them what the items are and does not identify the library. Hold notifications identify the library where the item is being held for pickup. Overdue notices come from the library that owns the item.

      ii. **Limits on borrowing** - Patrons are getting loan limits when the checkout library does not use them. The system uses item location and patron type for limits by format. Geneseo used a limit of six DVDs checked out because two patrons were checking out 99 DVDs. Dale (RL) reported that if another library has a limit of three and your library has 10, it stops the patron at three items. It counts what the patron already has checked out from another library. Patrons at RL are allowed to check out 10 DVDs, but if a patron's home library only allows five, it stops the patron at five. If the patron's home library has a higher limit, the software will not stop the patron at 10 items, but staff stops them at the higher level. If you currently do not use a limit and the software is alerting you that the patron is over their limit, open a Help Desk ticket. RL staff does not look at the patron's record to find out how many items they already have checked out. They look at how many items the patron brings to the circulation desk. It is too much work to keep track of what libraries in the area are doing. You could have a list at your library with the limits at the surrounding libraries if you want. Butler (WL) said if a patron gets five items on hold and the patron can only have three more items, the patron has to choose three and library holds the other two for a week, which persuades the patron to return the items sooner. If your patrons are not limited, you should not get the message. Send examples if the limits are not working correctly at your library.

      iii. **New Lenox items going to other libraries** - NL has asked PrairieCat to limit the number of items that non-PrairieCat reciprocal borrowers can check out to five items. Because of this, all NL item locations are in the D – Misc – item

limiting table. This causes a problem when a NL item goes to another library that also limits miscellaneous items in table D (typically hotspots or videogames). Reddick staff sees the block message frequently, but lets the patron check it out in spite of the alert. Judy will follow up with NL on this issue. The plan is to add a special patron type for NL so the limit can be controlled by circulation rules, not limits by format.

    iv. Patron photos - Landis (PC) asked if anyone was interested in storing photos of their patrons in Sierra? RL keeps signature cards and would consider patron photos.

    v. Patron signatures - Need signature on file that the patron is responsible for lost/damaged materials. Libraries are more interested in storing signatures in Sierra than they are photos.

    vi. New barcodes for existing patrons – the Circulation I manual page seven states that when you assign a new barcode to an existing patron, you copy the old barcode to a note field. Some libraries do this, some do not. This procedure is left over from Sirsi. Sierra uses the record number. You could track how many times a patron replaces their card and can start charging them. Libraries are finding that the patron loses their new library card, finds their old card, which is now no good, and has to buy a new card. The old registration card can show the old barcode numbers. Slanicky (PC) deletes the former barcode.   Keeping track of old patron barcodes could be a local library decision.

    vii. PC Member updates in March - Send suggestions for the March PC member updates to any PC staff member.

5. **Membership update – N8 and Byron Schools** – PC staff are working on the 8 libraries in the Rockford area to join PC to go live for cataloging the week of April 23, then circulation will go live May 21st. You will see their items and bibs loaded in April and patrons loaded in May. Byron Schools are a new union list member and because of some staff turnover, PC staff are working with them to get back on schedule.

6. **FY2019 projects**
   a. **Badging program / skills checklists / strategic plan initiatives** – Augsburger (PC) is working on badging for classes taken in Talent MLS (new software for online training). You will get a certificate when you complete a class, which will be good for 5 years. If you leave one PC library and go to another PC library, you do not need to take the class again unless it has more been more than 5 years. More information to come.

   b. **Customizing brief record display** – this is a possible future enhancement topic.

7. **Next Circulation Committee meeting: April 23, 2019, 1:00 pm, GoTo Training**