

CIRCULATION FORUM MEETING

May 25, 2022

Georgetown Township Public Library

1:30 P.M.

AGENDA

Select a Recorder –

Approve the Agenda

Approve the Minutes of the August 25, 2021 meeting (attached)

Unique Management Presentation – Teri Lynn Bullock

Sierra upgrade to v5.4 update

Batch update of hold pickup dates for emergency closures

INN-Reach Reports – Borrowed now requires password

Items

Damaged items reminders

What are local policies regarding exchange/return policies for damaged items?

Renewing items beyond the usual 2/extending due dates on other libraries materials

Who has a 2nd step on checked in items to verify that the items have been checked in?

Return anywhere

Patrons

Email Notification patron signup

Update on email due slips

Barcode replacement – change barcode to note field (old barcodes needed for Overdrive account mergers)

Capira – expiration dates how to reset the app

How many libraries have Acorn TV subscriptions for patrons?

Digitizing paper library card application forms – anyone doing this?

Does anyone still check the KDL/GRPL patron API?

MelCat/RIDES

Same server requests

Re-request of MeLCat materials

Summer 2022 suspensions began May 20, 2022

Updates & Reminders

Patron Point update

Capira – Volume level holds

Unique Management changes on Sierra side

Delivery reminders

Next meeting: If needed August 24, 2022 location TBD

CIRCULATION FORUM MEETING

August 25, 2021| 1:30 P.M

ZOOM | MEETING NOTES

Select a Recorder – Jen V (HO)

Approve the Agenda – Motion from Shanni (ICL), Second by Veronica (Flat River), pass

Approve the Minutes of the August 26, 2020 meeting (attached) – Motion from Leann (OZ),
Second by Shanni (ICL), pass

Sierra upgrade to v5.3 – Changes and new features

- New Manage Holds options (very exciting)
 - View Outstanding Holds has been completely redesigned
 - Used to compile overnight
 - Is now live updated
 - If all libraries could check their Manage Holds a couple of times a month, then Sheryl wouldn't have to send clean up reports
 - Now called Manage Holds in Functions drop-down in Sierra
 - Can go back as far as the oldest hold in the system (currently 2019) through today
 - Can only view Frozen/Inactive holds or exclude them from the list
 - Eligible for paging means that there is something on the shelf
 - Sierra defaults to cycling through the list twice and then is stumped
 - Location Served should default to your library
 - Pickup location you probably want to choose All to see all holds requested
 - Item Location should be set to your library
 - There is an Edit Bib option, but Sheryl recommends avoiding this currently
 - If your login doesn't have edit permissions, it will only allow you to view
 - Can also view what should be on your current holdshelf
 - This time, set Pick Up Location to your library and Item Location to All
 - If this process ever locks up your Sierra session, send a message to tech-help@llcoop.org
 - It is known that there is a possibility of a problem for libraries with very large lists
 - There is a hot-fix that exists, but Sheryl would prefer to wait and see if anyone has issues
 - Any list created can also be exported as a CSV file
 - Sheryl isn't sure how useful that is, but it exists
 - Shanni in Ionia says it's a very useful tool and they've only just started investigating it
- Some of the prompts that were overly repetitive have been fixed and reduced
 - Mostly for sending notices
- Now can resend notices to a different printer in case you are having issues with your default printer
- Fix to Patron Record Template not showing the PIN after being entered

DRAFT

- If you notice any new issues, please email a very detailed description of what you were doing leading up to the issue to tech-help@llcoop.org
 - Screen shots help, but the details leading up to the problem is even more helpful
 - Tech Help really needs to be able to recreate the issue to send it in
 - Please always send it to tech-help@llcoop.org, not Sheryl or Thom directly, this adds it to their ticket system

Items

- Pink slips and Custom Transit slips
 - If you have the correct type of receipt printers, Sheryl very much recommends using the custom transit slips available to you
 - If you need to set up custom transit slips, let tech-help@llcoop.org know
 - Pink slips are still acceptable, but please write clearly where the item is headed
- Delivery procedures, bag packing, etc.
 - It would help the delivery sorters immensely if bags could be packed face down and transit slips facing the back so that the delivery dots show or the transit slip shows
 - Please keep the bag ties to a simple, easily opened tie
 - Kudos to the delivery team from the libraries and Sheryl
- Damaged items procedures
 - Damaged procedure for items belonging to other libraries is to put a green slip in the damaged item and don't check it in
 - This prevents the previous patron from being overwritten
 - Some libraries have automatic RFID check in, this may be an issue for them, including Spring Lake
 - Also, have had issues with libraries not addressing issues in a timely manner, causing issues for the patron not at fault
 - Sometimes going to billing, potentially to Collections
 - Some items are being marked as damaged but not being checking in
 - As an alternative, notate the current and previous patrons are on the green slip and then check the item in before sending it back to the owing library
 - Some libraries place sticky notes in damaged items before checking them out to the patron
 - This does not allow the owning library to question the previous patron
 - Please get to your damaged items in a timely manner and if you need any sort of refresher, please let Sheryl know
 - From Shanni in Ionia: I think if you get an item that is damaged to the point where there will be a charge, cancel that hold and return the item with a green slip. Then place a different item on hold. If we get a circulate-able item with normal wear and tear, we just put a sticky note in the book and let the patron check the item out, we then check in that item when returned and place a green slip in for delivery.
- Items In-Transit too long, what do we do when the other library has already checked their shelves
 - Can change the items to Lost Transit or Missing

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- As a reminder, there is no progression of statuses that happens automatically
- Sheryl has it set up with some libraries that if an item is listed as missing, she will change it to withdrawn, but that is not everyone

Patrons

- Non-Resident Policy updates
 - Policy used to say must have Lakeland universal 20000 prefix
 - Now libraries can their own barcodes on the pink non-resident card
 - Must still use the pink non-resident cards
 - Barcodes can be ordered through Lakeland barcode orders
 - This allows libraries to choose what is available to their non-resident patrons
 - Sometimes only physical items, sometimes allowed to access eresources
 - Still local use only, the card is only good at the library it was purchased at
 - KDL has agreed to issue cards of a different color to the half of a township that they issue non-resident cards in Newaygo County.
 - Will have KDL barcodes
- Overdue and Billing notices
 - Reminder: Monday through Friday the system sends notices early in the morning
 - This helps to consolidate the notices for patrons so that they only get one phone call or email
 - Individual libraries can choose to send notices on Saturdays and Sundays
 - Individual libraries are also responsible for checking their print overdues and billing notices on a regular basis, Lakeland does not automatically send those
- Fines Paid reports (what is BFINES?)
 - This is fines payed through BiblioCommons
 - Replaces eCommerce, eventually
- Annual Patron and Fines purge
 - Sheryl did this week
 - Purged \$194,000 of fines from 2014
 - Deleted 12,000 patrons that owed no fines, 7,900 patrons after their fines were purged with expiration dates from 2017 or earlier
 - Normally done in March or April, look for that next year
 - Lists have been emailed to all libraries
- Emailing checkout receipts to patrons option
 - Part of the November Sierra update
 - If you would like to set this up, let Sheryl know at tech-help@llcoop.org
 - This can be set up by login in Sierra, can automatically ask if the patron wants an emailed receipt or just automatically send the receipt
 - If the patron does not have an email on file, it will ask to add it
 - This may help you save on printer paper while offering a convenience to your patron
 - Does not apply to self-checks

MeLCat/RIDES

- Shipping labels
 - When sending a MeLCat item, **always** print a new shipping label, even if it is a No Pack library
- Check Out to Remote Site mode

- Always remember to check your items out to MeL before sending it so that the status changes to In-Transit
 - Otherwise the borrowing library will be unable to check it out to their patron and will only be able to send it back to you
 - The item status also reverts back to On Shelf even though it is in-transit
- If you attempt to check out an item and Sierra informs you that it is a Lakeland hold, Sierra is actually converting that hold to a Lakeland hold and you do not have to follow the rest of MeLCat procedure, you can just treat it as a regular Lakeland hold, **but only after** attempting to check it out to MeL first
- If libraries would like to switch to using stickers for labels, Sheryl and Jen from HO recommend the following:
 - Avery 6460 Removable 1 x 2 5/8 labels
 - Demco Multi-Purpose Laser Removable 1 x 2 5/8 labels (12218480)

Updates & Reminders

- Fines Suspension ends August 31, 2021
 - Will take place after close that day for those libraries it effects
 - Herrick is not going completely fines free, but have elected to not charge fines for the rest of the year
- Fines Free libraries update
 - These will be all set if you've submitted your paperwork to Sheryl
 - Sheryl has a cheat sheet from OZ that she will send out after the meeting
- Holds back to 25 from 50
 - That hasn't been discussed yet, will have to go to the Advisory Council
- Barcode/Delivery dot orders
 - There is one now, then there will be one more barcode order this year (September)
 - Starting next year, Lakeland will offer ordering only twice a year instead of quarterly (this December and then June)
- Encore
 - Please encourage your patrons to switch fully to BiblioCommons
 - The Encore subscription expires in January and then will no longer be available at all
 - Upgrades may continue until the subscription expires
- Capira
 - Thom and Sheryl are working on getting reports
 - Will get a report for January to June as well as a July and August report
 - If you have new resources that you want to be visible and accessible through Capira, email tech-help@llcoop.org
 - Same goes if you discontinue a service
- Bibliocore
 - Seviles can be added to BiblioCommons, email tech-help@llcoop.org
 - Some libraries are having issues how to explain to patrons how to go from an individual library's catalog to the full LLC catalog
 - Herrick has created this video for patrons:
<https://www.youtube.com/watch?v=2TWvDM4rhbg>
 - Basically, you have to use the Search other libraries link on the top right side to carry your search over

- Sheryl will look into this and see if there are any options to make this more visible
- Patron Point (online patron registration/renewal)
 - Has been incorporated into the Lakeland budget starting October 1st
 - Will be a form that patron can filled out and once submitted, the patron will get a real barcode from the appropriate library
 - Does address verification for adults
 - Automatically set up to tell the patron what their service area is and provide the correct barcode
 - Rising adult notification to minors about when to come in and get an adult card
 - Uses the National Verification Database to compare name and address to automatically renew cards
 - Barcodes issued will not match physical card barcodes
 - Can libraries opt out of messages from Patron Point? Sheryl not sure why you would want to, will be unique to each library, will use logos and such
 - No policies have been decided yet, this is just to let us know that it is coming
 - May eventually switch our regular notices over to this service as well, such as billing
 - Board approved at their last meeting, approved the budget
 - More information will be sent out as it comes available

General Questions

- To mark an item as withdrawn, change the STATUS to Withdrawn to let Sheryl know to remove it and change ICODE2 to W to suppress it from the online catalog
- Creating a ticket for Lakeland by emailing tech-help@lcoop.org is the best way to get any kind of help

Next meeting: December 1, 2021 | Zoom link from Sheryl

- Many libraries request using Zoom, especially for the winter driving

Attendees:

Sheryl: Welcome everyone -- we'll begin shortly in the meantime if you could put your library name in the chat that would be helpful

Leann from Howard Miller

Rhonda Burns from Leighton Township Library

Ben & Rhonda -- Hackley Public Library

Pam Osborn - White Lake Community Library

Rachel Koehne, Spring Lake DL

Kayla from Coopersville

Mary - Newaygo Library

Andrew from Muskegon Area District Library.

Bethany from Henika District Library

David Edelman, Hastings

Newaygo Area District Library - Director Kelly Tinkham

Carol Dawe, Lakeland Coop. Director, Lakeland.

Laura Parks--Cedar Springs Library

Mary Cook from Allendale

Leslie Garrison from Georgetown Township

DRAFT

Wanda from Salem
Erik Parsons - Herrick District Library
Cheryl Smith, Timothy C Hauenstein Reynolds Township Library
Deanna Riggleman and Pam Feutz from Tamarack District Library
Lindsey Kult from Howard Miller
Jonelle, Home Twp Library
Kerry FitzGerald from Loutit District Library
Dwayne Betcher Herrick
Shanni Kerr Ionia Community Library
Cindy Johnson Grant Library and White Cloud Library
Karen Ginman HDL
Rachel Door HDL