

## CIRCULATION FORUM MEETING

May 25, 2022

Georgetown Township Public Library

1:30 P.M.

### MINUTES

Select a Recorder – Jen Vredevelde (HDL)

There were 29 people in attendance.

Approve the Agenda - Motion by Rachel Koehne, Spring Lake, second by Veronica Pitchford, Flat River, motion passed

Approve the Minutes of the August 25, 2021 meeting (attached) – motion by Lindsey Kult, Howard Miller, second by Pam Osborne White Lake, passed

Hello and Welcomes to new staff at libraries and Lakeland

Unique Management Presentation - Teri Lynn Bullock

- Lakeland has been with Unique since 1999
- Unique provides material recovery services, regular notices, SMS notices, live chat services for websites, live talk phone center, temporary or long term
- Service over 1900 libraries throughout US, Canada, New Zealand, Australia
- 68 days overdue, then goes to Unique
  - Will start getting acknowledgement emails from Unique which allows 24 hours to remove any account to prevent them from going the process, also avoids invoicing from Unique
- Unique does not get title information for patron privacy
- \$9.85 service fee from Unique
- Runs accounts through the national change of address database with the USPS initially and again 90 days in to the process
- Around the 7<sup>th</sup> of each month should get email that reports are ready
  - Change of address report available
  - Bankruptcy scrub report
    - Patrons are not contact by Unique while they are in bankruptcy
    - Libraries are not charged for patrons in bankruptcy because Unique cannot process those patrons
    - Libraries will need to manually remove the collections fee from those patron's accounts
- First letter/email from Unique is a 'safe harbor' letter
  - Required letter, provides an opportunity to dispute the account
  - Unique notifies libraries of the dispute
  - Libraries must respond within 30 days with two screenshots showing the patron information edit page and the items in question
  - If libraries do not respond within 30 days, the patron wins the dispute and

Unique must close their account

- Patron allows the sharing of their account information when they send in the dispute
- Unique does not call on Sundays, only between 9 and 9 on weekdays and 9 and 3 on Saturdays
- Unique directs all calls to the library in question
- If a patron returns their missing items but doesn't pay off the collection fee, they will get one last letter/email reminding them of that balance
- Unique does not get notified if we update a patron's information in Sierra, your person with access to the Unique system needs to log in and update the system
  - Can also update for preferred names
- Libraries can suspend accounts in Unique if working with the patron on a payment plan for a specified period of time that has been explained to the patron
  - Unique will pause their timeline of contacts for the period of the suspension
- Libraries can access paid in full letters from Unique if patrons request it
- A patron must have at least one item at billing (63 days overdue) and owe over \$80 to qualify for collections
- Juvenile account letters/emails/phone calls go to their parent/guardian
- As a reminder, anything that goes to Unique from the library cannot be credit reported as of 2016
  - Unique has found that this hasn't impacted libraries very much
  - Unique recommend being the good guy if people ask and be very clear that Unique does not credit report on behalf of the library
- If you know an address is bad before it goes to Unique, change the zip code to 99999, but leave the rest there, this will jumpstart the skip trace process
- All reports go to the patron's home library, not to the library that owns the materials
  - Only exceptions are KDL or GRPL situations
- Email Teri Lynn any questions or issues at [tbullock@uniquelibrary.com](mailto:tbullock@uniquelibrary.com)

Sierra upgrade to v5.4 update

- Batch update of hold pickup dates for emergency closures
  - Similar to advancing due dates on checked out materials
  - Please notify Sheryl via the emergency closure form if you need her to do this
    - <https://llcoop.org/library-closure-form/>
- INN-Reach Reports – Borrowed Report now requires password

Items

- Damaged items reminders
  - Procedure: do not check the item in, put a green slip in the book, include a

note about what the damage is

- We do this so we have access to the previous patron's info
- These are a priority issue so that we can get it off patron's records before getting to the billing stage
- As a side note, if you damage note your items, please be specific as to the damage so other libraries know what they are looking for and can notice new damage
- If you have automated check in, do not check the book back out as that will not bring back the previous patron's info
- What are local policies regarding exchange/return policies for damaged items?
  - Hackley allows replacing in some situations
  - Some libraries require same (hardcover/paperback) for exchange
  - Leighton will work with patrons
  - Herrick prefers the patron call us to work out the best deal for the patron
  - Howard Miller works with patrons and accepts replacements on a case-by-case basis
  - Many libraries choose to include their actual purchase price on item records to help them work with patrons
  - Some libraries put their actual cost as the price in the record
- Renewing items beyond the usual 2/extending due dates on other libraries materials
  - Please respect your fellow libraries and do not override the system and renew items belonging to other libraries
  - This seems to mostly be happening for staff members' personal benefits. This is not okay. Lakeland will crackdown on this if necessary.
- Who has a second step on checked in items to verify that the items have been checked in?
  - Many libraries do double check in
  - Herrick has a magic wand that checks RFID
  - Some libraries barcode check in first and RFID second
  - This is in response to check in not seeming to fully work
  - Sierra can beep if you have speakers on your computer, in addition to the scanner beep
    - Similar to the self-check sounds
    - Sheryl can turn this on for you
  - Lakeland will look into the possibility of group purchasing tools to help with this issue
- Return anywhere
  - Patrons can return any Lakeland item to and Lakeland library – this includes GRPL and KDL items

- If the KDL and GRPL items come through MeL, they need to go back through MeL
- This also means that patrons can return MeL items to any library as well and those libraries should just check them in and send them back to the owning library
- Best practice is if you are unsure, try to check the item in – most often, it will check in
- Reminder, you can add GRPL and KDL cards to Sierra for patrons to be able to use them in Sierra – ask Sheryl for codes if needed (64, 94) consult registration guidelines here: [https://llcoop.org/wp-content/uploads/2021/08/ils\\_patron\\_registration\\_2020-01.pdf](https://llcoop.org/wp-content/uploads/2021/08/ils_patron_registration_2020-01.pdf)

## Patrons

- Email Notification patron signup
  - Patrons can sign up for emails through BiblioCommons, so there is no Lakeland form
  - When they sign up, it will ask and they can go back in later anytime to do this
  - Direct link to email change:
    - <https://herrickdl.bibliocommons.com/account/email>
      - (substitute your own library specific BiblioCommons)
        - <https://dorr.bibliocommons.com/account/email>
        - <https://grant.bibliocommons.com/account/email>
      - Howard Miller has directions for their patrons
        - <https://www.cityofzeeland.com/Faq.aspx?QID=148>
  - Lakeland requests that we attempt to steer patrons towards this email option over phone calls
  - Contact [tech-help@llcoop.org](mailto:tech-help@llcoop.org) if you would like to add email to your new patron record template for Sierra
  - If patrons want to still receive phone calls while having an email on file
    - Notice Preference field put P

-15-2015 Revisions: 4973

HOME LIBR	ho Herrick Main Library	CUR ITEM D	0
PMESSAGE	- NO MESSAGE	PCODE4	370 INSTITUTION
MBLOCK	- -	PAT AGENCY	5 Herrick District Library
CL RTRND	0	CIRCACTIVE	05-20-2022
MONEY OWED	\$0.00	Notice Preference	- NONE
CUR ITEMA	0	Total Registrations	0
CUR IT		Total Programs Attended	0
ILL RE		Waitlists on Record	0
CUR IT			

Select

EMAIL z

NONE -

PHONE p

PRINT a

OK Cancel

- Still keep the email in the z field
- Update on email due slips
  - Sent from Sierra, technically works, but works oddly, still reviewing
  - Sheryl can, by login, default to no print slip – open a ticket with [tech-help@llcoop.org](mailto:tech-help@llcoop.org) for this
- Barcode replacement -- change barcode to note field (old barcodes needed for Overdrive account mergers)
  - Please be sure that when you replace a patron's barcode, add the new one in a new field and make the old barcode a note
 

x	21309001854975 ISSUED IN ERROR 11-8-04 HO/JS
x	21376000246248 LOST CARD 1/19/12 KH/OZ
x	21376000370626 NAME CHANGE/ ADDRESS CHANGE. 10-13-15 HO/AD
x	Tue Apr 11 2017: Claimed returned .i2551273 on Unknown Date
x	21376000423474 LOST CARD. 3-14-18 HO/AD
b	21376000444850
- Capira --- expiration dates how to reset the app
  - The patron will need to reset the app by taping the two arrows going in a circle on the Welcome bar at the top of the main page – this will cause the app to require them to sign in again.



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- Sheryl will get libraries patron counts for Capira usage
- How many libraries have Acorn TV subscriptions for patrons?
  - No one currently
  - Spring Lake and Herrick looking into it
- Digitizing paper library card application forms - anyone doing this?
  - Hackley is waiting for Patron Point, looking at digital signatures
  - Herrick scans all registrations in to digital storage and disposes of paper forms
  - Lakeland will look deeper into options and collate information
- Does anyone still check the KDL/GRPL patron API?
  - A few does, the link is on the [Lakeland website](https://lcoop.org/ils-information/) now
    - <https://lcoop.org/ils-information/>
    - Username: llc
    - Password: 34times
  - This link allows you to check and see if a patron is active in the KDL or GRPL system, also allows you to check if they have fines in those systems

MelCat/RIDES

- Same server requests

- If you have a MeL request for Lakeland pickup, Sierra automatically converts it into a Lakeland hold **after** you use the INN Reach Check Out to Remote Site – Check out in INNReach checkout and send it on as a Lakeland hold
- Please do not perform the rest of MeL procedures for a converted hold, no need for a sticker, no need to send through MeL/RIDES
- Re-request of MeLCat materials
  - If a patron asks about materials that say re-requested, best practice is to cancel and replace the request
- Summer 2022 suspensions began May 20, 2022
  - Many are schools
  - If you have materials that need to go back to a suspended library, you must hold onto those materials until the library reopens in September
- MeL clearing transactions prior to January 1, 2021 on July 1, 2022
  - Make sure anything on a too long or overdue report is taken care of before July 1

#### Updates & Reminders

- Patron Point update
  - Barcode ranges are in
  - Each library need their own GIS file, which took time
  - Non-address verification jobs may be up and running shortly
    - Email reminder for patrons who have turned 18 to come in and update to adults
    - Emails for renewals can now be automated through Patron Point
- Capira - Volume level holds
  - This is still an issue, it is being worked on
    - Initial fix should be within the next couple of releases, then Capira needs to be recoded
  - Capira appears to place the item specific hold, but it does not
- Unique Management changes on Sierra side
  - New account submissions from \$40 to \$80
  - Account information being sent to Unique via secure drop instead of email
  - Collection fee up from \$8.95 to \$9.85
- Delivery reminders
  - Please pack items in the bag upside down so that they green dots are showing on top, pink slips facing back to match
  - Please make sure to attach transit delivery shipping label on to all MeL
  - When working with pink slips, magic markers bleed through and means that the slips cannot be reused, please use a different marker

- If you receipt printers, open a ticket to get setup with custom transit slips to use instead of pink slips
- Please check the green delivery bags for unsuccessful TNS notices, they are not being emailed
- Training materials available at [support.iii.com](https://support.iii.com) from Sierra
  - Lakeland will look in ongoing training after Patron Point

Meeting adjourned at 4:15 pm

Next meeting: If needed August 24, 2022 location TBD