

Patron Services Committee

18 June 2013

Greenwood Public Library, 10.00 a.m.

Voting Members Present:

Laura Hull, Peabody Public Library
Vanessa Martin, Greensburg-Decatur County Public Library
Brandy Graves, Shelby County Public Library
Walter Warren, Vermillion County Public Library
Virginia Hilbert, Hussey-Mayfield Memorial Public Library
Virginia Jensen, Mooresville Public Library
Jennifer McKinley, Morgan County Public Library
Laura Jones, Culver-Union Township Public Library
Judi Terpening, Switzerland Public Library [via teleconference]
Shawn Heaton, Alexandria-Monroe Public Library

Voting Members Absent:

Karen Jewel, Greenwood Public Library
Sandy Rowland, Westfield Washington Public Library
Jamie Tyner, Linton Public Library

Non-Voting Members Present:

Shauna Borger, Indiana State Library
Anna Goben, Indiana State Library
Bill Anderson, Indiana State Library
Carly Schull, Westfield Washington Public Library
Christina Hime, Jackson County Public Library

- I. **Call Meeting to Order** 10.00 a.m.
- II. **Approval of Agenda** (Heaton / Hilbert)
- III. **Approval of the Minutes from 19 March 2013** (Hull / Graves)
- IV. **Indiana State Library Reports** (Shauna Borger and Anna Goben)
 - a. Welcome to Anna Goben, our new Evergreen Indiana Coordinator.
 - b. Welcome to Jason Boyer, our new Systems Administrator.
 - c. Payment pilot: Hopefully this will be in place by late summer or early fall. A suggestion was made to put the date in a different format so that it will be easier to find.

- d. Development of mobile OPAC: an Alpha group will be testing this around the end of the summer. The main features to be tested are catalogue searches, holds, and accessing accounts.
- e. Acquisitions and serials: Currently looking for testing sites; training will start by the end of the summer (perhaps by webinar)

V. Old Business

- a. Claims never checked out: Greensburg-Decatur is testing this.
- b. Kids OPAC: The functionality is not where the testers would like it to be, so this has been put on the back burner for further development.
- c. New circ modifier request: This is a possibility, but would require a lot of work; version 2.4 will be very easy to do, so the issue was tabled until the upgrade.
- d. Cap max overdue fines: This feature is in place and running.
- e. Maximum holds for teachers: According to Vanessa, this has not been a problem recently. Some libraries hold books for teachers or book clubs for several weeks at a time and then renew 3 or 4 times. Please call owning library for permission before renewing multiple times.

VI. New Business

- a. Fall roundtable: Patron record management. Shauna created a presentation for this. A couple of volunteers are needed to give the webinar. Volunteers with different perspectives would be a big help.
- b. Staff permissions audit: Are there any permissions missing from the circ 1 profile? Circ 3 and circ 4 have identical permissions; do we want to alter these in any way? Testing may be necessary to be sure that the policy is the way we want it. E.g. circ 1: overriding / renewals ; accepting payments ; marking items lost. What transactions are most commonly used that everyone should be able to do? What functions should be restricted to certain staff? (E.g. marking items lost/damaged or accepting payments?) Perhaps tiered training is necessary for each circ level.
- c. Standardizing phone number entry across the system: the system does not currently care how the phone number is entered, as long as the required number of digits are there. Should the field have preset dashes to provide consistency? (Dashes in the text message phone field prevents message from sending.)
- d. Email Hold Notices and other Notice Letters: How are these appearing to patrons format-wise? Are they having difficulty reading them? Certain parts, such as titles, could be bolded if necessary. The general consensus is that they are ok as they are. There appears to be some misunderstanding with some of our patrons when they receive the 45 day notice. Apparently, a few think that they will be taken to collections 15 days from the *date of the notice* and not from

the date that the item was actually due. Perhaps change sentence three to read, “Your account may be referred to a collection agency because it is approaching 60 days past due. Your current fines and fees are over \$25.00.” Perhaps an * is needed saying that this total could be higher or lower. A motion was made to change to the above wording. (Graves / Jensen)

- e. Circulation tips from the development survey: A queue was developed from the development survey. Shauna will email the queue results to the committee members. Shauna will also send the link for the previous year’s Evergreen Indiana Summary which was presented at the Annual Meeting.
 - f. Change renewal library to circulating library rather than home library: When the patron renews, the default would be to the circulating library instead of the home library.
 - g. Item is supposed to be marked lost by the owning library: It would be nice for the owning library to know if the lost book is being transited back; perhaps transit slip could be marked that book is in lost status.
 - h. Transit renewals: Could we renew transit items more than once? The Committee recommends that the owning library be contacted for permission to renew a second time.
 - i. Patron visible notes: the option to choose whether a note is Patron visible was taken out in 2.2, but will return in 2.4.
 - j. Conforming to EI policy
 - i. Changing data on other library account
 - ii. ID: some libraries do not require a driver’s license number, but most libraries do. This is not standardized or required in EI. Currently, no recommendation from the Committee.
 - iii. Authorized users: some libraries are letting patrons use other patron cards. The Committee emphasized that this is not to be done.
 - k. Election of officers: Jennifer McKinley will be the Chair-elect, Vanessa Martin will be the new Chair, and Laura Hall will be the new Secretary. Motion approved. (Hilbert / Martin)
- VII. **Announcements**
- a. Migrating libraries: Montpelier Public Library
 - b. The next quarterly meeting will be Tuesday, 17 September, at 10.00 a.m. at the Greenwood Public Library.
- VIII. Motion to Adjourn. (Jones / Graves)