

Circulation Users Group
Wednesday, February 20, 2019
9:30 – 12:00
RAILS Burr Ridge
125 Tower Drive, Burr Ridge, IL 60527

AGENDA

1. Introductions
2. Quarterly Billing – Panel Discussion Linda DuPree BWS, Julie Lombardo, WRS, Cheryl Pawlak, DGS, Helen Pinder, SWAN
See: <https://support.swanlibraries.net/documentation/64665>
 - a. *Suggested that the pre-billing shelf check reports should be done. Shelf check for long overdue and prebilling shelf check.*
 - b. *To reconcile the billing, Julie (WRS) starts with the summary and reviews with detail reports from BCA need to be reviewed and compared against internal paperwork. Look for duplicate charges and credits and reports those for correction. Be careful that if you are testing something, that the work needed to reverse that testing is accurately completed or you will see impact on Quarterly Billing.*
 - c. *Cheryl (DGS) shared that it is important to remember if you FORGIVE bills that are not your library's bill to FORGIVE, you will be charged for that transaction in Quarterly Billing.*
 - d. *Helen reminded us that once an item appears on Quarterly Billing reports, you can now check out the item to DISCARD and allow the system to handle through the DISCARD process. Now that the billing occurs 365 days after overdue, there is no allowance for "flipping" after final Quarterly Billing.*
 - e. *Linda (BWS) works closely with her Business Manager to review Quarterly Billing and appreciates the detail of each transaction provided in the BLUEcloud Analytics reports.*
 - f. *Peggy (ESS) finds the past Quarterly Billing reports helpful.*
 - g. *The essential reports needed to reconcile are included in the summary sheet which is provided with each Quarterly Billing SWANcom.*
3. MAILRETURNED Status for Patrons – Vicki Totton, SWAN
 - a. *Vickie demonstrated the new status of MAILRETD and showed where the documentation can be found on the website.*
<https://support.swanlibraries.net/documentation/66594>
4. Reports that Circulation departments run for Lost and Paid items for selectors – Brittany Smith, WMS
General consensus was that usual MISSING, LOST reports are run for selectors and no additional special reports or processing done to alert selectors of these items.

5. How do libraries handle patron accounts for patrons who have been reported as deceased? – Jorge Perez, RGS
 - a. *Most libraries take the word of the person reporting the death to the library. They will often check for an obituary. One library stated that they do ask for a death certificate to close out the account. Generally, fines are forgiven.*
6. How do libraries serve homeless patrons regarding issuing library cards? - Nathan Hare, OLS
 - a. *Downers Grove library shared their practices and Cheryl offered to share their practices with anyone who wanted to know more. They work with PADS and a local church. Most recently they have gone to the local PADS and registered users there. They also do programming on how to use library services.*

BREAK

7. What are people doing with the NOCA list of BADADDRESS? – Mary Moss, EPS
 - a. *Some are barring the patrons and removing the BADADDRESS status. They are also putting in detailed notes in the patron account. Others are sending out mailers to the patron's new address. Crystal Vela noted that a form letter is on the SWAN website under the Circulation Advisory Group documents.*
https://support.swanlibraries.net/sites/default/files/meeting/19_01_16/Exhibit%20D%20NCOA%20Form%20Letter.pdf
8. If you charge patrons for faxing, what is the cost? Any difference for in-state, out-of-state? – Mary Moss, EPS
 - a. *Most libraries offer the service, prices vary. Some allow international faxing at \$2/page*
9. Regarding the delivery fine count: I only see last November on the RAILS webpage. Has anyone else signed in? – Mary Moss, EPS
 - a. *Mary found the information needed and rescinded the question.*
10. How does your Reference Department handle items that patrons have requested be pulled from the shelves and put aside for patrons to come in and pick up? – Stephanie DeYoung, Batavia PL
 - a. *Some libraries follow the SWAN recommendation that when a patron calls in a hold, the reference/children department places the hold and then circulation can trap the hold. This allows patrons to receive notices in the event they are unable to pick it up immediately and it will be on your clean hold shelf report. Another benefit is that it will show on the patron record in WF as well as Enterprise. There are some libraries that use a generic user and have a different color hold wrapper to easily identify these items that are checked out on a generic user card. Some use this practice when a patron does not have a library card yet. . Many noted that it is important to not circumvent hold queues when pulling items for patrons and making sure communication with patron on the phone is clear about whether a hold can be placed and trapped for the user requesting the item.*
11. Book club collections – Do libraries loan these to other libraries? Crystal Vela, SWAN

- a. *ESS (ILL)*
 - b. *DGS (only DGS)*
 - c. *Messenger (ILL)*
 - d. *WMS (Maybe)*
 - e. *Vickie talked about Circulation sets and asked everyone interested to send in a ticket and she will set up it up for them.*
 - f. *Debbie Walsh will bring this to ARRT and see if they have an updated list they can share.*
12. Best practices for book discussion books. – Julie Lombardo, WRS
- a. *Should be checked out to a user, book club card.*
 - b. *Ask selectors not to place the holds too early or place the hold and suspend them until needed.*
 - c. *It was suggested that regardless of how many titles the consortia owns, you should first request items from SWAN first and if necessary then go outside of the consortia.*
 - d. *If you want a best seller for your Book Discussion group, you should purchase all copies.*
13. Topic for April, 2019 Circ Users Group Meeting: standardizing billable vs. non-billable damage of loan items. Planning only. –Jeri Cain, CSD
- a. *Many voiced their opinions that simply creating a basic level of what should be considered damaged or unusable isn't feasible. Not only are there various definitions of those terms amongst one library's selectors, each library has their own interpretations of what those terms mean. Patrons also have differing views of what is acceptable and may prefer the item sooner regardless of condition. Most libraries allow their patrons to make that choice and will return the item to the home library if refused by the patron due to condition.*

Next Meeting Dates:

- Circulation Advisory Group- March 20th
- Circulation User Group-April 17th