SWAN Circulation Advisory Notes  
September 19, 2018

Committee members present: Sandra Leyva (AMS), Julie Lombardo (WRS), Cynthia Maiello-Gluecklich (MPS), Debbie Sheehan (INS), Cheryl Pawlak (DGS), Jessica Nawrocki (FRS), Roberta Richter (LPS), Brittany Smith (WMS), Peggy Tomzik (ESS), and Sue Feddersen (BVD)

Absent: Victoria Muraiti (RFS)

SWAN staff present: Crystal Vela, Samantha Dietel, Helen Pinder, Vickie Totton, Rudy Host Joseph Miller, Aaron Skog, Dawne Tortorella

Visitors present: Juan Estrada (LSS), Francisco Cruz (CIS), Sandra Baumgartner (CIS), Irene Emmanuel (FPD), Elizabeth Dejong (SHS), Mary Moss (EPS), Christine Sporleder (BDD), Stephanie DeYoung (BLD), Jeri Cain (CSD), Pat Sinacore (WCS), Debbie Walsh (NUD), Linda DuPree (BWS), Mary Malach (MED), Nathan Hare (OLS), Megan Moran (OLS), Elizabeth Wald (CRS), Carrie Jeffries (GED), Katarzyna Tomasik (BVD), Crissy Barnat (CWS), Leigh Anne Voss (RGS), Thomas Webb (MTS), Marla Wieringa (MTS), Leslie Hartoonian (LGS), Mary Zappa (FPD), Kathy Zaleta (HSS), Teri Wilson (Green Hills)

32 SWAN Libraries represented.

1. Introductions
   a. Housekeeping
      Fact: It is International Talk Like a Pirate Day
      Question: How much does a pirate charge to pierce an ear?
      Answer: A buccaneer (thanks to Aaron Skog for sharing)

2. Review of Notes, July 18, 2018
   Notes were reviewed and approved without modification from July 18, 2018. Upon approval, notes will be posted on the SWAN support site for reference and archival purposes.

3. Circulation Advisory Committee Chair
   Crystal Vela will continue as Chair; Samantha Dietel is now serving as Co-Chair.

4. Patron Information Display in Workflows (continued action from July meeting)
   a. Identify User section to display address field information (action requested)
      Approve inclusion of selected address fields (Care Of, Street, City, Zip, Phone, Email, Home phone) in display of Identify User section in Workflows. Circulation Advisory was given access to the test server to see how it would look.

      Discussion: All committee members asked staff to review the screens in Workflows with selected address fields displayed in Identify User section on all screens. Circulation staff felt the additional information on screen added to screen clutter, required more scrolling, and was redundant rather than helpful. Some libraries rely on notes extensively, so having additional information on
every screen made notes less prominent.

Some mixed reviews from Adult Services staff who liked having easy access to the additional information.

Experienced staff in searching for patrons by the recommended practice (LastName and Birthdate) did not find benefit to the additional information on screen. Recommendation to reinforce searching habits and share with all staff this practice.

For school-use only cards, this information is useful to see on screen (BVD), but staff have instituted other search behaviors to appropriately identify these patrons.

Action: the Committee was unanimous – DO NOT INCLUDE selected address fields (Care Of, Street, City, Zip, Phone, Email, Home phone) in display of Identify User section in Workflows. Keep Workflows Identify User section display as currently configured.

b. Address and Extended Info Field consolidation – Committee recommendation [Exhibit B] (action requested)

Discussion: Cheryl reviewed the sub-committee’s work. The full Committee thanked the sub-committee on their work and recommendations.

Action: Committee unanimously approved the recommendations of the sub-committee.

Next Steps: SWAN staff will begin the process of implementing these changes.

   a. Items sent through ILL require a machine-readable barcode
   b. Packaging material is not billable as part of an ILL circulation

Action: Committee unanimously approved the following additions to the Circulation Policy, to be sent to the SWAN Board for approval in October.

1) General Circulation Rules i) All items that can be checked out and or returned at another SWAN library must have a codabar barcode on the item.

4) Financial Concerns e) Packing materials for ILL material is not billable.

6. NCOA standard for patron records
In July, the Committee began discussion of the work needed to make National Change Of Address processing most beneficial. Prior to sending Unique Management SWAN patron data, the sub-committee’s recommendations should be completed. In addition, the current patron clean-up process underway will help reduce inactive patrons before sending the data.

Libraries should review those patrons inactive from the migration with notes saying Verifying Address Due to Migration. It was agreed that SWAN should remove these patron records if there has been no activity since records were initially migrated. Usual patron purge restrictions such as outstanding bills will restrict some of these records from being purged.

Vickie led the review of processing considerations and behavioral outcomes requested through this process.

a. Provide a consistent Note in the patron record. The Committee approved the following wording: *Verify Address due to NCOA – SWAN 2018 (Original Street, City, State, Zip)*

b. What constitutes an important change? It is requested that the following actions on the patron record be analyzed:
   - Format only change [do not bar]
   - Address change [bar]
   - SWAN could also bar patrons after processing, working with a list of patron barcodes.

c. Should any patron records be excluded from sending for processing? Yes, BVD wants to exclude School-Use Only students, Special and Academic library users, and some libraries may want to review their profiles for exclusion (e.g. Teacher cards, Non-resident cards, Businesses)

d. Committee agreed that an annual process would help libraries manage patron records and can introduce efficiencies in the future such as using expiration date = NEVER and relying on inactivity and address changes out of library district to determine purge criteria.

7. SWAN Updates & Discussion

a. Billing Notice wording [Exhibit D]-Completed

   Modified bill notice wording at bottom of bill – Implemented in July
   Approve change in bill wording at bottom of individual bill from “TOTAL AMOUNT DUE” to “TOTAL AMOUNT DUE FOR THE ABOVE.”

b. 3.5.3 Release in October

   Scheduled overnight from Wednesday October 10th at 10:00pm to Thursday October 11th at 6:00am, SirsiDynix will be upgrading SWAN’s Symphony ILS and WorkFlows from version 3.5.2.1 to 3.5.3. This upgrade will require intermittent downtime throughout the overnight hours. The system is expected to be available when libraries open Thursday morning.
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c. Billing and Bill Reasons [Exhibit E]

Helen provided an overview of the Billing based on transactions that occur in the system. If the system knows information about the item, item status, and the user, billing decisions can be programmatically determined. The Bill Owner drives the quarterly billing process. Bills are owned by the item library. Bill Owner for LOST bills are the checkout library.

From the flowcharts Helen shared, there was a recommendation to modify the Damaged flowchart to capture patron information and create a bill for the damaged incurred.

It was noted that RB_ILL patron is used incorrectly quite frequently. Members need education in these areas. Library staff are using LOST instead of DAMAGED. It was recommended that user ids be changed so that they can more easily be selected when checking item out. DAMAGED user has become a parking lot. RB_ILL LOST triggers billing.

Committee recommended the following user ids be created and clear instructions sent on how to use them for processing items lost, damaged, or determined unusable between libraries.

- LOST RB_ILL
- DAMAGED RB_ILL
- UNUSABLE_ILL

Once these user ids have been created/renamed, documentation and communication is needed to the membership explaining how/when to use.

d. BLUEcloud Analytics Tracking Update

Schedule changes have allowed BLUEcloud Analytics harvest and processing to be complete usually by 9 AM which includes previous day’s activity.

e. Report Scheduling Review

- Combined Clean Hold Shelf Report, including update to include barcode Scaled back to older version due to issues. Working on a solution with SD

f. Consolidation of Overdue Notice Intervals [Exhibit F]

Sam presented data on the number of notices which are produced earlier than 7 days illustrating that this impacts few patrons. SWAN recommends consolidating overdue notices and using consistent frequency of notice, regardless of loan rules.

Discussion: Since patrons receive courtesy notices, they know when items are due. Moving to a consistent frequency of Overdue notices, with first notification at 7 days
allows staff to communicate this more clearly to patrons. Patrons have commented that they wish they had been notified sooner regarding overdue when they receive their first Overdue notice at 14 days. Moving to 7 and 21 days provides a good sequencing of Overdue Notice (7 days), 2nd Overdue Notice (21 days), Bill (42 days).

Motion – Peggy Tomzik: Consolidate Overdue Notices, effective October 1, 2018, to produce overdue notices at 7 and 21 days, regardless of loan rule.
Seconded – Debbie Sheehan
Approved – unanimous

SWAN will put new notice schedule into place on October 1st and provide an announcement. Changes will be reflected, starting October 2nd.

8. Agenda Building for Next Meeting
   a. Discussion of timing on collections and if set by library. Discuss entire process of Collections.
   b. Elections – self nominations need to be opened up in October. New members presented at November meeting. May need to look at terms and balancing via short term for some open seats. This year 4 seats will be open. Next year 7 seats.

9. Open Forum and Library Updates
   a. BVD – New Youth Service position open, new Coordinator hired
   b. INS – Parking lot project is nearing completion; worked with Sam on coordinating change in loan rules to accommodate difficulty entering building
   c. ESS – will be hiring a Circulation Clerk
   d. WRS – hiring a Circulation Clerk, has received many applications. Will begin circulating Launchpads, but they will not circulate via ILL. No longer sending out new items and reduced renewals to 2. Experiencing doubling of items received via ILL.
   e. WMS – hiring, New Assistant Manager hired
   f. DGS – lobby remodel will change the location of the Circulation Desk
   g. AMS – Closed Friday 9/21 for In-Service, Pages are moving out of Circulation into Youth Services and Adult Services and will be hiring 6 new pages. Asked about a SWAN Reference User Group
   • RAILS has Reference Users Group
   • Aaron mentioned opportunities to participate in SWAN’s Discovery and User eXperience Group (DUX)
   • Dawne mentioned the possibility of creating a User Group for E-resources in 2019
   h. BWS – Still looking for a new Director