Chat Log   Circulation Users 2022_04_20

BKS_Zamaira Vega (to Everyone): 9:39 AM: When would it be appropriate to use the Bill User for item?

Barb Bronkala (to Everyone): 9:39 AM: Best practice would be?

Zac Frazier (to Everyone): 9:39 AM: Sort of tangential, but with damaged items, should we bill for it and then check it out to discard?

Crystal Vela (to Everyone): 9:40 AM: https://support.swanlibraries.net/documentation/64712

Helen Pinder (to Everyone): 9:40 AM: @Zamaira You would want to bill the patron for an item for reasons other than LOST. Just keep in mind the item status will not be changed.

Helen Pinder (to Everyone): 9:41 AM: Best practice is to use the wizards.

Barb Bronkala (to Everyone): 9:42 AM: thank you

Sarah Brown (to Everyone): 9:42 AM: if the user is reporting item lost, but not paying, how do you mark it

Jane Young (to Everyone): 9:44 AM: So mark item lost wizard if patron is paying now and bill user wizard if patron is not paying now, correct?

Zac Frazier (to Everyone): 9:46 AM: Thank you for all the info

Helen Pinder (to Everyone): 9:50 AM: https://support.swanlibraries.net/documentation/64708

Sarah Brown (to Everyone): 9:51 AM: Thank you

SWAN - Dawne Tortorella (to Everyone): 9:52 AM: Would it help if we develop some scenario workflow diagrams for common scenarios? If so, anyone want to volunteer to work with us on documenting/reviewing your practice?

Jane Young (to Everyone): 9:52 AM: Thank you,

Sandra -AMS (to Everyone): 9:52 AM: What about the patrons who wish to pay the bill online but the item is still checked out?

SWAN - Dawne Tortorella (to Everyone): 9:53 AM: great! Thanks Peggy - of course we will recruit Helen to work on this too.

Sarah Brown (to Everyone): 9:53 AM: Should we eliminate some of the choices on the drop down screen?

Helen Pinder (to Everyone): 9:54 AM: Training session on billing with scenarios: https://support.swanlibraries.net/training/87214

Sarah Brown (to Everyone): 9:54 AM: A gathering of the smart people!

Barb Bronkala (to Everyone): 9:55 AM: yes

Dana St. Charles (to Everyone): 9:55 AM: Do libraries charge processing fees for other libraries books that your patron is paying for?

Sarah Brown (to Everyone): 9:55 AM: YES!

Theresa Lang (to Everyone): 9:55 AM: How many libraries charge a processing fee?

Theresa Lang (to Everyone): 9:56 AM: Thanks Vickie, that's what I was curious about

SWAN - Dawne Tortorella (to Everyone): 9:58 AM: https://support.swanlibraries.net/meetings-trainings/training/search

SWAN - Dawne Tortorella (to Everyone): 9:58 AM: https://support.swanlibraries.net/training/90440

BKS_Zamaira Vega (to Everyone): 10:00 AM: I still have the flowcharts. I can send them to anyone who wants them :)

Helen Pinder (to Everyone): 10:01 AM: Haha! I'm glad to know they're still out there!

JESSICA NAWROCKI (to Everyone): 10:01 AM: For billing, I like the written directions from SWAN that already exist.   For stolen items, I do waive the bills.   I do not require a police report, but the person did bring one in.

Theresa Lang (to Everyone): 10:01 AM: No, we don't go beyond billing/collection. If they mention a theft, we tend to waive the amount due.

Barb Bronkala (to Everyone): 10:02 AM: I would say it would be a case to case as well

Barb Bronkala (to Everyone): 10:02 AM: We let the billing follow through with SWAN

Vickie Totton - SWAN (to Everyone): 10:02 AM: After a quick count 23 libraries charge a processing fee

Theresa Lang (to Everyone): 10:03 AM: Thanks Vickie!

Barb Bronkala (to Everyone): 10:03 AM: Working with the patron seems to be the way to go

Zac Frazier (to Everyone): 10:04 AM: Some of our patrons will throw things away in the parking lot garbage cans, and in the past we have lowered the price on items based on if the selectors want to repurchase it and how much that would cost

Theresa Lang (to Everyone): 10:05 AM: We also do an Amazon price match

Barb Bronkala (to Everyone): 10:05 AM: Yes, we will do that as well

Sandra -AMS (to Everyone): 10:06 AM: We also do the same with all patrons not only AMS patrons.

Sandra -AMS (to Everyone): 10:06 AM: as long it's an AMS item.

Teri - GHS (to Everyone): 10:07 AM: At Green Hills we do our best to work with patrons. If theft, fire we do ask for a police/insurance report, and will waive the fees upon proof.

Pam Kamin-GSD (to Everyone): 10:07 AM: GSD will adjust the price as well

Helen Pinder (to Everyone): 10:07 AM: WMS does that, I believe.

Pam Kamin-GSD (to Everyone): 10:08 AM: I remember that too, Peggy, but don't recall who said it

SWAN - Dawne Tortorella (to Everyone): 10:08 AM: I thought it was Downers

Vickie Totton - SWAN (to Everyone): 10:08 AM: DGS

Jeri Cain (to Everyone): 10:11 AM: 30 days we hold damaged

Dana St. Charles (to Everyone): 10:11 AM: Our damaged items are recycled at 30-days and our bill letter states that.

Barb Bronkala (to Everyone): 10:11 AM: We keep it for 6 months, with a note on patrons card "hold till the 6 month date". After the 6 months we discard the item and make a note in the patons record that "damaged item has been discarded"

julie (to Everyone): 10:11 AM: We keep things for approx. 6 months to a year.   After that, no, we do not worry about it.

Stephanie DeYoung (to Everyone): 10:12 AM: We keep damaged items

for 45 days. If not paid for and picked up, we do a follow up email giving a few more days bfore discarding. We also take pictures.

Jane Young (to Everyone): 10:12 AM: We had a patron come back after items were tossed. She demanded proof and wanted to see it. We ended up having to waive the bills.

Laura Garcia HKS (to Everyone): 10:12 AM: At Hodgkins we keep items for about 1 year, after that we discard the item.

Mary Malach (to Everyone): 10:13 AM: At Messenger we keep them for 6 months and we do take pictures

Jane Young (to Everyone): 10:13 AM: that's a great idea!

Theresa Lang (to Everyone): 10:14 AM: If the item is mouldy do you keep it for that length of time as well?

Jane Young (to Everyone): 10:14 AM: We do - in bags

Barb Bronkala (to Everyone): 10:14 AM: We ususally have the item in a bag as well

Sarah Brown (to Everyone): 10:14 AM: On our items we only charge $5 regardless of item for damage.

Sarah Brown (to Everyone): 10:14 AM: Exctly

Barb Bronkala (to Everyone): 10:15 AM: Our opening clerks count theri money before the day starts

Barb Bronkala (to Everyone): 10:16 AM: Then we count the end of shift as well as the close of day

Jane Young (to Everyone): 10:16 AM: We count the drawer in the morning and in the evening. Whoever is on duty - two clerks do it together.

julie (to Everyone): 10:17 AM: our business office people count the drawer daily

Zac Frazier (to Everyone): 10:17 AM: I don't have a mic available, but at Oak Lawn we at Circ count within the last hour before closing, make sure the money is balanced, and take any profits down to the business office.

Patricia Sinacore (to Everyone): 10:17 AM: The cash registers are counted each morning by a librarian along with the cash box.

Jeri Cain (to Everyone): 10:18 AM: We seldom use cash anymore - other

than to make change. we balance drawer once per week. it is done by Circ Coordinator.

Theresa Lang (to Everyone): 10:18 AM: we also have a business office who does it once or twice a week - our main cash transactions are for the Friends book sale area

Jane Young (to Everyone): 10:19 AM: The closers here must make sure the register balances.

Mary Malach (to Everyone): 10:19 AM: We count the drawer every morning and run a daily report. We reconcile and do a deposit weekly. Since going fine free, we take in very little but are still frequently asked for change for the copier, etc

BKS_Zamaira Vega (to Everyone): 10:20 AM: We count ours in the morning and closing. A clerk counts and closes out the drawer but a manager watches them count it. We reconcile it everynight with petty cash. Petty cash is reconciled once a week. The clerks sign and initial the receipt at night. That receipt gets thrown into a drop box.

SWAN - Dawne Tortorella (to Everyone): 10:24 AM: Limited Use Profile documentation - https://support.swanlibraries.net/documentation/90840

Zac Frazier (to Everyone): 10:28 AM: From what I know, we will only make cards for those who have some sort of documentation that they have been staying at a local shelter

Theresa Lang (to Everyone): 10:30 AM: Does anyone issue cards to individuals who aren't associated with a shelter?

Patricia Sinacore (to Everyone): 10:32 AM: Visitor passes are given to patrons without cards for computer usage

Sarah Brown (to Everyone): 10:32 AM: You could restrict card to local use only and no ILL

Mala A-St Charles (to Everyone): 10:32 AM: We honor the local /temporary shelter address with a letter from the shelter director and use the "LimitedUser" profile to issue the card

Theresa Lang (to Everyone): 10:36 AM: We have a fairly large group of people who have various problems with the shelter, so that's why I'm curious if others face the same situation and if so, what do you do with

the address field?

julie (to Everyone): 10:40 AM: we have, in the past, issued cards to people in half-way houses, women's shelters, etc. but found we lost way too much material and $$ to continue.

JESSICA NAWROCKI (to Everyone): 10:40 AM: We don't have a lot of homeless patrons, so it isn't an issue here.   We had an issue with the nursing home.   They would help us find the items, but they had so many items that they had to find that eventually they limited the patron checkouts.   To be clear, this was not us limiting the checkouts, it was the nursing home.

Theresa Lang (to Everyone): 10:42 AM: to ask a possibly stupid question - is the address only required as a means to try and track items down? Is there a legal reason to have a residential address listed?

SWAN - Dawne Tortorella (to Everyone): 10:43 AM: https://support.swanlibraries.net/documentation/64676

Theresa Lang (to Everyone): 10:44 AM: Ok, thank you!

Jeri Cain (to Everyone): 10:45 AM: At this time or accounts policy says that residence verification is needed to get a card.

Jane Young (to Everyone): 10:45 AM: we waive them

Jeri Cain (to Everyone): 10:45 AM: We offer take aways from our friends sale if they would like to tae materials from there.

Jeri Cain (to Everyone): 10:46 AM: yes

Sarah Brown (to Everyone): 10:47 AM: I recently worked with RDS to assist their former user in obtaining her card at 18 who now lives in RPS.

Mala A-St Charles (to Everyone): 10:47 AM: What will be the best practices to handle patrons turning 18?

Sarah Brown (to Everyone): 10:47 AM: We however waive fees.

Jeri Cain (to Everyone): 10:49 AM: We ask the patron if they have the materials and can find them. If not, we remove the items from their account.

Vickie Totton - SWAN (to Everyone): 10:49 AM: Legal Opinions https://support.swanlibraries.net/documentation/66923

julie (to Everyone): 10:51 AM: if the parent has signed for responsibility

and patron is under 18, we will discuss any account info with the parent

Barb Bronkala (to Everyone): 10:51 AM: yes Sarah, that is what we do as well with those signing for the library card

BKS_Zamaira Vega (to Everyone): 10:52 AM: We actually have a form that the patron fills out and signs saying they give the right for someone else to pick up for them. Other than that if they are not someone who can pick up for the person we don't allow it.

Theresa Lang (to Everyone): 10:52 AM: It depends on the situation - if they have the card then we assume that they have permission to get items out. If they don't, then we will contact the member to get their permission. We've had issues with messy divorces, youth who are transitioning, etc

Barb Bronkala (to Everyone): 10:52 AM: And yes Julie, we discuss with the signer of the card for the minor

Dana St. Charles (to Everyone): 10:52 AM: We don't share fines/fees or title info and we only check out to an account if the patron has the library card#

Jes Raye (to Everyone): 10:52 AM: We will only give out information for an account for the patron themselves or the guardian listed on a minor's account. Even if the spouse is authorized to pick up for a patron's account, we do not give out any account information or records without explicit permission of the card holder.

Helen Pinder (to Everyone): 10:52 AM: Back in the before times when I worked a desk, a hold would be relinquished to a person with the card. Our reasoning was consent to allow another party to collect the item followed the card.

Jane Young (to Everyone): 10:53 AM: Patrons must have a note in their record if they want others to pick up their materials. For children under 18 the parents can pick up materials.

Jane Young (to Everyone): 10:53 AM: We do not give out account information to others

julie (to Everyone): 10:54 AM: When you say you don't give out information, do you know that the email address on the minor's account

is that of the minor or the parent?

Jes Raye (to Everyone): 10:54 AM: By default we don't keep title info, so even when signed guardians ask what their minor is checking out we don't have that information to give them.

Helen Pinder (to Everyone): 10:54 AM: Best practice would probably be to refer the adult to Aspen. Accounts can be linked and tracked there.

Jane Young (to Everyone): 10:55 AM: email and phone number in juvenile records is the parent/guardian

Jane Young (to Everyone): 10:55 AM: we do not

Mala A-St Charles (to Everyone): 10:55 AM: We will give out information to the parent whose name is on the C/O address field

Theresa Lang (to Everyone): 10:55 AM: No, we ask if the person signing them up is the parent/guardian

Victoria (she/her) (to Everyone): 10:56 AM: we do not

BKS_Zamaira Vega (to Everyone): 10:56 AM: What does everyone do when a patron under 18 wants to change their legal name?

Helen Pinder (to Everyone): 10:56 AM: Linking accounts in Aspen: https://swanlibraries.net/your-library-account/linking-accounts/

Sarah Brown (to Everyone): 10:57 AM: Only if they own the account as parent/guardian

Jes Raye (to Everyone): 10:58 AM: We use the preferred name field to enter the name they would like to go by.

julie (to Everyone): 10:58 AM: Wait for legal documentation

Jane Young (to Everyone): 10:58 AM: The parent actually came in with them - that was our only experience with this.

Jes Raye (to Everyone): 10:58 AM: We do

Victoria (she/her) (to Everyone): 10:58 AM: We change it-we have had parents come with their child to change it as well

Sarah Brown (to Everyone): 10:59 AM: We allowed a mother of a trans gender to re-register for a new card with the new name

Sandra -AMS (to Everyone): 10:59 AM: I will only

Victoria (she/her) (to Everyone): 11:00 AM: I didn't hear the first part of the question

Sandra -AMS (to Everyone): 11:00 AM: I will only give them a register receipt with only the amount paid.

Victoria (she/her) (to Everyone): 11:01 AM: just the receipt for what they paid for

Sarah Brown (to Everyone): 11:01 AM: Only if they have the library card

Sarah Brown (to Everyone): 11:05 AM: How do you deal with collections w/a 14 year old?

Victoria (she/her) (to Everyone): 11:05 AM: This would be a great topic for an EDI committee to write up a best practice for

Victoria (she/her) (to Everyone): 11:06 AM: yes we do

Jes Raye (to Everyone): 11:06 AM: We do as long as the account is not blocked.

JESSICA NAWROCKI (to Everyone): 11:06 AM: Yes

Jane Young (to Everyone): 11:06 AM: missed the question

Jane Young (to Everyone): 11:07 AM: yes

Sarah Brown (to Everyone): 11:07 AM: No

Jane Young (to Everyone): 11:08 AM: ID if it has current address; or current ID and a recent utillity bill or other acceptable proof of residency with their name on it.

Victoria (she/her) (to Everyone): 11:08 AM: We only require one piece unless their ID isn't updated, then we ask for 2. No issues

Sarah Brown (to Everyone): 11:08 AM: Picture ID w/in town address

Jes Raye (to Everyone): 11:08 AM: We still require two because we've had a lot of issues with applicants using outdated IDs.

Barb Bronkala (to Everyone): 11:08 AM: 2 pieces of identification. A current picture id and some "formal" mail, utility bill etc. Reason being some people do not change their picture id in a timely manner.

Teri - GHS (to Everyone): 11:09 AM: Peggy, if no collections, do you have checkout restrictions (ex. no video games/dvds) for the 14 year old?

Laura Garcia HKS (to Everyone): 11:09 AM: If the address is current in their ID, we just take their ID if address is different, we need utility bill (at least 2) we try to be simple

Victoria (she/her) (to Everyone): 11:09 AM: we also do not use

collections and no check out restrictions besides limit of 100 items

Teri - GHS (to Everyone): 11:09 AM: Ok, thank you!

Jeri Cain (to Everyone): 11:09 AM: if drivers licence has CS address - just that. the only issue is outdated as we learned from NCOA run

Sherri Harrison - BLD (to Everyone): 11:10 AM: We require a photo ID and an acceptable proof of residency document.

julie (to Everyone): 11:10 AM: Can we discuss with the SWAN staff their plans for all of us to start using the transit label generator? And, when?

Jane Young (to Everyone): 11:11 AM: that's why we rely on NCOA

Sarah Brown (to Everyone): 11:12 AM: Are we married to the new routing slip? Circling at the bottom slows processing and could accidentally mark item cover

Debbie Sheehan (to Everyone): 11:13 AM: When is BC CIrc available?

Sarah Brown (to Everyone): 11:14 AM: Yes

Sarah Brown (to Everyone): 11:14 AM: Thank you

Samantha Dietel - SWAN (to Everyone): 11:16 AM: L2 link for the BLUEcloud Release Member Update on Monday, 4/25: https://librarylearning.org/event/2022-04-25/swan-bluecloud-central-release-2203-member-update

Debbie Sheehan (to Everyone): 11:18 AM: Thanks Peggy!

Barb Bronkala (to Everyone): 11:18 AM: Thank you

SWAN - Dawne Tortorella (to Everyone): 11:20 AM: https://support.swanlibraries.net/documentation/64874

SWAN - Dawne Tortorella (to Everyone): 11:21 AM: https://forums.swanlibraries.net/t/new-rails-transit-slips/1023/2

Vickie Totton - SWAN (to Everyone): 11:22 AM: Circulation and Hold Map Office Hours https://librarylearning.org/event/2022-01-19/swan-circulation-hold-map-office-hours

Sarah Brown (to Everyone): 11:22 AM: Thank you for a great session!

Victoria (she/her) (to Everyone): 11:22 AM: Thanks!!

Laura Garcia HKS (to Everyone): 11:22 AM: Thank you everyone !

Jane Young (to Everyone): 11:22 AM: Thanks!

Theresa Lang (to Everyone): 11:22 AM: Thanks everyone for another great, informative session!

Stephanie DeYoung (to Everyone): 11:22 AM: Thank you!

Jeri Cain (to Everyone): 11:23 AM: Thank you all!

Victoria (she/her) (to Everyone): 11:23 AM: you too!