Circulation/ILL Advisory Group Minutes

December 11, 2020

Attendees: Julie Gibson, Crystal Lake; Louise Neidorf, Wilmette; Maggie Rodriguez, Round Lake; Rosalie Scarpelli, Palatine; Erin Seeger, Northbrook; Laurie White, Ela

Absent: Rosa Lloyd, Indian Trails

Also Present: Sophia Bochula, Prospect Heights; Karen Bolton, Fremont; Maryellen Essig, Niles; Rachel Fisher, CCS; Mieko Fujiura-Landers, CCS; Nina Haselhorst, Cary; Cyndi Rademacher, Niles; Ginnie Vehlow, Grayslake; Debra Wischmeyer, CCS

The December 11, 2020 meeting of the Circulation/ILL Advisory Group was called to order at 9:35am. The meeting was held via Zoom. M. Fujiura-Landers began the meeting by taking roll and introducing guests. There was one addition to the agenda.

1. Missing Part Check In and Notices

Missing Part check in mode allows libraries to automatically update an item's status to "Claim Missing Parts" and issues a notification to the patron. However, notifications are sent by the transacting (or check out) library and not by the library who checks the item in. In a consortium environment, the check out and check in libraries may differ. As a result, both the notice set up and workflow need to address this possibility. M. Fujiura-Landers presented on two workflow and notice set-up options.

The group discussed the merits and challenges of both options. Questions and comments included:

- How can libraries identify items checked in with Missing Part check in?
  - M. Fujiura-Landers said there were reports available that identify items with a status of claim missing parts. A follow-up question asked if reports reflect items checked in at your location or items owned by your library? M. Fujiura-Landers will test and follow-up with an answer. (*Post-meeting edit: the reports reflect items owned by your location.*)
- Once an item is in claim missing part status, will it automatically flip to Lost at a certain point?
  - M. Fujiura-Landers said that staff will have to manually mark these claimed items as Lost.
- Will the claimed missing parts item appear in the patron's PAC account?
  - M. Fujiura-Landers will test and follow-up with an answer (*Post-meeting edit: once the item is claimed missing parts, it will not appear on the patron's PAC account. Only staff can see the item in Leap/staff client.*)

Because there was a level of uncertainty over the mode, the decision was made to offer this notice as an opt-in service for now. Libraries can ask to have the notice turned on prior to using Missing Part check in. Libraries can also decide not to use the notice and check in mode and continue to follow their local practice for managing items with missing parts. M. Fujiura-Landers will prepare documentation and review workflow at the next Circulation Technical Group meeting.

2. Items Catalogued as Serials vs Monographs

The CAMM group is interested in feedback on patron/staff experience with placing holds on certain types of titles – titles that contain multiple editions on the same record. These titles are currently cataloged as monographs, which allow for volume-level holds. They are exploring a potential change to cataloging these items as serials, which would prompt patrons to place item-level holds. M. Fujiura-Landers gave a brief presentation on the topic and demonstrated the behavior of the two types of records in the PAC and Leap.

The committee inquired why this change is being proposed. From a patron perspective, the patron would prefer to get the title regardless of which copy they placed the hold. They are concerned item-level holds will require more staff intervention or delay the request for the patron. The group determined that the way these titles are cataloged now currently works for patrons and should not be changed.

3. Library Card Expiration Notice

The library card expiration notice is sent to patrons whose cards will expire in 31 days. This notice is optional, and libraries can choose if they want to issue the reminder or not. The notice currently uses standard text which asks patrons to come into the library to renew their card. CCS has received a couple of requests to customize the notice text due to reduced or adjusted service during the pandemic. CCS is looking for approval from this group to allow custom text for this notice.

Committee members mentioned that library websites often have abundant information on renewal options. However, the group agreed that in the current environment, if libraries have the need for a custom notice message they should be allowed to customize. CCS will reach out to the libraries who have requested customization and work with them to configure notice. They will also offer customizations to the notice in the next CCS eNewsletter.

4. Training Website Feedback

CCS launched training.ccslib.org over the summer as virtual training for the Grayslake/Palatine migration. Post-migration, the intent is to maintain and build up the site as a training resource for all CCS libraries. CCS is interested in feedback on topics to add, what learning activities are the most helpful, and how the site can be improved.

Suggestions from the group included:

- Including content on becoming a fine free library
- Including information on patron purges and other data cleanup
- Continuing to use the independent activates as a learning method

5. Computer Services during Building Closure (Addition to the Agenda)

N. Haselhorst (CPQ) asked if there were any libraries present on the call who are offering computer appointments while the building was closed for general browsing. None of the libraries present were offering in-person computer appointments. One library has Chromebooks available for checkout. Another library mentioned promoting parking lot Wi-Fi to their users.

The meeting was adjourned at 10:56 am.

Summary of Next Steps

Who	What	When
CCS	Create documentation on Missing Part check in; present to the Circulation Technical Group	January 2021
CCS	Offer custom library card expiration notices	December 2020
CCS	Continue to create new content for training.ccslib.org	Ongoing