# **Circulation/ILL Advisory Group Minutes**

December 9, 2022

**Attendees:** Kim Hegelund (WLK); Belinda Husak (ALK); Rachel Quan (LVK); Alisha Smaby (RLK); Ann Marie Thomas (PHK); Courtney Volny (WNK)

**Absent:** Bob Bigden-Russell (ZIK)

**Also Present:** Mieko Fujiura-Landers (CCS); Debra Wischmeyer (CCS)

The December 9, 2022 meeting of the Circulation/ILL Advisory Group was called to order at 9:31am. The meeting was held via Zoom.

There were no revisions to drafted minutes of the September 9, 2022 Circulation/ILL Advisory Group meeting. Minutes accepted as submitted.

There were no additions to the agenda.

## 1. CCS-Hosted Department Distribution Email

The Advisory Group discussed using CCS-hosted department distribution emails for Circulation and Interlibrary Loan communication within CCS. Many libraries already use distribution lists internally and find them to be beneficial. Notable advantages include:

* Helping the correct staff see messages in a timely manner
* Knowing the message will be seen and addressed, even if some staff are on vacation or have left the library (as opposed to sending it to someone directly)
* Built-in learning opportunity for staff on the distribution list, since they can see how questions are answered and issues resolved

One challenge with distribution lists includes determining if another staff member is already preparing a response to the message. Suggestions to avoid confusion include replying to the list and claiming the question, using Reply-All in any responses, and using the inbox flag to visually show the message has been claimed. The group also suggested incorporating distribution list additions and removals into CCS onboarding documents and help desk ticket options.

## 2. Polaris Phone Verification Settings

Prior to the meeting, Advisory Group members tested a phone verification setting in the Polaris training database. This setting blocks staff from saving a patron record unless phone number fields are formatted a specific way. There are two potential ways this setting can be configured: it can consider all phone numbers during verification, or it can consider just numbers used with text messages. Advisory Group members tested the former setup to prepare for the meeting.

Feedback on the setting included:

* There is an advantage to catching human error, but it can lead to an extra alert when saving records and staff can run into alert fatigue
* However, having numbers formatted a certain way also helps when searching for patrons
* The verification setting would not cause issues for in-house, business, outreach/delivery cards, or ILL library cards
* Staff are mostly consistent with following a recommended format already, so implementing a verification system may not have a noticeable impact on the patron experience
* Patrons could update their phone numbers in the PowerPAC without running into the verification, but patrons tend to reach out to the library to update contact information
* Uniformity is more beneficial than not!

If implemented, there was a suggestion to implement change during new library migration.

M. Fujiura-Landers will update the setting configuration in training so it only considers numbers used with text notices during verification. Advisory Group members will test the second configuration and have a follow-up discussion via email.

## 3. Circulation Report Guidelines

CCS is interested in developing report guidelines for Circulation staff, which would include what reports staff are expected to use and how often. To start the discussion, the Circulation/ILL Advisory Group shared which reports their departments use from Web Reports and the Polaris Staff Client and how frequently, with most reports being used daily (Monday-Friday) or monthly.

The use of some daily reports, such as the Daily Detail Payment report and Patron Mismatch report, can vary based on library need; some libraries use daily others will use as needed. Reports or reporting tools that impact the patron experience, such as generating print notices and Daily Search Shelves report, tend to be used daily.

The group also discussed the perceived impact of reports. Reports used daily have higher perceived impact, since they impact the patron experience. Reports used monthly, such as patron data cleanup reports, have a lower perceived impact since they generally do not impact the patron experience.

Additionally, while libraries have different statistical reporting needs, they would benefit from recommendations on statistical reports available through Web Reports. This would help to connect libraries with the most effective statistics for board reports.

CCS will continue to examine report use guidelines for Circulation staff.

A. Thomas (PHK) moved and B. Husak (ALK) seconded to adjourn the meeting. The meeting was adjourned at 10:54 am. The Circulation/ILL Advisory Group will next meet March 17, 2023.

## **Summary of Next Steps**

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| **Who** | **What** | **When** |
| Advisory Group | Test second phone verification configuration in training; discuss experience via email | December 2022 |
| CCS | Consult with CCS IT on creation of department distribution emails | Winter 2022/2023 |
| CCS | Continue to examine Circulation report guidelines | 2022/2023 |