# **Circulation/ILL Advisory Group**

# **Agenda - June 9, 2023**

# **Zoom, 9:30 a.m.**

Meeting Access Information:
URL: <https://us02web.zoom.us/j/89913026393?pwd=YTJOMDAvUVJiWDRaRkxiYy9EcTFCUT09>
Meeting ID: 899 1302 6393
Passcode: 817075
Dial-In: +1 312 626 6799

1. **Call to order** 1 min
2. **Approval of minutes from last meeting** 2 min
3. **Additions to the Agenda**   1 min
4. **Old Business**
	1. None
5. **New Business**
	1. Polaris 7.4 Recommendations (ACTION) 20 min
		1. Calculate renewals based on due date
		2. Cancel holds in Held status
		3. Combined Picklist holds view
		4. Opting out of patron self-registration duplication detection
	2. Guidelines for Manual Item Recovery (DISCUSSION) 30 min

**Adjournment**

All matters on the agenda may be discussed, amended, and acted upon

# **5a. Polaris 7.4 Recommendations**

**Calculate Renewals Based on Due Date**
A new renewal-related setting allows sites to re-configure how Polaris calculates due dates for manual renewals. Currently, renewals are calculated based on the date of renewal. The new setting allows a site to calculate renewals based on the item due date.

**Example of a Renewal Configurations for a 3-Week Item**

|  |  |  |  |
| --- | --- | --- | --- |
| **Configuration** | **Item Original Due Date** | **Patron Renews On** | **Item’s New Due Date** |
| Based on renewal date | July 1 | June 17 | July 8 |
| Based on due date | July 1 | June 17 | July 22 |

*Does renewal calculation based on due date impact auto-renew?*

This setting would not apply to automatic renewals. Due dates for auto-renewals are always calculated by adding the loan period to the due date.

*What if staff renew an overdue item when renewal calculation is based on due date?*

The new due date will be calculated from the date of renewal; renewal calculation based on due date will only be applied if the item is not yet overdue.

*What happens if the patron renews an item multiple times in a row?*

Each renewal will build on the current due date. For example, a patron renews a 3-week item that is due on July 1 two times in a row. The first renewal changes the due date to July 22. The second renewal changes the due date to August 12.

**CCS Recommendation:** Do not enable renewal calculation based on due date. Continue to calculate renewals based on renewal date.

### **ACTION**

**Motion to continue to calculate renewals based on the renewal date.**

**Canceling Holds in Held Status**
At this time, staff and patrons can cancel only certain types of holds in Leap or the PowerPAC. This includes holds with a status of Requested, Paused, Locating, or Shipped. If a request is in Held status (Ready-for-Pickup), staff can only cancel the hold by checking the held item in. The patron is not able to cancel a Held request from the PowerPAC.

A new Polaris setting allows patrons and staff to cancel a Held holds in the PowerPAC or Leap.



*Cancel Held hold in Leap*



*Cancel Held hold in PowerPAC*

Any Held holds that are canceled are added to the Picklist under a “Canceled” view or a “Holds to Action” view, depending on settings. This allows staff to identify canceled holds that need to be pulled from the hold shelf and checked in.



*Identifying canceled Held holds*

*How long will the hold appear in the Picklist Canceled view?*

The hold will display in the Picklist Canceled view until the item is checked in by staff. Once it’s checked in, its circulation status is updated.

*Can patrons or staff cancel holds with a status of Located?*

No, Polaris does not give patrons or staff the ability to cancel holds with a status of “Located.”

**CCS Recommendation:** Enable staff and patrons to cancel hold requests in Held status.

### **ACTION**

**Motion to enable staff and patrons to cancel hold requests in Held status.**

## **Combined Picklist Holds View**

The Leap Picklist organizes holds to pull based on hold status, which includes Unclaimed intra-CCS holds and unclaimed ILL, Ready for Pickup holds that need to be transferred to a new pickup location, and (as of 7.4) Canceled holds. For each of these tabs, staff are expected to pull the hold from the hold shelf and check the item in.



*Default Picklist tab view*

A new Picklist setting enables a combined view, where Unclaimed intra-CCS holds, Holds to Transfer, and Canceled holds are all listed together under a “Holds to Action” tab. This setting is optional.



*Combined Picklist “Holds to Action” view*

*Will staff still know the condition of the hold?*

Yes, the combined picklist view includes a “Type” column which will list if the hold is unclaimed, canceled, or is a transfer.



**CCS Recommendation:** Enable the combined Picklist holds view.

### **ACTION**

**Motion to enable the combined Picklist holds view.**

**Opting Out of Patron Self-Registration Duplication Detection**
Polaris offers patron self-registration through the PowerPAC. This service is optional. 11 CCS libraries currently offer this self-registration option. When a patron registers, they are issued a temporary barcode and, depending on library settings, can place holds or access eContent. The patron needs to verify their identity with the library and receive a permanent library card number in order to check out physical materials.

By default, Polaris performs a duplicate patron check to see if the patron has an existing record in the database. Duplicate check data points include the last name, first name, birthdate, and email address. If Polaris detects a duplicate record, it will not issue a temporary card number to the patron and direct them to contact the library.

A new setting allows libraries to deactivate the duplicate detection when patrons self-register. This setting can be configured at the system level to apply to all libraries, or at a branch level. If deactivated, the PowerPAC will issue a temporary barcode regardless of if a duplicate patron record is identified.

*What is the benefit of keeping self-registration duplication detection active?*

* Maintains data integrity - Patrons with existing library records (including blocked records) do not end up with duplicate accounts.

*What is the benefit of deactivating self-registration duplication detection?*

* Patron access - Patrons who are unsure or unaware they have an existing account can register online, place holds, and potentially access econtent without library intervention.

**CCS Recommendation:** Keep patron self-registration duplication detection active.

### **ACTION**

**Motion to keep patron self-registration duplication detection active.**

# **5b. Guidelines for Manual Item Recovery**

## Background

Some CCS libraires manually reach out to patrons with Lost items to encourage item recovery. These efforts are in addtion to the Polaris automatic bill notice at 45 days overdue. At this time, there are no system-wide guidelines around manual item recovery. CCS is interested in determining if there is a need (or not a need) for guidelines on who a library contacts during manual item recovery.

For example:

* A library can manually contact patrons where they are the transacting library
* A library can manually contact patrons where they are the transacting library and owner of the Lost item
* A library can manually contact patrons registered to their library, regardless of transaction library

One consideration are the policies and rules the patron is subject to. While many of our settings and policies are tied to the transaction library, such as overdue/bill notices and circulation rules, eligibility for collections is dictated by the patron’s home library. Patrons registered to a library that participates in collectioins are eligible to be submitted to collections regardless of where they checked out.

## Example Manual Item Recovery Workflows

* After an item becomes Lost, the library contacts the patron to remind them about the item and that charges will be removed if item is returned in good condition. The library follows-up with paper invoice. If item is not returned after 30 days, the library follows up with a second invoice.
* After an item becomes Lost, the library contacts local patrons who have a bill for a local item. As a collections library, they also contact local patrons who are eligible for collections, regardless of item owning library. After initial contact, the library sends a follow-up a couple weeks later. The patron may be contacted up to three times each round: once by email, once by phone, and once by mail.
* After an item becomes Lost, the library contact patrons who checked out at their location, both local patrons and reciprocal borrowers. The library will contact the patron via email up to two times within the first two months of the item becoming Lost.

## **Discussion**

Goal: Determine if there should or should not be guidelines on who is notified by a library during manaul item recovery.

1. What questions do you have about manual item recovery?
2. How would you address situations where there is possibility of overlap (for example, a patron from a collections library checks out as a reciprocal borrower at a different library)?
3. How would manual recovery look if more libraries adopted this practice?
4. What are your thoughts on setting guidelines? On not setting guidelines?
5. What information would help you make a recommendation?