**Notes**

**CCS Circulation Technical Group**

**Live via Zoom**

**Friday April 14, 2023**

**9:32am – 10:50am**

1. Call to order 9:32 am
2. Approval of minutes from last meeting - Approved
3. Additions to agenda - None
4. Officer reports
	1. Chair – Keri Carroll Duk- None
	2. Vice Chair – Athena Crouse Nik- None
	3. Secretary – Tori Sergel Lfk - None
5. CCS staff reports
	1. Updates from M. Fujiura-Landers **(2min in)**
	2. Updates: Warren Newport migration to Polaris – Offline to load and go live will be around Labor Day weekend to coincide with library holiday/closed days
	3. Monday April 17 loading Warren Newport onto training database take until April 28, 2023
	4. CCS will review Offline procedures for down time in September to load Warren Newport:
	5. Offline July circ tech / and usual offline webinar
	6. New member news: Mount Prospect membership approved. Will be joining in 2024 Fall (Mt Prospect makes 30! CCS libraries)
	7. Manually contacting patrons on lost items: want to take to Circ/ILL advisory groups for guidelines Meiko would like any workflow processes you may have before the end of May to share for consideration on procedures
	8. NOCOA April 18th drop in at CCS Q&A
	9. Unique decrease to 1cent per record
	10. Circ dept Distribution list: thanks for sending information had to put on hold for a bit, soon
6. Old Business – None **(7:15 min)**
7. New Business:
	1. Time to vote:
		1. Vice Chair Athena moves to Chair
		2. Dana Jenkins Dpk Vice Chair (Kim 1st, Michelle 2nd)
		3. Anastasia Rachmaciej Prk Secretary (Tori 1st, Paula 2nd)
		4. Thank you both!!!!!
	2. FY23-24 Meeting Updates: **(14 min)**
		1. July 2023 Virtual
		2. October 2023 In person
		3. January 2024 Virtual
		4. April 2024 In person
			1. CCS new Lincolnshire offices will host In-person meetings (June 1 is start to move in date)
			2. 200 Tri-State International Lincolnshire, IL 60069
	3. Patron Note Fields **(17:45 min)**
		1. Character limit: 4,000 characters applies to both fields (currently only 30 with notes over 3,000)
		2. But we should be aware of this – remove old notes when resolved, clean up old notes see Legacy Patron notes, avoid lots of spaces, returns and lists – they take up space
	4. Circulation Report Guidelines **(22 min)**
		1. Common questions: what reports to use and how frequently
		2. There is no single report on reports and when they need to be reviewed. Generally found in How to sections on items related to the reports
		3. Guidelines shows main information on reports and includes how often to view and how to links
		4. All daily reports (Daily defined as: mon-fri) are being done and/or are in governing board policy
		5. Weekly –
			1. InTransit and Status Claims are shelf check reports
			2. Library/Code/RBP/Prefix Mismatch report: shows errors to clean up to keep holds moving correctly, stats, and some online resource access
		6. Undeliverable Notice - errors to monitor for spikes
		7. Monthly –
			1. Clean up reports – most tied to notices
		8. Suggested Reports
			1. Not reports expected to use but could help point you in a direction if you are looking for different information
		9. Questions? **(28 min)**
			1. Can we revisit if needed after approval? Yes
			2. Daily shelf check – who uses and how frequently (see chat link under link of meeting https://www.youtube.com/watch?v=Ci31JouYFl4)
			3. Weekly more the concern – to what degree would there be issues if we are pressed and cannot get to it?
			4. We understand but if you can get to them when there is time it is helpful – other actions may not be able to be taken if you haven’t moved it along
			5. Examples given:
				1. Unclaimed items are helpful to move along as they are other libraries materials – check with library after 14 days
				2. In transit needs to have action as it may be a hold for someone
			6. Motion to approve as written – Approved
				1. Tori Sergel Lfk So move
				2. Ann Thomas Phk 2nd
			7. CCS will update manual and post on website
	5. OLD HOLDS report – K Carroll – how do others use this report?
		1. Paula Pavelski Zik uses old holds report – items sometimes found or reorder other ways
		2. Tori Sergel Lfk – we try to review monthly and try and make good dent
	6. FAILED NOTICES email tracking **(48 min)** – K Carroll – Seen any patterns, what are you receiving?
		1. Why does it still show failure when I have reviewed and cancelled text notification?
		2. All Verizon users for Keri Duk
		3. Ann Phk often new carrier
		4. Tori Lfk also not getting txt but email was coming – often change of carrier
		5. Donna Wgk ours mostly failed emails, but when we reply they work, patrons are replying to us when we send response
		6. Kim Wlk sometimes a older email listed, also carrier change issues
		7. Mieko – All they can do is see that it was successfully sent. Some may get the notice later, bounces once then goes through later
		8. NOTE Consumer Cellular patrons needs to contact the company to find out their carrier, they piggyback onto others
		9. **Solution for Patrons who don’t know their carrier: Have patron txt your notices email and you will be able to see their carrier**
		10. Why does carrier matter? they start as email address and need to be converted into text format and each carrier does it differently, CCS needs to know carrier to format properly
		11. Why is there Unspecified under Carrier – Mieko will check on that
		12. When reports/notices don’t run correctly they are considered failures so are not sent out
		13. Note: if notification option selected in Main = Text AND Additional is also Text it will not work properly
		14. Unique: email for email domains – get a blank notice saying emails will be sent from the server – just a notice that we will be pushing out notices. Kim Wlk Standard that gets sent out first and then it is closed.
		15. Donna Wgk notices not printing the way they should
	7. License Plate Renewals- Anastasia Prk **(1:04:30)**
		1. Ann Phk – Started doing this beginning of new year. Patrons like it – done 6. There are lower income people who can register for lower price on stickers. Hard to make a mistake. Lots of staff training and they are still a little nervous. Uses ELS – happy with them – very responsive
		2. She has power point presentation on how to. Uses square to pay.
		3. Keri Duk – Uses SSLT. Same – very hard to make mistake. Biggest issue was setting up way to accept payment. Average 1 a day. Doing since December 2019
		4. Donna: What do you do if they need new plates? Ann phk - Will print a temporary sticker
		5. Ann concerned that someone had seen tag scratched when pressing tag on. Keri has not had that issue
		6. Apisara Alk – Also have S&S, started last year a little over 100 so far. Had some issues with getting it properly aligned in the margin and had to reprint
		7. Creating a dedicated printer is helpful
8. Library announcements **(1:14:00)**
	1. Kris Zik April 24 Begins construction refresh – so hours open and closed may vary
	2. Tori Lfk New director starting May 1 Ishwar Laxminarayan
	3. Jian Rlk Circulation assistant at Round Lake
	4. Kim Wlk opened 24/7 lockers (39) attached to outside building – can be a hot spot for wifi
	5. Algonquin Belinda moving to administration, Gary retired, Apisara is the new circulation coordinator WELCOME
	6. **Next meeting Friday July 14 9:30 Zoom**
9. Adjournment: 10:50am
	1. Tori Lfk Motion to ajourn
	2. Ann Phk 2nd

**Circulation Technical Group: Meeting Sign In**
**April 14, 2023**

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| **Library**  | **Name(s)**  |
| Algonquin  | Apisara Houltram  |
| Cary  | Cheryl Allen  |
| Crystal Lake  |   |
| Des Plaines  | Michelle Meyer-Edley, Dana Jenkins  |
| Ela  | Laurie White  |
| Evanston  | Ben Heet    Gabriela Mansera  |
| Fox River Valley  | Keri Carroll  |
| Fremont  | Karen Bolton  |
| Glencoe  |   |
| Glenview  |   |
| Grayslake  | Gwen Johnson, Shannon Sheedlo, Meredith Bernhardt  |
| Highland Park  |   |
| Huntley  |   |
| Indian Trails  | Rosa Lloyd, Donna Ramirez  |
| Lake Forest  | Tori Sergel  |
| Lake Villa  | Rachel Quan  |
| Lincolnwood  | Stephanie Haugan  |
| McHenry  |   |
| Morton Grove  | Jeffrey Ray  |
| Niles-Maine  | Athena Crouse  |
| Northbrook  |   |
| Palatine  | Jennifer Sobel, Karen Bollman, Rosalie Scarpelli  |
| Park Ridge  | Anastasia Rachmaciej  |
| Prospect Heights  | Ann M. Thomas  |
| Round Lake  | Alisha Smaby, Jian Rao  |
| Warren-Newport  |   |
| Wilmette  | Kim Hegelund  |
| Winnetka-Northfield  | Kathryn Freemond  |
| Zion-Benton  | Paula Pavelski , Kris Nichols  |
| CCS  | Mieko Fujiura-Landers  |
| Other  |   |