# **Circulation/ILL Advisory Group**

# **Agenda – September 15, 2023**

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

Meeting Access Information:  
URL: <https://us02web.zoom.us/j/83750068908?pwd=M1JyeGFCSDVFRWRvUXB0UTJTL3BzUT09>   
Meeting ID: 837 5006 8908  
Passcode: 742868  
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. Overview of Circulation/ILL Advisory Group (PRESENTATION) 5 min
   2. Manual Item Recovery in CCS Libraries (ACTION) 15 min
   3. Patron Record Single Name Only 20 min
      1. Enabling single name only for ILL for Cooperative Computer Services branch (ACTION)
      2. Enabling single name only for all other CCS libraries (ACTION)
   4. MessageBee Automated Non-Blocking Note for Bounces (ACTION) 10 min

**Adjournment**

**Next meeting will be held December 15, 2023 via Zoom**

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

5a. Overview of Circulation/ILL Advisory Group

 Advisory Group Member Job Description

Advisory groups consult with CCS on potential system configuration changes, assist with research and testing, and recommend policy changes and best practices to their associated technical groups.

Advisory group members are expected to:

1. Use their expertise and knowledge to represent the CCS community
2. Participate in 4 advisory group meetings per year
3. Participate in 4 associated technical group meetings per year
4. Engage in online, asynchronous conversation and research between meetings
5. Work with CCS staff to present findings and recommendations as needed.   
     
   Interested staff can self-nominate, or directors can nominate on behalf of their library. All participants must have director approval.

## Decision Matrix for ILS Setting or Procedure Changes

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Governing**  **Board** | **Technical Group** | **CCS Staff** | **Advisory Group** |
| 1. No change to workflow AND 2. No financial or HR impact | Informed | Informed | Approve | Recommend |
| 1. Change to workflow AND 2. No financial or HR impact | Informed | Approve |  | Recommend |
| 1. Financial or HR Impact OR 2. Addition of service OR 3. Policy change | Approve | Recommend |  | Recommend |

Specific responsibilities for this advisory group are outlined below.

## Circulation/ILL

7 Members

The Circulation and Interlibrary Loan Advisory Group partners with CCS staff to refine documentation, consults with CCS staff on configuration changes, researches and recommend policy and best practice changes to the Circulation and Interlibrary Loan Technical Groups. CCS Staff Liaison: Member Services Librarian, Public Services

## 2023-2024 Circulation/ILL Advisory Group Meeting Dates

All meetings will be held virtually via Zoom

* September 15, 2023 (9:30-11:30)
* December 15, 2023 (9:30-11:30)
* March 8, 2024 (9:30-11:30)
* June 14, 2024 (9:30-11:30)

# 5b. Manual Item Recovery in CCS Libraries

## Background

Some CCS libraires manually reach out to patrons with Lost items to encourage item recovery. These efforts are in addition to the Polaris automatic bill notice at 45 days overdue. At this time, there are no system-wide guidelines around manual item recovery.

A number of CCS circulation rules are based on the transaction library, such as material type limits, fines, loan periods, and overdue/bill notices. However, patrons are referred to Unique Collections by their home library, regardless of where they checked out. 15 out of 29 CCS libraries participate in Unique Collections. The home library sets fee threshold and age to quality for referral and those values differ from library to library.

CCS is aware of a few libraries involved in manual item recovery. The process varies by library and workflows include:

* The library contacts patrons who checked out from their location, regardless of patron home library
* The library contacts patrons registered to their library, regardless of where the patron checked out
* The library contacts both patrons registered to their library and patrons who checked out from their location

Several questions and situations related to manual item recovery have been brought to CCS, where there was confusion from both patron and library staff. This tends to occur during reciprocal borrowing situations where the patron transacted at a different library than their home library.

The Circulation/ILL Advisory Group discussed manual item recovery efforts at their June 2023 meeting. General consensus was that it would be beneficial to have guidelines on who libraries can contact during manual item recovery. The initial preference would be to contact patrons who checked out at your library.

CCS then took this topic and recommendation to the July Executive Committee meeting. After a discussion, the Executive Committee agreed that guidelines would be helpful for libraries that wish to send additional notices regarding lost items. They determined that libraries should only contact their patrons, not patrons from other libraries, in order to stay consistent with collections submission.

Based on Executive Committee direction, CCS drafted the below guidelines for manual item recovery:

Draft Guidelines  
**Polaris will issue an automated bill notice when an item reaches 45 days overdue. If a library intends to manually contact patrons over billed items in addition to automated notices, efforts should be limited to patrons registered to their library or non-CCS reciprocal borrowers who checked out from their location. The library should not contact patrons registered to another CCS library.**

Additional question for discussion:

* What information would be helpful to have in a report so that libraries could properly identify patrons to be contacted?

### **ACTION**

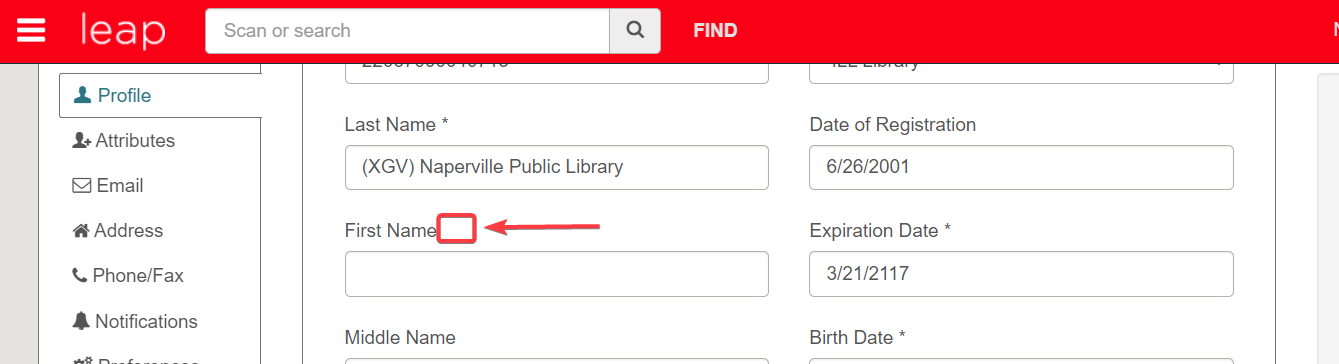
**Motion to accept drafted guidelines for manual item recovery.**

# 5c. Patron Record Single Name Only

## Background

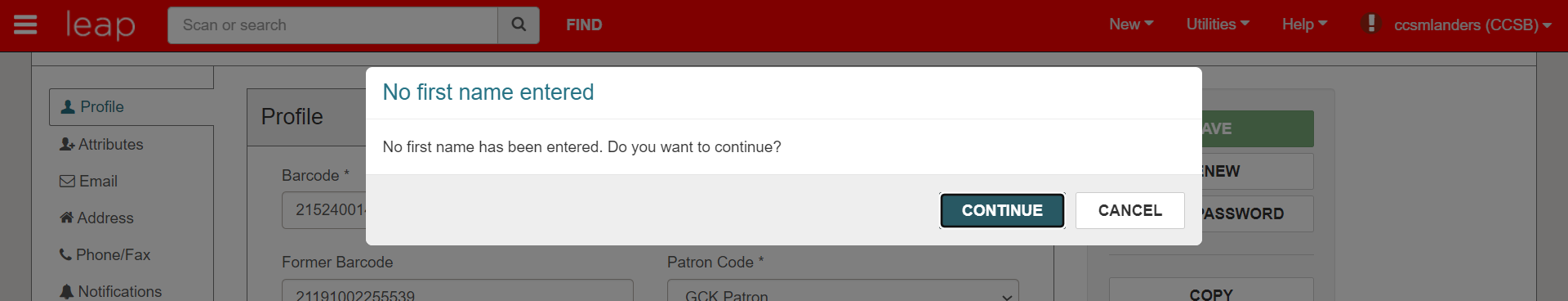
By default, Polaris requires both a first name and a last name to save a patron record. People are required to have both a first and last name on file, even if from a mononym culture. Institutions, such as businesses and schools, may have their name divided between the first name field and the last name field or use filler characters for one of the fields.

A new setting in Polaris gives the option to only require a last name field. If enabled, staff will be able to save a patron record without entering a first name.



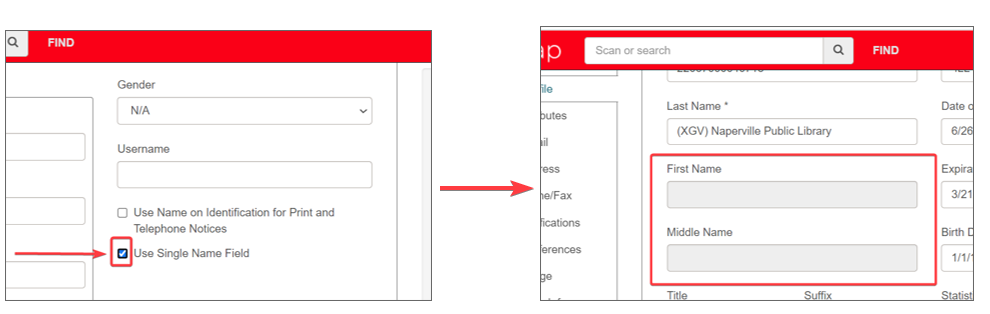
*First name not required*

When a record without data in the first name field is saved, Leap will display an alert for verification.



*No first name entered alert*

Optionally, staff can select a “Use Single Name Field” checkbox in the patron registration workform. When selected, Leap will disable the first name and middle name fields. This serves as an indicator that using a last name only was an intentional decision. If “Use Single Name Field” is checked, the “No first name entered” pop-up will *not* appear when the record is saved.



*Use Single Name Field checkbox*

As of Polaris 7.4, the patron Last Name Field can now hold up to 100 characters in order to support longer names. This opens the possibility of entering a single name for institutions, such as ILL Library accounts.

This setting can be enabled by branch. If enabled, we would either enable system-wide or enable just for the ILL for Cooperative Computer Services branch.

Searching and Reports:

* **The Quick Search Box**   
  The Leap Quick Search Box will search for first name, middle name, last name, first-middle-last name, or last-first-middle name. Staff will be able to search for patrons that only use a last name.
* **The Leap Find Tool**  
  When searching using the Leap Find Tool, staff can choose to search All keyword fields, Name (Last, first middle), or Name (First middle last) to locate patrons that only use a last name.
* **Reports**  
  When generating a Simply Report, Web Report, or Staff Client report, patron last name data will appear in patron last name or patron full name output. Staff will not see data in first name only output if a patron only uses a last name.

## Enabling Single Name Only for the ILL for Cooperative Computer Services Branch

Non-CCS libraries may have a patron record in the CCS database. These libraries have a Registered At branch of ILL for Cooperative Computer Services (CCSILL). Some libraries will check outgoing interlibrary loan items out to these patron accounts.

Since use of both first name and last name fields are required, staff need to split an institution’s name into two fields. The [ILL Library Accounts](https://www.ccslib.org/training/ill-library-accounts) how-to website page details the current convention for entering an ILL library name. For public libraries, the current convention is to enter the library’s delivery code into the first name field and the institution name into the last name field. For academic libraries, the current convention is to enter the library’s delivery code into the first name field, the library’s name into the middle name field, and the university's name into the last name field.

As of September 7, 2023, there are 3,017 ILL for Cooperative Computer Services patron records in the database. If the option for Single Name Only is activated for the ILL for Cooperative Computer Services branch, CCS would bulk prepend the first name field in records to the last name field.

**Example:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **First Name** | **Middle Name** | **Last Name** |  | **Single Name Only** |
| (XGV) |  | Naperville Public Library |  | (XGV) Naperville Public Library |
| (NWU) | Pritzker Legal Research Center | Northwestern University |  | (NWU) Pritzker Legal Research Center Northwestern University |
| (EIU) | Booth Library | Eastern Illinois University |  | (EIU) Booth Library Eastern Illinois University |

Test searching for and viewing the above example libraries in [training Leap](https://ccs-training.polarislibrary.com/LeapWebApp) and consider the following questions:

1. What is your experience like searching for single name only records? Is it easier than records with conventional names, more difficult, or no difference?
2. Do you experience any difference viewing the records?
3. Would there be a benefit to enabling single name only for the ILL for Cooperative Computer Services branch?
4. Would there be a benefit to keeping required first and last name fields for the ILL for Cooperative Computer Services branch?

### **ACTION**

**Motion to enable single name only for the ILL for Cooperative Computer Services branch.**

## Enabling Single Name Only for All Other CCS Libraries

In addition to the ILL for Cooperative Computer Services branch, the single name only setting can also be enabled for all other CCS branches. If enabled, we would enable for all CCS library branches to adhere to a consistent patron experience.

Libraries may currently employ different practices for inputting mononym and institutional names. A global update to single field names would not be viable. CCS would work individually with libraries to determine options for bulk updates to name fields.

Questions for discussion:

1. Would there be a benefit to enabling single name only for all other CCS libraries?
2. Would there be a benefit to keeping required first and last name fields for all other CCS libraries?
3. If enabled, should staff be required to use the “Use Single Name Field” checkbox for patrons with a single name only?

### **ACTION**

**Motion to enable single name only for all other CCS libraries.**

# 5d. MessageBee Automated Non-Blocking Note for Bounces

## Background

CCS libraries began using Unique’s MessageBee text messaging services in August 2023. MessageBee will track bounced notices. Staff can view bounces through the MessageBee portal or by setting up an emailed report.

CCS libraries have [undeliverable message procedures](https://www.ccslib.org/training/managing-undeliverable-notices#Procedures-for-Managing-Undeliverable-Text-Message-Notices), including bounced text notices. These procedures include adjusting the patron’s notice preference to email or phone and adding a non-blocking note.

MessageBee supports an option to add a non-blocking note to the patron’s record if it detects a bounced message. The non-blocking note text would say:

*“[DATE] – Notification to [###-###-####] bounced."*

The message text cannot be customized. MessageBee would like direction on if this option should be activated.

Questions for discussion:

* Would automatically adding a non-blocking note benefit staff?
* Would there be benefits to manually adding a non-blocking note?

### **ACTION**

**Motion to enable the MessageBee non-blocking note.**