# **Circulation/ILL Advisory Group Minutes**

June 9, 2023

**Attendees:** Bob Bigden-Russell (ZIK); Kim Hegelund (NBK); Belinda Husak (ALK); Rachel Quan (LVK); Alisha Smaby (RLK)

**Absent:** Ann Marie Thomas (PHK); Courtney Volny (WNK)

**Also Present:** Mieko Fujiura-Landers (CCS); Michelle Meyer-Edley (DPK)

The June 9, 2023 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 December 9, 2022 Circulation/ILL Advisory Group meeting. Minutes accepted as submitted.

There were no additions to the agenda.

## 1. Polaris 7.4 Recommendations

The Advisory Group looked at new settings and features that will be available with the 7.4 Polaris upgrade and made recommendations to accept or reject.

### Calculate Renewals Based on Due Date

One new setting changes how due dates are calculated at renewal. Currently, renewals calculate due dates from the renewal date. The new setting will calculate due dates from the item’s current due date. Committee members thought this method could be confusing for patrons and staff since practice up to this point has been that renewals extend from renewal date. There was also concern that users would be able to renew an item multiple times in a row and extend the due date out to a point that may impact holds, purchasing, or statistics. The new setting would allow both staff and patrons using the PowerPAC to renew from the item’s current due date.

K. Hegelund (NBK) moved and R. Quan (LVK) seconded to recommend continuing to calculate renewals based on the renewal date.

**Ayes:** B. Bigden-Russell (ZIK); K. Hegelund (NBK); B. Husak (ALK); R. Quan (LVK); A. Smaby (RLK))
**Nays:** None

The motion passed. M. Fujiura-Landers (CCS) will take the recommendation back to CCS.

### Canceling Holds in Held Status

The second 7.4 feature discussed was a new setting that allows patrons and staff to cancel Held holds in the PowerPAC or Leap. The hold is then added to a Holds to Action/Canceled hold tab, so staff know to pull the hold.

Committee members asked the following questions: if the PowerPAC displays a warning before confirming cancelation? Yes, patrons will see a warning and prompt to confirm the hold cancelation. When a held hold is canceled, will the item automatically trap for the next patron? The hold will not attach itself to the next patron until the item is formally checked in by staff. What status does the patron see in the PowerPAC once the hold is canceled? The PowerPAC will show the hold as “Canceled” so the patron has visual that the hold is now unavailable. Will the canceled holds appear in the Daily Clean Hold Shelf Web Report? Mieko will confirm with R. Barth. Committee members noted that patrons and staff will not be able to cancel holds with a status of “Located.” The group briefly discussed workflow with “Located” status and the impact of not having the ability to cancel the hold. How does this setting impact out-of-system ILL requests? Patrons will still not be able to cancel out-of-system ILL requests; the new setting only applies to intra-CCS requests.

B. Bigden-Russell (ZIK) moved and B. Husak (ALK) seconded to recommend enabling the setting to allow staff and patrons to cancel hold requests in Held status.

**Ayes:** B. Bigden-Russell (ZIK); K. Hegelund (NBK); B. Husak (ALK); R. Quan (LVK); A. Smaby (RLK))
**Nays:** None

The motion passed. M. Fujiura-Landers (CCS) will take the recommendation to the next Circulation Technical Group meeting for formal approval.

### Combined Picklist View

The Leap Picklist by default has separate tabs of holds to pull, sorted by the pull condition (unclaimed, canceled, holds to transfer). A new 7.4 setting can combine these views into a single “Holds to Action” tab.

Committee members were in agreement that having fewer places to look for holds to pull would be beneficial for staff.

R. Quan (LVK) moved and A. Smaby (RLK) seconded to recommend enabling the setting for the combined Picklist holds view.

**Ayes:** B. Bigden-Russell (ZIK); K. Hegelund (NBK); B. Husak (ALK); R. Quan (LVK); A. Smaby (RLK))
**Nays:** None

The motion passed. M. Fujiura-Landers (CCS) will take the recommendation back to CCS.

### Opting Out of Patron Self-Registration Duplication Detection

Polaris offers an optional self-registration option through the PowerPAC. By default, Polaris will perform a duplicate patron check on users who self-register. It will stop the registration process if it detects a dupe. A new 7.4 setting allows libraries to deactivate the duplicate patron check. Any user who self-registers will receive a temporary barcode that may allow access to econtent or placing holds (depending on library settings).

Committee members expressed that they do not see a benefit to deactivating the duplicate patron check. A committee member who previously worked at libraries that offered PAC self-registration said that the duplicate patron message prompted users to contact the library, allowing staff to assess the situation and circumvent issues. A committee member from a library that currently offers PAC self-registration mentioned they find users who live outside of the district will keep trying to register for a card online and the duplicate patron check can help prevent multiple registration attempts. Is self-registration separate from a virtual card application? Yes, the self-registration option impacts just self-registration through the PowerPAC. It will not impact online registration a library may offer through their website.

A. Smaby (RLK) moved and K. Hegelund (NBK) seconded to recommend keeping the patron self- registration duplication detection active.

**Ayes:** B. Bigden-Russell (ZIK); K. Hegelund (NBK); B. Husak (ALK); R. Quan (LVK); A. Smaby (RLK))
**Nays:** None

The motion passed. M. Fujiura-Landers (CCS) will take the recommendation to the next Circulation Technical Group meeting for formal approval.

## 2. Guidelines for Manual Item Recovery

Some CCS libraries manually reach out to patrons with Lost items to encourage item recovery. These efforts are in addition to the Polaris automatic bill notice. At this time, there are no system-wide guidelines around manual item recovery. M. Meyer-Edley (DPK) gave an overview of Des Plaines’ manual recovery process.

The committee discussed contacting patrons. Most circulation policies are based on the transaction library, and it makes sense to apply the same logic to manual item recovery. There could be confusion if patrons receive communication from a library they did not check out from. M. Fujiura-Landers (CCS) clarified rules around collection agency setup and that users are submitted by their home library. She asked if the group had a preference for manually contacting patrons who checked out at your library or patrons who are registered to your library? The committee preferred contacting users who checked out at your library because it is consistent with other circulation policies. It would also be less confusing for the patron in terms of why this library is contacting them and where they should return the items.

Round Lake and Lake Villa are collections libraries, and both issue a letter to eligible patrons before they are submitted to collections. The Polaris fine notice can be a way to reach out to your patrons who don’t check out at your library.

M. Fujiura-Landers (CCS) asked if there is a need at this time to set guidelines around contacting patrons for manual item recovery. The committee felt it would be beneficial to set guidelines for consistency. Some libraries have already had confusing situations for both patron and staff with manual item recovery. It would also help to establish guidelines now before more libraries start adapting this practice. The suggestion is that communication comes from the transaction library. Libraries can also reach out to the patron’s home library if the situation involves excessive fees.

M. Fujiura-Landers (CCS) will take this discussion back to CCS.

B. Bigden-Russell (ZIK) moved and K. Hegelund (NBK) seconded to adjourn the meeting. The meeting was adjourned at 10:52 am.

## **Summary of Next Steps**

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| **Who** | **What** | **When** |
| CCS | Investigate changes to Daily Clean Hold Shelf Web Report | June 2023 |
| CCS | Consider committee recommendations on 7.4 renewal calculation setting and self-registration duplicate patron detection setting | June/July 2023 |
| CCS | Consider committee discussion around manual item recovery guidelines | June/July 2023 |
| CCS | Bring committee recommendations on 7.4 cancel held holds setting and combined picklist view settings to the July Circulation Technical Group meeting for formal approval | July 2023 |