**Minutes**

**CCS Circulation Technical Group**

**In Person-CCS OFFICE**

**100 Tri-State International Drive, Suite 122, Lincolnshire, IL 60069**

**Friday, October 13, 2023**

**9:36 a.m-. 10:42 a.m.**

**Attendees**

Apisara, Houltram (Algonquin), Belinda Husak (Algonquin), Cheryl Allen (Cary), John Lavalie (Des Plaines), Gabriela Mansera (Evanston), Keri Carroll (Fox River Valley), Karen Bolton (Fremont), Danny Burdett (Glencoe), Meredith Bernhardt (Grayslake), Jana Crabtree (Grayslake), Danny Quinlan (Highland Park), Donna Ramirez (Indian Trails), Rosa Lloyd (Indian Trails), Tori Sergel (Lake Forest), Choosri Goebel (Lake Forest), Sephanie Haugan (Lincolnwood), Brent Michalski (McHenry), Jeffrey Ray (Morton Grove), Athena Crouse (Niles-Maine), Donna Beach (Northbrook), Rosalie Scarpelli (Palatine), Jennifer Sobel (Palatine), Anastasia Rachmaciej (Park Ridge), Ann Thomas (Prospect Heights), Alisha Smaby (Round Lake), Matthew Hoffman (Wilmette), Mieko Fujiura-Landers (CCS), Debra Wischmeyer (CCS)

**Chair Athena Crouse (NIK) called the meeting to order at 9:36 a.m.**

**Approval of minutes from the July CCS Circulation Technical Group Meeting**

Karen Bolton (Fremont) made a

**Motion:** to approve the minutes of the July 14, 2023 Circulation Technical Group Meeting

Keri Carroll (Fox River Valley) seconded the motion

**Motion passed**

**Additions to the agenda**

* Attributes on patron records in Polaris- Karen Bolton (Fremont)
* Bedbugs in ILL delivery bins- Alisha Smaby (Round Lake)

**Officer reports**

Chair: Athena Crouse (NIK) none

Vice Chair: Dana Jenkins (DPK) absent

Secretary: Anastasia Rachmaciej (PRK) none

**CCS staff reports**

**Updates from M. Fujiura-Landers**

1. The Circulation department distribution list project was postponed due to the Warren- Newport migration. Once the distribution list is created, Mieko will notify the listserv for testing. A test email will be sent and once everyone confirms they received the email, CCS will notify the group that the listserv is ready for use.
2. If a damaged item is returned to you and belongs to another library and you are not sure about the damage, please reach out to the other library and send a picture of the damage to keep the library informed.

**Updates from D. Wischmeyer**

1. Next week on Thursday, October 19 CCS is hosting a find more Illinois webinar for all members. RAILS staff will also be in attendance to answer questions on how Find More IL works.
2. MessageBee migration was successful. There is one final outstanding issue regarding auto-renewal notices sending out duplicates because Polaris and MessageBee are currently both sending text reminders. CCS is working with Polaris to disable Polaris text (autorenewal notices). An update will be shared in two weeks in the CCS newsletter, more to come.
3. At the November Governing Board meeting the board will be voting on approving Waukegan Public Library joining CCS. CCS is very excited to be adding two more libraries to the consortium in the future (Waukegan and Mt. Prospect).

**Old Business**

**None**

**New Business**

**Picklist Processing Web Report- Do staff use the Holds added and Holds Processed tabs? (DISCUSSION)**

The Picklist processing reports on web reports was updated during COVID to include more data fields. This report currently runs at 9 p.m. daily to update holds processed and holds added from the day before. These two tabs were added during COVID when library staff were gathering different data on services. Now that we are in a more normal operations, CCS wanted to check-in with libraries to see if this is still being used. If not then we can remove these tabs and have the report run earlier in the morning.

Mieko asked the group who if anyone is still using these data points for statistics. The consensus was that no present libraries were using this data and it would be removed from the report. Mieko will send an email to the ILL list serve as a final call and then move forward with modifying the report

**Manual Item Recovery Guidelines (PRESENTATION)**

Several 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 45 days overdue. The Circulation/ILL Advisory Group recognized there may be a need for guidelines at their June meeting. The Executive Committee also agreed we should have guidelines and that guidelines should be consistent with how patrons are submitted to Collections.

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.

Next steps are that CCS developed a standardized web report that follows guidelines: **Patrons with an Account Balance for Replacement Cost** and the Circulation Manual will be updated to include guidelines. These new guidelines are effective November 1, 2023.

**Recommendation to enable patron record single name only setting in Polaris (DISCUSSION with ACTION)**

A new setting came with the most recent ILS update regarding single name only. This new feature would be beneficial for institution/organization/business cards and patrons with mononym names.

Current: Polaris requires both a First Name and Last Name in patron record

New Option: Last Name is only required field; First Name is optional

If enabled some things to keep in mind is that last name field now supports up to 100 characters, searching in both Quick Search Box and Find Tool will not change and single names will appear in Last Name field in reports.

If activated, staff are asked to only use for mononym names.

Current Practice: Libraries may currently employ different practices for inputting mononyms and institutional names.

If enabled: Libraries could choose to use a single name for a patron record if appropriate.

Open a help ticket with ccs if you would like to cleanup a group of users

Next week CCS will update relevant pages and will go live Monday, October 23

Anastasia Rachmaciej (Park Ridge) made a

**Motion:** to enable patron record single name only setting in Polaris

Ann Thomas (Prospect Heights) seconded the motion

**Motion passed**

Please open a help ticket with ccs if you would like to cleanup a group of users.

Next week CCS will update relevant pages and will go live Monday, October 23.

**Recommendation to enable MessageBee automated non-blocking note for text notice bounces (DISCUSSION with ACTION)**

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

“[Date]- notification to [###-###-####] bounced.”

The note cannot be customized.

Recommendation came from the Circulation/ILL Advisory Group but at the time it was assumed that non-blocking notes would be prepended. CCS is awaiting confirmation from MessageBee and the proposed motion may be modified to specify enabling only if the message can be prepared to note field.

Discussion ensued about how this would impact workflows at various libraries and a motion was brought to the table. The consensus was that this would not be very helpful for most libraries.

Anastasia Rachmaciej (Park Ridge) made a

**Motion:** to enable MessageBee automated non-blocking note for text notice bounces

Keri Carroll (Fox River Valley) seconded the motion

**Motion failed**

**Changing an item’s circ status from check in (DEMO)**

Staff who do not have permission to edit an item’s record can now change the circulation status from the check in workform and can update single or multiple items at a time.

1. Check item(s) in to make available
2. Select checkbox next to items(s)
3. Select Action > Manage Item Record
4. Select checkbox for Circulation Status
5. Select desired status
6. Click OK

Bulk change circ status at check in can only be used with local items only and will not be available if an item record is open and locked from editing. You also cannot modify if the item’s circ status is In-Transit, Repair, etc.

**RFID Libraries using tape on non-RFID materials (DISCUSSION)**

Please do not tape RFID temp tags to non-RFID library materials as it damages materials. Removable tape or paper clips should be used to attach a temporary RFID card.

**Additions to the agenda**

Attributes on patron records in Polaris- Karen Bolton (Fremont)

Attributes of a patron record is missing from Warren-Newport patron records as a result of an oversight during their migration to CCS

Drive-up/drive-through circulation statistics

Debra asked for those who use drive-up/drive-through if they track statistics for those locations as a new feature coming to Polaris 7.5 where we would not need to use a separate branch for to identify pickup locations and would be able to use pickup locations. However, this new feature would impact gathering separate circulation statistics for these pickup locations. Debra will best determine next steps and work with Polaris.

**Library Showcase**

Zion-Benton Grand Re-opening of Adult Services – P. Pavelski/ZIK

ZIK was absent and the library showcase was not discussed

**Adjournment**

Tori Sergel (Lake Forest) made a

**Motion:** to adjourn the meeting

Ann Thomas (Prospect Heights) seconded the motion

**Motion passed**

The meeting adjourned at 10:42 a.m.

**Next Meeting**

**Friday, January 12, 2024**

**Live via Zoom**

**List of CCS libraries that use Collections:**

* Cary
* Ela
* Evanston
* Fremont
* Glenview
* Huntley
* Indian Trails
* McHenry
* Morton Grove
* Niles-Maine
* Palatine
* Park Ridge
* Round Lake
* Warren-Newport
* Zion-Benton