**Draft Minutes**

**CCS Circulation Technical Group**

**In Person-CCS OFFICE**

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

**(Fish Bowl Room)**

**Friday, April 12, 2024**

**9:30AM – 11:40AM**

**Chair, Athena Crouse (Niles) called the meeting to order at 9:30 a.m.**

**Attendees**

Belinda Husak (Algonquin Area Public Library District), Apisara Houltram (Algonquin Area Public Library District), Cheryl Allen (Cary Area Public Library District), Mari Swift (Crystal Lake Public Library), John Lavalie (Des Plaines Public Library), Michelle Meyer-Edley (Des Plaines Public Library), Laurie White (Ela Area Public Library District), Lori Sollenberger (Ela Area Public Library District), Karen Brown (Ela Area Public Library District), Gabriela Mansera (Evanston Public Library), Keri Carroll (Fox River Valley Public Library District), Danny Burdett (Glencoe Public Library), Karen Kee (Glenview Public Library), Jurga Mackoniene (Glenview Public Library), Danny Quinlin (Highland Park Public Library), Donna Ramierz (Indian Trails Public Library District), Tori Sergel (Lake Forest Public Library), Stephanie Haugan (Lincolnwood Public Library District), Janine Wisniewski (Mount Prospect Public Library), Athena Crouse (Niles-Maine District Library), Kim Hegelund (Northbrook Public Library), Karen Bollman (Palatine Public Library District), Anastasia Rachmaciej (Park Ridge Public Library), Ann Thomas (Prospect Heights Public Library District), Robin Nokes (Round Lake Area Public Library District), Alisha Smaby (Round Lake Area Public Library District), Cathy Sokley (Warren-Newport Public Library District), Matthew Hoffman (Wilmette Public Library District), Kris Nichols (Zion-Benton Public Library District), Dustin Smaby (Vernon Area Public Library District), Mieko Fujiura-Landers (CCS), Kiara Lyons (CCS)

**Approval of minutes from the January 12, 2024 CCS Circulation Technical Group Meeting**

Karen Kee (Glenview Public Library) made a

**Motion:** to approve the minutes of the January 12, 2024 CCS Circulation Technical Group Meeting

Ann Thomas (Prospect Heights Public Library District) seconded the motion

Motion passed

**Additions to the agenda**

* What are people are doing to get staff to improve and if not what are their consequences
* Innovative’s idea Exchange

**Officer reports**

Chair: Athena Crouse (Niles)

* None

Vice Chair: Dana Jenkins (Des Plaines)

* Absent

Secretary: Anastasia Rachmaciej (Park Ridge)

* None

**CCS staff reports**

Updates from Kiara Lyons - CCS - Find More Illinois

* Find More Illinois is a resource sharing platform.
* Go-live dates quickly approaching Algonquin and Morton Grove are going live in May
* Reminder to libraries to sign up for training. Registration is available in L2 calendar. First session is on April 23 and libraries should attend training 2-4 weeks before Go-Live.
* If libraries would like to promote the new platform, they can find marketing materials from the Find More Illinois website. CCS does not have anything planned in terms of marketing materials to share with patrons.

Update from Mieko Fujiura-Landers—CCS

Technical and advisory group information session webinar May 1 (what it means to be involved in an advisory group and to be an officer)

**Old Business**

None

**New Business**

Patron Record Merge – M. Fujiura-Landers/CCS (REVIEW)

* Where can I find information about patron record merges? CCS Circulation Manual
* Patron Merging Guidelines how-to page

When to Merge:

* Both patron records registered to your library
* Record matches on:
	+ Patron’s registered library
	+ Name
	+ Address
	+ Birthday (if available)
	+ Drivers License (if available)

When not to merge:

* One or both patron records are not registered to your library
* The Patron records are registered to two different libraries
* The patron names do not match
* The patron addresses do not match

If unable to match on the required fields, place a note on the patron(s) record(s) until you can check in with the involved libraries.

Post-Migration Merging

* Staff will encounter patron records with duplicate barcodes because of merged databases
* If comfortable, staff may merge duplicate patron records if you encounter them
* In addition to the barcode, continue to use the general merge criteria for determining if the record should be merged (ex/address should still match)

If there are any doubts….

….. Err on the side of caution and do not merge. Use notes to indicate the potential duplicate and reach out to other parties as needed.

Patron Blocks – M. Fujiura-Landers/CCS (PRESENTATION)

Soft blocks: act as alerts to staff and do not prevent the patron from checking out or renewing (alerts)

Patron has hold(s) ready for pickup, patron owes money under their max fine threshold (amount set by patron’s home library) and patron has overdue items under their max overdue limit

Hard blocks: will prevent the patron from checking out and may also prevent renewals

Patron owes money over their max fine threshold, patrons library card is expired, patron has been sent to collections, patron has a long overdue item\*, library staff have manually added a block\*

\*may allow renewals based on library settings

If you are part of an block override permission group, if you click continue you can override the block, if not you will need to get someone with authorization to enter their login/password to override the block will apply override privileges until staff member logs off of Polaris again

Patron Blocks at self-checks

In addition to system-driven conditions (expired card, owe over max fee limit), self-checks can block for the following conditions:

Most libraries block for:

* Library Assigned Blocks
* Collection Agency Block
* Blocking Notes

Uncommon settings:

* Verify User Block
* Free Text Block
* Associated Patron Blocks

Display Status - M. Fujiura-Landers/CCS (REVIEW)

Demo and review of display status

Display items how-to page: <https://www.ccslib.org/training/display-items>

* Item given circulation status of Display by staff
* Change status individually or in bulk
* Depending on permissions, can change status in item record/item bulk change or from Check in Workform
* When checking out at a service desk, staff need to clear the Display status first (will auto clear at self-check)
* Items with a display status do not appear on the picklist
* Items with a Display status are not counted as available copies

LEAP DEMO

Options!

Display circ status may be an option for you if…..

* Your library does a lot of checkouts via self-check
* You want the status to clear once it’s check out or check in

Other options

* Using a “Display” shelf location
* Leaving items as-is when they’re on display

Student Bulk Registrations - M. Fujiura-Landers/CCS (PRESENTATION)

CCS can work with a library to bulk register student cards

If your library happens to establish an iGA with a local school. Instead of manually providing library cards (Glenview, Round Lake and Northbrook already partner with CCS on this procedure)

1. School provides library list of student names and info
	1. There is a particular spreadsheet for the school to use (CCS will share spreadsheet)
	2. Once the school fills in the student info, the Library will fill in library information
2. CCS runs a report of potential dupes
	1. Dupe check will compare data from excel file to Polaris will match certain data points
3. Library reviews list
4. CCS creates bulk registration transaction file
5. CCS tests on training database
6. CCS uploads bulk registration to production database
7. Library issues library cards to schools/students

Officer Elections - M. Fujiura-Landers/CCS

FY24-25 Officer Elections

* Vice Chair/Chair Elect
* Secretary

Nominations

* Vice Chair/Chair Elect: Belinda Husak (Algonquin Area Public Library District)
* Secretary Elect: Janine Wisnewski (Mount Prospect Public Library)

Future Planning – M. Fujiura-Landers/CCS

The group shared what they would like to see for future Circulation Technical Group meetings through a future planning activity.

Patrons who own multiple properties across library districts – D. Ramirez/WGK (DISCUSSION)

Several times two members who own properties in two library service areas were merged

Option 1: non-blocking note

Option 2: under last name put patrons owns two properties

Option 3: NR taxpayer code and add a second address primary and other

Option 4: Mark do not delete in patron record which will stop future merges

Option 5: Check in with other library and talk with patron

Photo I.D.s for library cards

Majority of libraries require a photo i.d. to register for a library card

Clerks not improving

* The group shared various tips on how to help clerks improve.

**Other**

Continuing Education Opportunity – K. Hegelund/NBK

* Training opportunities coming up in September from Library journal- September 25 11-3
* LACONI 3 networking groups
* RAILS Middle Managers, Circulation Round Table (St. Charles), RAILS Circulation Group
* Back in Circulation in Conference October 7-8 University of Madison

Idea Lab

Innovative Idea Exchange- concept is to vote for your favorite ideas!

ILS – Polaris

How can we improve Polaris? You can submit an idea for a new feature or idea to make something better

Can also view ideas that others have submitted and vote

<https://ideas.iii.com/forums/951742-ils-polaris/suggestions/48194096-add-edition-statement-to-results-list-in-find-tool>

**Adjournment**

Anastasia Rachmaciej (Park Ridge Public Library) made a

**Motion:** to adjourn the meeting

Keri Carroll (Fox River Valley Public Library District) seconded the motion

Motion passed

Meeting adjourned at 11:40 a.m.

**Next Meeting TBD**