SWAN Circulation Advisory

Minutes - July 19, 2017

**Committee members present:** Cheryl Pawlak (DGS), Peggy Tomzik (ESS), Jessica Nawrocki (FRS), Debbie Sheehan (INS), Roberta Richter (LPS), Cindy Maiello-Gluecklich (MPS), Brittany Smith (WMS), and Julie Lombardo (WRS).

**SWAN staff present:** Dawne Tortorella, Kate Boyle, Crystal Vela, Dave Pacin, and Vickie Totton.

**Visitors present:** Jane Young (ADS), Linda DuPree (BWS), Nancy Freisinger (BWS), Jose Hernandez (BYS), Sandra Baumgartner (CIS), Francisco Cruz (CIS), Crissy Barnat (CNS), Norma Rubio (CTS), Mary Moss (EPS), Kate Cobo (Geneva PLD), Carla Hibbard (Geneva PLD), Kathy Zaleta (HSS), Lisa Knaisiak (HDS), Leslie Hartoonian (LGS), Juan Estrada (LSS), Marla Cole-Wieringa (MTS), Felipe Alatamirano (MWS). Martyn Churchouse (OPS), Victoria Muraiti (RFS), Sharon Shroyer (RSS), and Pat Sinacore (WCS).

Cindy and Debbie volunteered to bring treats to the September meeting.

**Discussion Items**

**SWAN Circ Policy**

Academic patron records: The committee members remember previous documentation that stated Academic Cards are not available for Reciprocal Borrowing. Academic Library cards may be issued to patrons from un-served areas and the patrons also tend to be more transitory which makes them harder to track.

Updating of patron records: It was the consensus of the committee that adding a bill to a patron record is not modifying the record however you should not bill another library’s patron. Bills should only be added by the patron’s home library and nothing needs to be added to the policy.

Library to library charging: It was recommended to add a statement to the policy that no invoices should be issued between two SWAN libraries and billing should only be handled by SWAN.

Refund for previously paid materials: It was recommended to add RB/ILL to statement regarding reimbursements.

Kate informed the members there will be a Quarterly Billing workshop held for the new 19 libraries but all current SWAN libraries can also attend.

**Unpayable bills:** If a library overrides the attached bills when they delete an item instead of allowing it to go through the DISCARD process any bills (overdue, lost, damaged, etc.) will lose the item information and staff will not be able to pay them. SirsiDynix will change the type of bill for any unpayable bill which will allow staff to pay them but this is only a temporary fix. If library staff continue to delete items they will continue to make bills unpayable.

**Best Practices:** Please continue to send them in, it appears we are all thinking of the same best practices. SWAN will continue to compile the suggestions as they come in and present them to the committee.

**Damaged and Unusable materials procedures:** The Committee and visitors were asked how things are going with the new procedures. The attendees were happy with the new procedures but it brought up a lengthy discussion regarding what qualifies as unusable. Some libraries are returning items as unusable that owning libraries feel would be fine to circulate. It was speculated libraries are afraid they may be billed for damage that had already occurred if they were to circulate it to their patron. Some patrons are refusing the material themselves, if that happens it was suggested to write that on the routing slip when returning it to the home library. It was also suggested there be a table at SWANstravaganza with examples of what is and isn’t usable; SWAN will coordinate the table. There was a suggestion to include in best practices that library staff document damage under the barcode of the item so other libraries will know the owning library is aware of it.

**NONSWAN\_RB:** There was a lengthy discussion regarding the proposed changes to the SWAN Hold Map and Profile Privileges to standardize policy for external patrons. The committee members voted unanimously to recommend the proposed changes as outlined, see below \*. It was also recommended we contact Chicago to see if they give preference to their patrons over RB when fulfilling holds.

**Updates**

**Automatic Renewals:** They were turned on last month; how is it going? There was a bit of a learning curve and most patrons seem to love it. There have been some patron complaints regarding the loss of control and one library is worried about the loss of revenue. It was recommended libraries have some patience as once the renewal limit is met for items the patrons who have always been late will continue to be late.

**BLUEcloud Analytics (BCA) website statistics:** The circulation statistic report templates have been removed from WorkFlows. There are a multitude of reports in BCA for libraries that would like to run their own reports. SWAN will continue to post statistics on the support site for those who prefer not to run them.

**In Transit report & meeting with Mark Hatch:** CTL informed us they like the auto-generated labels because they are very easy to read. Mark thought all SWAN libraries were moving to the software but Kate let him know they were waiting to hear back from RAILS. SWAN will look into an alternate solution for all SWAN libraries. SWAN staff will be meeting with RAILS and CTL staff again.

**My Account editable fields:** Dave demonstrated the new functionality he and Michael Szarmach adjusted to allow patrons to log in to Enterprise and edit an existing email address in their account. It was the consensus of the committee to open the functionality to the membership.

**New 19:** Kate reported the project is moving along fantastically. SWAN, LINC, and MAGIC staff agreed to a single go-live date of May 1, 2018. The single due date will allow for the least amount of downtime for all.

**SWANstravaganza “Stump the Experts”** Julie, Brittany, Debbie, and Cindy volunteered to be on the panel. It was suggested Samantha Dietel join the panel due to her high level of expertise.

**Missing On Hold Shelf items:** Crystal discussed the new generic user that was created for items that are listed on Clean Hold shelf reports but can’t be found. SWAN will monitor the user and suggest procedures for cleanup as needed.

**New look on WorkFlows test:** SWAN staff will send out a SWANcom alerting libraries when we will test turning on the display of checkouts, holds, and bills in the Charge/Checkout wizard.

**Quarterly Billing:** The billing information has been given to RAILS Accounting, libraries should have their invoices or checks soon. Helen will have the reports compiled soon and will upload them for viewing online.

**What’s new:**

Cindy announced Melrose Park will be changing their operating hours effect September 5. They will be open Monday thru Thursday 8 am to 7 pm, Friday 8am to 5 pm and their usual Saturday schedule. They also have a new phone number; she will update their listing on L2.

Debbie announced Indian Prairie has removed all the locks from their AV material.

Peggy announced Eisenhower will be closed on September 5 for the installation of a new phone system.

Cheryl said Downers Grove has also stopped using security on their AV.

Rebecca said La Grange is moving all AV to slim cases.

Brittany announced the renovation at Westmont is mostly finished for now; they still need new carpeting and paint in some areas.

Marla announced Rene Navarre has retired from Matteson, Tom Webb is now the Head of Circulation.

## \* Proposed Practice

Changes to the Hold Map and Profile Privileges are recommended to standardize policy for external patrons, while providing the enhanced service to these patrons to place a limited number of holds through Enterprise without negatively impacting the service provided to our own SWAN patrons.

## Proposed Hold Map



Libraries which do not want to allow holds by external reciprocal borrower patron profiles on their items, can request an addition to the hold map, as highlighted.

### Proposed Profile Privileges (CHICAGO\_P & NONSWAN\_RB)

Hold Rank:

Recommended Hold Rank = 199 which will place external SWAN patrons below SWAN patrons in hold queues.

Hold Limit:

Synchronize hold limit to 5 items.

Charge Limit:

Synchronize charge limit to 50 items.

Overdue Charge Threshold:

Change Overdue Charge limit to 5 items. This ensures fine-free libraries have restrictions in place to block since Bill Threshold will not trigger.

Bill Threshold:

Synchronize to $5.00.

Privilege Limit:

Set default privilege expiration to 1 year, again expiration will be set based on home library’s expiration.

