VALNet Circ. Meeting Minutes

March 17, 2015
Prairie River Library – Lapwai, ID

Attendance: Vicki Johnson, ACL; George Williams, LCLD; Kari Kerns, Lewiston Schools; Marcia Player, CMP; Lynn Johnson, MVSD#244; Becky Schmidt, LPE; Vickie Coats, LPH;
Shelley McPhersen, OHS; Lisa Puckett, Dixie Alford, Lisa Curnutt, Carma Hammon, PRLD;
Millie Wimer, PHS

Meeting was called to order by Lisa Curnutt.

1. **Too much tape on routing envelopes?**
   Reminder: Please do not tape routing envelopes shut from edge to edge. A piece of packing tape (or two on wide envelopes) over the center from front to back of the envelope will secure the items. Couriers report that using 2 small pieces of Scotch tape do not always hold items closed. Can we please all strike a happy medium?

2. **Applying fine payment to patron's record at the time of payment:**
   When one library handles its fine entries via one staff person...and not when the fine is paid by the patron, the other libraries do not know that fine has been paid. We have had a patron unhappy because a fine was paid elsewhere, but not logged to her account that same day. Another library refused to check out to her because of the delay. If this is how it is going to be, could we please at least post a note in the record that the fine was paid...until the designated staff member has the time to truly enter the fine? Vicki/ACL

   After much discussion about this topic George (MOS) reminded us to refer to the VALNet Staff page/ VALNet policy Circulation Guidelines which state, "Any patron should be able to do the following at any VALNet library… Pay Fines And Have Them Posted Immediately At Any VALNet Library."
   http://www.valnet-staff.org/uploads/2/1/5/0/21501608/circulation_guidelines_policy_rev._march_2010.pdf
   Lisa Curnutt will contact the libraries that delay patron payment application to clarify this policy.

3. **Deleting email (or other info) from other agency's patron records:**
   KAM library had another agency delete one of their patron's e-mail addresses because that agency had gotten an e-mail bounce for the patron. However, the address was correct.

   Remember that we should not make changes to other library's patron records unless the patron is standing right there with new information. (e.g. new address, phone number, etc.). If you experience a problem such as e-mail bounce with another library's patron place a message on that patron's account with a simple description of the problem encountered. Be sure to add your initials and your library's 3 letter code at the end of your message.
   George (MOS) also offered an explanation about causes for e-mail bounces. Typo in the address, patron's mailbox is full, spam filter turned on high may block messages it recognizes as generated by a computer. He suggested that you read the message in the bounce notice. It will usually explain why the message returned. If you verify that you have the right e-mail address in a

patron's record try removing and re-entering the address. Sometimes there can be space at the end of the entry that will not show on screen.

4. **Addresses in patron record**
   Mailing addresses, not physical addresses, are the primary address in the patron record; too much returned mail.

   Dixie (LAP) reminded everyone that many people have PO Boxes, but their records only show their physical address. It is important to have the correct MAILING address for patrons. George (MOS) was able to edit the patron record form during this discussion. He has changed the wording from "Main Address" to "Mailing Address". He also changed "Alternate Address" to "Street/Physical Address".

   Lisa C. (LAP) shared an idea from a Wyoming library where her son lives. When a new patron applies for a library card they are mailed a "Welcome" postcard. In order to finalize their new card they must take the delivered postcard to the library. This gives the library verification of a working address.

5. *How to limit loss of materials:*
   What does everyone do about limiting large loss of materials – limiting number of items checked out? Limit "new" patrons to fewer items than regular patrons? Turning amts. more than $__ over to collection? Other ideas? LC/PRLD

   Thoughts, opinions and agency policies were varied on this subject. Some felt that loss of materials is just the cost of doing business. Some agencies limit patrons to a specific total of items checked out. Others limit the quantities of item types (3 DVD, 3 Books, etc.).

   Discussion point Re: Parents using young children's cards to check out several items because their own cards had large fines or overdue items on them. This has caused the child to be unable to use their card for school check outs. What can be done about this? Again opinions and policies covered a wide range.

   Discussion point Re: Turning fines over to collections. No one present represented a library that turns accounts over to a collection agency. It was reported that Whitman County Library does turn over unpaid fines and fees above $25 to collections after the Library Director makes a personal call to the patron explaining that collections will be the library's next step if the fines are not paid promptly.

   Discussion point Re: Staff holds for 'Restricted' patrons. Lynn (MVSD) stated that her libraries do not send out items to fill hold requests to 'Restricted' accounts that have large fines or overdue items. It was noted that patrons with 'Restricted' status cannot place holds on the OPAC. It stands to reason that library staff members are placing holds for 'Restricted' patrons. Refer to VALNet Circulation policy (see link above) regarding Delinquencies. Holds should not be placed for patrons with overdue items or fines.
   When does a patron account become restricted? The Restricted status is triggered when a second notice is sent to the patron 14 days after an item becomes overdue. Manual restrictions

can also be added to patron accounts. When adding a manual restriction an explanation is entered by the agency that adds the restriction. NOTE: When a patron with 'Restricted' status returns overdue items and pays fines the restricted status must be removed manually by staff. If you find a patron record with restricted status but no fines or overdues and the status has not been added manually you should remove the restriction.

Discussion point Re: KOHA Long Overdue/Lost items.   It was noted that the KOHA overdue notice settings send a First notice at 7 days; Second notice at 14 days, Lost Item/Billing notice at 60 days past due. However, KOHA does not charge the patron account for Long Overdue/Lost item until it is 90 days past due. A poll was taken of those present regarding whether the KOHA Long Overdue/Lost status trigger should be changed from 90 to 60 days to synchronize with the billing notice. It was agreed to change to 60 days. Lisa C. will pass this recommendation on to the VALNet directors at their next meeting.

6. **KOHA Upgrade update:**

   The webinars are shorter than previous ones, covering highlights and answering questions.

   It was suggested that you review the Release notes and Training notes before the webinar to get your questions answered during the live webinar. Links to these notes are available on the KOHA Home page. George stated that some of the new features may not be used by VALNet. The VALNet directors will review options for new features and decide which to turn on.

7. **Koha tools to use:**
   a.   *Holds Awaiting Pickup – daily tool for trimming down the hold shelf*
   b.   *Transfers to Receive – can help find wayward items*

   Both of these simple reports are useful management tools. The Holds Awaiting Pickup shows holds that are past the 7 day hold should be cancelled and returned to their owning library.

   The Transfers to Receive report shows items that are in transit to your library. Items in transit more than 14 days are highlighted in red. If you have items over 14 days in transit you should check your shelves for the items. If found, check them in. If you don't find them at your library contact the sending library and have them search their shelves. If the item is still not located send out an APB. Items that are still not located should be treated as missing items per the owning libraries policies.

8. **Formalize approval of Circulation Mission Statement and Bylaws** – *LC/PRLD*

   MOTION: Vickie Johnson (ACL) moved that the Circulation Mission Statement and Bylaws be formally approved. George Williams (MOS) seconded the motion. Motion carried on a voice vote. These are on the Staff pages.

9. **Review of Circulation section of Staff pages :**
   Should the online Staff pages be kept and updated? Who would maintain? What information is needed on these pages? There are currently several quicksheets available. Others can be created as requested.   There is a Request or Contribute Quicksheet button which links to lcurnutt.riv@valnet.org. Feedback about Circulation Staff pages is invited. Reminder: Staff pages can quickly be found by using the KOHA link menu.
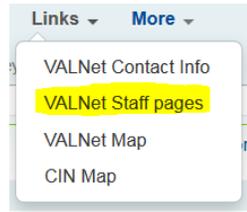
10. **Info about using KOHA Reports:**
    Vickie Coates (LPH) asked for more information about using KOHA reports to run lists of patrons with Overdue fines owing. Lisa C. offered to arrange a time to meet with Vickie for additional help.

11. **Patron Requesting Modifications:**
    Remember to check the Patrons Requesting Modifications link on the KOHA home page.

    Ex:

    Please follow up if any of the patrons submitting requests belong to your library.

    Meeting adjourned at Noon.

    Next meeting to be held at Lapwai on May 19th at 9:00 a.m.

    Lisa Puckett
    Acting Secretary