Circulation Team Leaders Meeting Agenda  
West Campus  
1/23/15  

**Attending:** Josh Barnes, Melanie Brennan, Andria Burton, Travis Budd, Natalie Manke, Sarah Wagner  
**Scribe:** Sarah Wagner  

- Josh opened with a short discussion on establishing norms for the group. As far as needing a timekeeper or establishing norms for this committee, we’re good for now. Everyone is in agreement.  

- Next we talked about the “Expired Patron” issue that we’ve seen this semester. Travis asked if we are going to keep sending a list of any expired patrons to Bob. Josh said that he thinks that it is cleared up for now and that if someone is expired, it is likely they are not enrolled. The place to check on Banner is SFARGQ. This brought up the question: do we need more Banner training? We think we’re okay, but we feel that we’ve had to train ourselves for the most part. Melanie and Sarah were unfamiliar with SFARGQ. We also talked about Customer Service and erring on the side of believing someone when they say that they are enrolled. Another point about Information Systems updates to Voyager, when adding expired patrons and patrons not in Voyager. So – the email address expires separately from patron record, we think? It’s been a problem this spring. What about no address? They still need to be in Voyager, what if they are homeless? Some of our students are homeless, so an email and phone should suffice in those cases.
• Concerning books on HOLD being sent from another campus – please fill out the callslip if possible. If not, send in an envelope addressed to the CTL so that they know or at least let them know that it’s on the way and who it is for.

• Next we talked about Transcript and Registration Holds. All agreed that the process is going well, except for a crafty person Melanie mentioned who was overriding and renewing books with a “lost item” status. We thought putting a hold on the items would stop that. This opened a discussion about renewing items with lost status. Can they be renewed? If a few days, yes. We agreed to renew on case by case status. The group also agreed that we’re due for a Bob list. It will be for soft holds other than patrons with 5 items or items adding up to $250.00. We reviewed that there is specific verbiage to use for each level/type of hold. Josh also proposed that when we are removing a Soft Hold that we just change the date in SOAHOLD like the Bursar does. This way the record remains in Banner. We agreed that either way is fine (changing the date in SOAHOLD or leaving a note in SPACMNT.)

• How long do HOLDS on Hold-shelf last? Natalie said you can set expiration date in Voyager.

• Semester Activity Report – we all thought it went well. Circulation stats are up but other stats are down. We think that the aides are marking tallies better. What about LiAnalytics? We want to keep the two categories not four. We also think that not recording stats the same across the board makes for bad data gathering. Travis is redoing the chat stats. Melanie will pick up the ILL stats for end of spring semester activity report. This launched us into a discussion about ILL numbers being down. We agree that
sending out ILLs (new books) can be case by case. We all agree that it would be interesting to see the rate of return on all items we lend out for ILL.

- Courier items (Nothing)

- Updating New Staff Packet – Should we have anything about HOLDS? Josh will add and send what he has. We all agreed to keep our own packets and procedure manuals updated.

- Circulation training for staff (Sarah) – Andria would encourage all part-time staff and whoever else would like some training. We need to send out an email asking staff what they’d like to know more about. We brainstormed on the following topics:
  - Callslip: What to do if looking for an item and can’t find it. What to do if you accidently hit “Process”, how to recall it and “Un-process”.
  - How to remove fines.
  - How to add Pop-ups in patron notes and item notes.
  - Placing/removing HOLDS in Voyager as opposed to OPAC. Making sure staff knows the difference between a Hold and a Callslip.
  - Creating patron records/adding patron.
  - Adding OK Share or Alumni patrons.
  - Resetting “Lost items” counters for patrons, softer training about unknown notes, such as “Lost items limit” overrides.
  - Showing Banner to at least familiarize staff with that process.
  - Modifying due dates.
  - Moving from Patron to Item records (Shift F2.)
  - How to look up reserves in Voyager.
• We will be adding to the above list. Andria might have to get Bob to install Voyager on a classroom computer for training, or we might do it at the desk. We will discuss this in the future.

• We tentatively set the training for the summer semester as WC and NEC will be doing inventory during intersession.

• We can also send a Survey Monkey survey to staff to check which things they would like to have training on and to see if they have any other suggestions for training.

• We might need to have a separate meeting just about training.