Circulation Team Leaders’ Meeting Notes

9/16/16

Location: Northeast Campus Library Think Tank
Attending: Josh Barnes, Melanie Brennan, Bob Holzmann, Melissa Kash, Natalie Manke, Sarah Wagner
Notes: Sarah

- CTL Chair Rotation – We decided to go to a two year rotation, beginning with the next fiscal year. Josh will remain chair until June. The job of the chair is to lead meetings and come up with meeting agendas. The agenda is a combination of items the chair wishes to discuss and those proposed by others on the committee. Another task for the chair is to round up statistics at the end of each semester.

- Procedures for when library website goes down – The Library website is maintained by Megan Donald at WC. She is the “go to” in case the website goes down. If she is not available, Bob and Amy are the backups. Calling 2000 will do no good, as our website is internal. Make sure library staff are aware of this.

- Policies & Procedures for Reserves checkout – We will not take IDs. We will check the item out to the patron. Josh pointed out that the only reason we might need a picture ID is to identify a person if the book is needed. As far as how we keep the cards for each item at the desk – go with what works best for each campus. Josh will email CTLs the Banner information for SFAREGQ. We can use it to look up a student’s schedule and track down missing reserve items that way. (CCing the instructor in the email yields good results!)

- Checking in delivery items – We need to be more mindful about making sure that all items are getting checked in as there is some concern that items are getting stuck “In Transit”. Make sure to acknowledge popup notes. It’s possible that human error can be the culprit but it might also be an issue with the scanners. Perhaps we need new scanners. The CTLs would like to be involved in the selection of any new devices. If possible we would like to have one to demo. Melissa will bring the question of new scanners to LMT next week. Natalie suggested we look in to the Motorola brand. We also need to make sure that if an item is in Tech Services, it is checked out to the correct card. We should look for any pattern. Everyone makes mistakes, so we need to be more attentive to making sure items are getting checked in. We should keep notes on things that are missing.

- Video Checkout Policy Update – Policy on video checkout needs to be updated. SE will begin checking some out soon, once they get shelving. Checkout will be for 7 days, no renewal with a limit of 2. Action Item: write up new policy and submit to LMT for approval. We will have it ready by October 4th.
Reference Circulation Policy – Not every campus has a reference section. We can treat it as a case by case basis if we want to check out any reference items. Josh usually checks with a librarian. If we send an item to another campus we can add an item note saying it is not to leave the campus. We can check an item out at our discretion campus to campus.

In Transit & Overdue Items Aging Reports – We haven’t all been consistently running the In Transit report. SE & WC run it daily. We do run the Over Due Items Aging Reports every two weeks. Should we just send all Holds to the Bursar? We all agreed that the Registration Hold has more teeth. We could then eliminate Transcript Holds that we place in Banner. This will also lessen the need for Banner access for library staff. We need consistency. We need to be notified so that we can remove any fees/fines in the patron record. As long as the Bursar is okay with putting the Holds on, they can also put in the amount owed. But – who carries the burden of alerting us that an item has been paid for? That should be on the student and not on the Bursar. Josh will write something up. Make sure that staff know that if a student pays at the Bursar, they need to come back and let us know. Apparently there is no way to print a bill in WMS. That would be a nice feature.

Hotspot policies – There are no renewals for a hotspot. A patron needs to wait 24 hours before they can check it out again, even if no one is on the waiting list, so that others have an opportunity to check it out. There is an issue about holding them on a waiting list, because they show up as available in the catalog. We are wondering if staff can put a hold on an item without patrons being able to. Can we put an item level hold on them? We need a stop gap, a way check them out to something so that they will show up as unavailable. A dummy barcode might be the answer. Or, we could go back to making them temp items. Discussion then turned to habitual offenders turning the devices in late. There is an automatic $20.00 fine for overdue reserve items per day. We can forgive that once, but after that, the fine won’t be waived. Also, they cannot check out a Hotspot again until the fine has been paid. If it was waived/forgiven once, put it in a patron note. Check notes when removing fines and waiving them. It also came up that it would be nice to have a hotspot available for librarians who go off-site to a high school to teach an InfoLit class. Quite often, the school’s firewall makes it impossible to access the library website. It would be great to have more hotspots. We all need to keep track of data to make our case. One way to do this would be to keep track of how many are on a waiting list. We can text them through “Ask Us” to let them know the hotspot is available for checkout.

Forms on KM Guide – The forms need to be updated on the KM guide. Everyone is using the same Materials & Devices Agreement form, so the other/old agreement forms can be archived or eliminated. We will alert Andy to this. Bob will take care of sending the most current Tech Services processing form. Andy also needs to link to the OK Share form on the Oklahoma State government site. It will have the most current form to use as well as a list of participating institutions.
Questions with Bob – We had several questions for Bob, who joined us for the last portion of our meeting. First, the new Rush forms. J.P. can send some out if we need them now. We can email him (James Moorman). There is approximately a 4 – 6 week back log in cataloging and Tech Services. Josh then asked Bob about some of the item records for certain DVDs that are set up for a 4 hour checkout. Bob said to send him examples. Send as much information as possible because the issue might be the patron type. We then asked Bob if it was possible for Hotspots to be set up to allow staff but not students to place Holds. Bob will look at this to see. Another option might be to set up a dummy number to charge them to. Bob asked us for scenarios dealing with searching in Discovery, for training at the January retreat. He’s looking for scenarios or examples of why one can’t search a certain way or how to search in Discovery. OCLC wants to develop some training based on our questions about the Discovery system. We should keep our eyes and ears open and send him any Discovery questions we have. Josh asked about OCLC possibly putting the newest edition of an item at the top of the search results (as long as the item is ours.) There’s apparently a thing about relevancy sort. We’re wondering if relevancy can be customized. Send Bob our questions.

Next Meeting  
Date: 11/18/16  
Location: Southeast Campus  
Notes: Travis