

Resource Sharing Advisory Council

January 28, 2011

Present: Betty Albright (BETH), Tim Burke (UHLS), Rob Carle (UHLS), Sarah Clark (APLM), Dawn Geurds (EGRN), Lisa Pitkin (GUIL), Carol Melewski (RCSC), Virginia Prew (TROY), Joe Thornton (UHLS)

Introductions, standards: Because we didn't meet at all in 2010, and because Tim Burke joined us, we did quick introductions and then Tim asked that the group consider the libraries' circulation policies (max items out, max fines, etc.) with an eye toward standardization. We looked at the "Circulation Parameters" report on the Ad Hoc Reports page (<http://horizon.uhls.lib.ny.us/reports/>) and will use that to try to identify parameters that might be candidates for standardization. We'll discuss them at our next meeting.

TeleCirc:

- **Review the capabilities of the TeleCirc system:** Because APL no longer sends printed hold or overdue notices, Sarah asked for an explanation of TeleCirc's features. Joe listed most of them:
 - TeleCirc is the default notification method for all new patrons when their borrower record is created [except at RENS, which we found out on 1/31 – Joe].
 - If TeleCirc fails to reach a patron after two attempts it passes the notice to the print program.
 - We turn TeleCirc off on major holidays – always Thanksgiving and Christmas, and often other holidays as well, if turning it off won't lead to an enormous number of printed notices being generated.
 - TeleCirc completes about 12,000 calls a month. This is down from about 18,000 a month not too long ago, as more and more patrons switch to email.
 - TeleCirc is no longer supported by SirsiDynix, and it's a proprietary system (i.e. we can't change the code). A replacement phone notification system would cost about \$15,000 so we plan to nurse TeleCirc along until it dies. A representative of *TM3* (the new supported phone notice system) will meet with UHLS in February.
 - There are two TeleCirc reports on the Ad Hoc Reports page on the UHLS website (<http://horizon.uhls.lib.ny.us/reports/>). They are "TeleCirc Logs (by patron name and date range)" and "TeleCirc Logs (by library and date range)."
- **The "TeleCirc Problem":** EGRN has been getting complaints from patrons who did not receive a TeleCirc call, and whose holds later expired. Joe explained that TeleCirc completes about 12,000 calls a month, and that no other libraries have reported the problem. He asked everyone to let UHLS know, in as much detail as possible, when they hear of TeleCirc problems.

Prior borrower information: Dawn reported that “When an item ages out to Lost Status the entire prior borrower information is gone.” Rob said that this is determined by the thirty day limit on an item’s stay in the circ_history table. We’ll look into extending that time to sixty or ninety days. Consensus is “the longer the better.”

Filling request with damaged items: Dawn reported that damaged items are still being sent to fill patron requests. Joe will email everyone to ask that don’t send damaged items.

Patron registration cards: Dawn asked if all libraries are sending patron registration cards to the patrons’ home libraries, and if the home libraries are changing the location and Btype fields. These fields are important for restricting some databases and other services to a library’s patrons if those services are not offered system wide. The recommended procedure is to send the cards to the patron’s home library, and for those fields to be changed by the home library. Joe reminded everyone of the reports on the *Ad Hoc Reports* page (<http://horizon.uhls.lib.ny.us/reports/>) that can be used to identify mismatches between Btypes and Locations. The reports are: *BType -- Location Mismatch* and *Location -- BType Mismatch*. Joe will send a reminder to everyone about this procedure.

Temporary cards / redlining: Betty reported that some libraries are issuing "Temporary" cards, and they are not red lining them. The discussion centered on the distinction between Temporary and Out of System cards. We agreed that everyone should redline Out of System cards but it’s not necessary for Temporary cards.

The following was added by Betty via email: However Temporary cards must be entered as such and patrons should be aware that they may not be honored by other libraries. If a patron from another library with a "Temporary" card comes to BETH for instance BETH will not honor it and will put a block on the record to that effect.

Expiring patron cards: Someone (sorry - I forgot who made this great suggestion) asked if we could send email courtesy reminders to patrons whose cards are due to expire in two weeks. Joe said sure, and Tim suggested that we run it by the directors first. Joe will draft the text of the notice and ask Resource Sharing to approve or edit it.

Messages from patrons: When emailing libraries through the interface we provide on the HIP and UHLS website, patrons often ask for help but don’t include their contact information. The input form already has this blurb:

Important: If you'd like a reply by email, be sure to include [your email address](#) in the space provided. If you need assistance with a library transaction, please include [your name and borrower number](#) (on the back of your library card) in your message.

We discussed requiring a barcode on the form, but that would preclude anonymous comments, a valuable function of this tool. We decided that UHLS should include a separate, optional barcode input box on the form, hoping that patrons will get the idea.

Next meeting: Joe will look for an available date in the near future.