

**Circulation Advisory Council  
November 7, 2018**

**Present:** Philip Berardi (GUIL), Rob Carle (UHLS), Sue Hoadley (WSTR),  
Debbie LaRose (COLN), Jen Murtha (VOOR), Robert Sheedy (APL), Sylvia Taylor (BETH),  
Joe Thornton (UHLS), Virginia Wescott (TROY)

**eCommerce update:** Joe described the status of this service, which went live on 11/1. Patrons are using it and we've got the reports in place to determine how to distribute the payments quarterly to the libraries that own the related items. There was a configuration issue in the first few days that will make us unable to determine some items' owning libraries. The total amount of payments for these items is about \$150 and UHLS is confident they can fairly distribute this money

*Related:* *How will we handle horizon billed items that get paid in eCommerce?*

Two procedures, to the best of my recollection (which could be totally wrong):

First up, Sylvia (BETH):

Specifically, these items are billed under fines with a statement that says something like "Lost fee for item with barcode 381182012641973". So if a patron finally pays it, the fines will be marked as paid but all those lost items will still show up under their checked out items until someone goes in and removes the items from patron's record. These item that remain on the patron account has the following message on the item record "Item billed in Horizon. Patron charges must be cleared manually. Give item to supervisor to clear charges before reshelving."

It is a multiple step process to clear this type of charge.

If a patron pays for a lost item (Lost fee for item with barcode 381182012641973)

Clerk takes payment for the lost items and marks them as paid

However, these items are still on their account under checked out items so they need to be "mark lost items" which will move them into fines and from there they will need be waived so patron does not pay for them a second time.

If a patron returns a lost item:

If patron returns the books, and we check them all in, the items will move from checked out items with the maximum fine but all the billed horizon items (that

says Lost fee for item with barcode 381182012641973) will still be on their fines list because Sierra doesn't recognize they are the same item. So clerk must manually go in and waive the lost horizon billed fee and keep the late fee charges on them (and these indicate by title, barcode and call number)

Those item returned will be checked back in and their item records will all have the message that they were billed in horizon and it needs to be taken off if you plan to circulate them.

Next, Virginia (TROY):

1. Mark the item 'lost' in Sierra.
2. A bill gets generated.
3. Library pulls the bill before it's sent.
4. Waive the manual charge.

I believe the challenge for UHLS is to identify for the libraries the items and patrons involved in an eCommerce payment for something that was billed in Horizon.

**Loan Rule #1:** When a blocked checkout is overridden at Circ, the checkout gets Loan Rule #1, with a 1-day loan period, \$1.00/day fine, and, until recently, large billing and processing fees (removed by Joe a few weeks ago). Joe asked if this was a problem. Answer: No big deal. Let's move on.

**'Collect money' button:** Rob described a problem that was reported by a library: The 'Collect money' button was grayed out in Sierra. Answer (thank you, Ginny): You must select the fine first.

**Training page:** Rob showed the updated UHLS *Training* page, encouraged people to use it, and asked that everyone share comments or suggestions.

**APL going fine-free:** Robert shared this major announcement.

**Next meeting: Wednesday 12/5/2018 at 9:00 at UHLS.**