

Meeting summary for Circulation Advisory Council (08/07/2024)

[Zoom Summary, edited by JT]

Quick recap

The group discussed various technical and operational issues related to the library's email bills program, including problems with headsets, cameras, and the new email billing system. They also addressed concerns about patron billing, handling unapproved checks, and issues with the library's check-in and check-out system. Lastly, they identified the need for standardization in address formatting and committed to investigating and resolving these ongoing issues.

Next steps

- Joe will write a report to identify patrons with incorrect or incomplete addresses in their records.
- Virginia will investigate the issue with the billing notices and determine if there is a character limit for the address field.
- Qin will explore the possibility of standardizing address formatting across all libraries.

Summary

Email Bills Program Libraries Discussion

Joe decided to wait a few more minutes for Sylvia, who was responsible for managing the process of the email bills program. Joe planned to email the list of libraries using the program to ask if they could answer questions through email. Eva Romero, responsible for managing the process, was identified and it was noted that she could handle any pressure. Joe then proceeded to read the list of libraries using the email bills program, highlighting that there were no reported problems with the program.

New Email Billing System Success

Virginia reported that the new email billing system had significantly eased the workload, freeing up staff time, and there had been no negative patron feedback. The system, which filters bills based on patron email addresses, had reduced the number of physical bills sent out by half. Virginia also explained how she handles bounced emails and the steps she takes to ensure patrons receive their bills, even if their email address is no longer valid. Joe clarified the program's criteria for sending emails and how it handles bills that cannot be delivered via email.

Billing Process and System Modifications

The group discussed the process of printing and sending bills, with a focus on the exception made for APL due to their unique billing policy. Virginia explained that

system-generated bills are still sent to APL patrons to maintain their billing policy, despite the library's shorter billing cycle. Joe suggested a possible program modification to specify criteria for APL's email bills. The group also discussed the cost savings from not sending physical notices, with Sylvia confirming the average postage cost. Lastly, Joe announced the recent update of the Circulation Advisory Council contact list, with thanks to Sylvia's prompting.

Handling Patrons, Fines, and Interlibrary Transactions

Sylvia raised a concern about patrons being sent between libraries due to unapproved checks. When an item is owned by another library and a charge is incurred, the patron should contact the owning library. Virginia and Qin confirmed their libraries follow this procedure and encourage online payments. The group discussed handling fines, with the consensus being that fines should be paid at the patron's home library. For lost or damaged items from other libraries, the patron should either pay Sylvia's library if under \$10 or contact the owning library. Sylvia noted an issue with APL not properly waiving items. Virginia shared her practice of encouraging online payments to avoid staff intervention.

Addressing Library Check-in/Check-Out Issue

Sylvia discussed an issue she's been encountering with the library's check-in and check-out system. Occasionally, when an item is scanned, the title displayed does not match the barcode, causing confusion. In some instances, the system has incorrectly assigned an item to a different patron. Sylvia and Joe agreed to further investigate this issue. Virginia suggested that the problem might be related to the barcode being scanned too quickly or being in the wrong position. Sylvia confirmed that they have the same scanners as other libraries and they had tried using a different scanner, but the issue persists.

Addressing Title Check Issues and Solutions

Sylvia and Virginia discussed the issue of incorrect title checks causing frustration among patrons. They identified potential causes, including staff errors and problems with certain types of media. The group decided to investigate further and monitor any issues related to the library's checkout system. Various problems were shared, including disappearing information, slow check-in processes, and bypassing patrons. The group agreed to report these issues to the relevant authorities for resolution.

Address Entry Issues and Solutions

The group identified issues with incorrect address entries in their system, particularly affecting billing and other functions. Virginia pointed out problems with punctuation in the street fields and the potential for truncation if the address is all on one line. The group agreed that the issue is complex and not easily addressed in batch, but

committed to exploring potential solutions. They also clarified the distinction between mailing and physical addresses, with the former being entered first and the latter as a secondary address. Lastly, they agreed on a standardized format for addresses in internal notes, removing unnecessary punctuation and ensuring consistency.

Addressing Patron Information and Standardization

Joe agreed to write a report to identify patrons with incorrect email addresses and expired cards, which would then be manually corrected. Virginia's group expressed their willingness to assist with this task. The group also discussed the ongoing issue of incorrect address formatting, with a focus on the need for standardization. It was noted that this issue is not new and has been an ongoing concern. The group agreed to continue monitoring and addressing this problem.