

Meeting summary for Circulation Advisory Council (05/07/2025)

[Zoom summary edited by Joe]

In attendance: Rob Carle (UHLS), Joe Thornton (UHLS), Emily Willerth (APL), Kayleigh Hartnett (TROY), Sylvia Taylor (BETH), Qinfeng Chen (GUIL), Kirsten Heller (RCSC), Jessica Lynn (APL), Sarah Kerr-Mace (MEND), Pam Jacobson (SNLK), Molly Davis (VOOR)

Quick recap

The meeting covered various aspects of library operations, including staff introductions, online registration processes, and patron record management. Discussions focused on improving the searchability of preferred names, adding a guardian field to patron records, and implementing a new online registration system with enhanced security measures. The team also addressed issues related to duplicate accounts, multiple library card requests, and e-commerce payment discrepancies, while emphasizing the importance of address verification for library card applications.

Next steps

- Rob to ask if the preferred name field can be made searchable in Sierra.
- Rob to investigate adding a guardian field to patron records in Sierra.
- Rob to look into ways to search by notes in Sierra records.
- Emily to send details about her duplicate account issue to Rob for assistance.
- Joe to present the new online registration process proposal to AAC and DA for approval.
- Joe to add text to the online registration form asking patrons if they're sure they want to proceed with getting a new card.
- Joe to create a list of acceptable ID documents for the new online registration process.
- Joe to update the phone listing for all heads of circulation.

Summary

Team Introductions and Updates

In the meeting, Kayleigh and Sylvia introduced themselves to the group, with Kayleigh mentioning her recent move to Troy and her new role. Kayleigh also shared that she and her team are ahead of schedule despite frequent closures for HVAC work.

Rob to Explore Preferred Name Search

Rob agreed to look into making the preferred name field searchable, a request that had previously been met with an unsatisfactory answer. Emily explained the current workaround of using the preferred name in the name field and the dead name in the notes field, which can be confusing. Sylvia agreed with Emily's suggestion and mentioned that they had been advised to consider dead names as birth names that have been changed from.

Adding Guardian Field to Patron Record

Kayleigh proposed adding a 'guardian' field to the patron record, separate from the existing 'note' field, to make it easier to identify guardians for minor patrons. The team discussed the possibility of customizing the patron record to include a 'guardian' field, with Rob suggesting that it could be done by adding more note fields. Kayleigh agreed to look into it further and suggested a follow-up discussion.

Duplicate Account Search Strategies Discussed

Emily sought advice on searching for duplicate accounts by notes in the system. Rob suggested using the 'Create Lists' feature to search by specific terms in the notes, which could then be exported to Excel for review. Rob also mentioned the possibility of Joe writing a report to pull out these records. Emily confirmed that the duplicate report only pulls up records with the same name and birthday. Rob offered to assist Emily further by examining her specific problem. Emily also shared her ongoing issue with a patron who keeps getting new cards for her kids, often changing their last name or birthday.

Online Registration System Security Concerns

Joe proposed a new online registration system that would require patrons to submit a photo ID and consent form. The ID and consent form would be stored in a temporary database and deleted within 48 hours of approval. The system would allow libraries to verify the authenticity of the ID and approve the registration. However, Sylvia expressed concerns about the security implications of storing ID documents and the potential pushback from patrons.

Online Library Card Registration for Minors

Sylvia and Joe discussed the issue of children under 13 registering online for library cards, which is against the law. Joe explained that the new system will require patrons to authenticate themselves before getting access to online resources like Overdrive and Hoopla. The process involves a notification to the library when a patron registers online,

and the library staff will verify the information and update the Sierra record. The patron will then be contacted with their official barcode and a physical card will be provided. This new system will be discussed at the AAC and presented to the DA in June.

Missed Notifications and Library District Accuracy

Pam and Joe discussed the process of handling missed notifications and the potential for patrons to select the wrong library district. Joe proposed keeping an eye on missed notifications and possibly programming reminders. They also discussed the issue of multiple registrations and the need to verify the library district of patrons. Sylvia raised a concern about the accuracy of patrons' self-selected library districts and the potential for errors. Joe acknowledged the issue and suggested a possible solution involving the use of a message field in the patron record with a "greater than" sign and the library name.

Multiple Library Card Requests Discussion

Sylvia discussed the issue of multiple library card requests, often due to card expiration or loss. She mentioned that they try to merge or update the longest-standing account while deleting the online request if no changes have been made. Pam and Rob agreed that this issue is not a significant problem. Kayleigh suggested adding a question to the online form to prompt users to check for their physical card before proceeding. Rob acknowledged the issue of multiple entries and the potential for abuse, but did not propose a solution. Kayleigh suggested looking at other libraries that offer online access to materials, such as Brooklyn, Queens, and New York Public Libraries.

Online Registration Program Discussion

Joe discussed the online registration program, which uses Geocodio to verify if applicants live in Albany or Rensselaer County. Joe mentioned a glitch in the system, as part of the service area is in Greene County, but Lisa (director) is okay with it. Joe also discussed the issue of patrons with Schenectady addresses in Guilderland, which is a challenge to sort through. The team agreed to use Geocodio for the online registrations, with Joe adapting GUIL's registration program. Qin offered to help with any questions about patron registration. Emily raised a concern about people's driver's licenses not having their current local address, but Joe clarified that an ID document showing residency in Albany and Rensselaer County is required.

Library Card Verification and Payment Issues

Joe discussed the verification process for library card applications, emphasizing the need for local address verification using documents like utility bills. Emily clarified that the verification process doesn't require a specific ID, but rather a document with the local address. Pam suggested that if applicants refuse to provide the necessary documents, they should be directed to their local library. Joe also brought up an ongoing issue with e-commerce payments, where Paypal sometimes collects multiple payments for the same transaction, causing discrepancies in Sierra's records. Joe has been working with III and Paypal to resolve this issue, with some improvements made recently.

New Circ Head at TROY

Kayleigh, the new head of Circ at Troy Public Library, introduced herself and shared her background. Joe committed to updating a document with the latest phone listings for the Circ contacts at the libraries. Kayleigh confirmed that she was receiving the necessary circulation emails. The conversation ended with a positive note and a plan to reconvene in June.