

Summary of Circulation Advisory Council meeting 10/1/2025 (edited by JT)

Quick recap

The group discussed library card policies and procedures for handling non-resident patrons, including authentication methods and access to physical and digital resources across different library districts. They agreed on new guidelines for issuing Upper Hudson Library System cards to non-residents while emphasizing the need for patrons to register at their home libraries for full access. The team also addressed technical challenges with the implementation of the new Vega Discover catalog system, particularly regarding patron record verification and address validation issues.

Next steps

- [Joe to send an email to the circulation list explaining the recommendation about UHLS cards and local library cards, including patron and staff education guidelines by the end of the week.](#)
- [Joe to create a one-page document outlining the process for handling non-resident patron registrations.](#)
- [Joe to continue the greater than sign process for now and discuss it at the next meeting.](#)
- [Joe to create a report identifying UHLS cards and their assigned libraries as a backup check.](#)
- [Qin to share the GIS mapping tool link used for determining patron service areas.](#)
- [Libraries to continue using the greater than symbol in patron notes to communicate about non-resident registrations.](#)
- [Joe to follow up with Triple I regarding the patron record ingestion issues for Vega Discover.](#)
- [Libraries to potentially clean up bad patron addresses once Joe confirms requirements with III.](#)
- [Kayleigh to request more UHLS cards from Joe by emailing \[support@uhls.org\]\(mailto:support@uhls.org\) as needed.](#)

Summary

Library Card Registration Best Practices

The group discussed best practices for registering non-residents and re-registering patrons who move between library districts. Kayleigh raised questions about library card barcodes and access to online resources, which Joe addressed by explaining that barcodes no longer significantly impact access to online subscriptions. Sylvia shared a report created by Catherine that detailed how different databases authenticate users, highlighting the complexity of the issue. The discussion concluded with a brief overview of how libraries handle situations where patrons want to keep their existing library card when moving to a different district.

Library Card Policy Standardization

The group discussed library card policies, particularly regarding out-of-system patrons. Sylvia explained that while most patrons can use their home library cards, a few require Upper Hudson cards. Kayleigh suggested using Upper Hudson Library System cards as general non-resident cards, with patrons responsible for obtaining full access cards from their home libraries. Qin clarified that Guilderland Library distinguishes between local and non-local patrons, issuing Upper Hudson cards for non-residents. The group agreed to define a common definition for out-of-system cards and discussed using the greater than symbol in patron records to indicate specific library affiliations.

Library Card Access and Authentication

The group discussed library card access and authentication issues, particularly focusing on how different libraries handle non-resident patrons. They clarified that while Upper Hudson Library System (UHLS) cards provide access to physical items across all member libraries, they do not grant access to e-resources or Library of Things unless the patron has a barcode from their home library. The discussion revealed that Bethlehem library barcodes are specific to their database access, and non-residents cannot receive Bethlehem barcodes. The conversation concluded with an agreement that while patrons should have access to physical items across the system, clearer

guidelines are needed for handling non-resident library cards, particularly regarding e-resource access and patron education.

Non-Resident Library Card Procedures

The group discussed library card policies and procedures for handling patrons from different service areas. They agreed that when a patron from outside the library's area requests a card, staff should issue a non-resident card and add a note in the patron's record indicating their home library. The discussion touched on how to handle online access for non-resident patrons, with Kayleigh suggesting that patrons could request to have their accounts transferred to their home library when they want to use online resources. The group also briefly discussed using geographical software to determine a patron's correct library service area based on their address.

Library Card Eligibility Verification Process

The group discussed the process of determining which library card patrons should receive based on their geographical location. Kayleigh and Qin explained their use of GIS databases and online mapping tools to verify whether patrons are within the Bethlehem School District or Upper Hudson area. Qin detailed her thorough verification process, which includes cross-referencing multiple sources and contacting the tax office when necessary. The team agreed to share the link to the online mapping tool, and Pam highlighted the importance of using physical maps as a secondary verification method.

Library Registration Code System Review

The group discussed patron address verification and library registration codes, particularly focusing on Pcode4 which indicates physical residence location rather than library district. Sylvia explained that some residents pay Bethlehem taxes but attend RCS schools, creating confusion with the current coding system. The discussion revealed that Pcode4 doesn't affect database access or services, leading to questions about its purpose and potential need for reform. The conversation ended with an open question about how to handle registrations for patrons who come into one library but live in another library's service area, with no clear recommendations established.

Library Card Access Policy Update

The group discussed library card policies and access to e-resources. They agreed that when patrons register at a library outside their home area, staff should issue a generic Upper Hudson Library System card and educate the patron about getting a card from their home library for access to local e-resources. They decided to stop using the greater than symbol for card registration and instead rely on patrons to register at their home libraries. Joe agreed to create a one-page document outlining the new policy and send it to Circ staff. The group did not set a strict deadline for implementing the changes, but agreed to start using the new policy immediately.

Non-Resident Library Card Policy Updates

The group discussed the handling of non-resident library cards, particularly the Upper Hudson (UHLAN) cards. They agreed to eliminate the use of the greater than symbol and instead always issue UHLAN cards to non-residents, with a warning that full library services require registration at the home library. Kayleigh suggested creating a report using the first five digits of UHLAN barcodes to track non-resident registrations at other libraries, which would help address Kirsten's concern about monitoring RCS patrons registering elsewhere. The group also discussed the importance of correctly setting patron types and home libraries when creating UHLAN cards.

UHLAN Card Process for Non-Residents

The group discussed the handling of UHLAN cards for non-resident patrons. Joe explained the process of assigning UHLAN cards with specific library codes, while allowing patrons to change their default pickup location. The team debated the use of the greater than symbol for non-resident patrons, with Sylvia and others expressing concerns about its removal. Joe agreed to send an email to the circulation list summarizing the decisions and recommendations, including the continuation of the current greater than symbol process for now.

Vega Discover Patron Record Challenges

The team discussed patron attribute mismatches and the need for a new report to help verify UHLAN card assignments. They reviewed database authentication methods, with Sylvia noting that Kanopy and OverDrive use patron record numbers, while Hoopla requires both barcode and patron agency. Joe announced the launch of Vega Discover, the new catalog system, though there are ongoing issues with ingesting patron records due to bad addresses. The team was informed that approximately 97,000 records have bad patron addresses, and while most can be fixed, even one bad record can halt the ingestion process, creating a significant challenge for the implementation of Vega Discover.