

Circulation Advisory Council minute - June 3, 2026

[Zoom Summary, edited by Joe]

In attendance: Rob Carle (UHLS), Joe Thornton (UHLS), Sylvia Taylor (BETH), Pam Jacobson (SNLK), Kirsten Heller (RCSC), Sarah Kerr-Mace (MEND)

Meeting summary

Quick recap

The meeting focused on two main agenda items from Sylvia regarding issues with the Sierra paging system. The first question addressed why frozen items appear on paging lists, with participants noting they hadn't noticed this pattern and agreeing to consult III for clarification. The second issue discussed was item-specific holds being changed to bib-level holds by other libraries, particularly from Pine Hills and Albany libraries, which creates extra work for staff managing collection changes. The group also discussed implementing patron messages for out-of-system borrowers, deciding to add library-specific messages to each out-of-system patron record to alert staff when these patrons attempt to check out at other libraries. Participants agreed to use a generic message format including the library name to make the system easier to use and understand.

Next steps

Joe

- Contact III to inquire why frozen items are appearing on the Sierra paging list.
- Send an email to Circ staff requesting that they do not change item-level holds to title-level holds for items they do not own.
- Monitor feedback from libraries after the new patron messages are implemented; if issues arise, be prepared to remove the messages.
- Send a reminder or update about the next meeting date in July.

Sylvia

- Track instances where item-specific holds are changed to bib-level holds by other libraries, to gather more data if the issue persists.

Collaboration

- Joe (or UHLS team): Insert a library-specific patron message into every out-of-system patron record, indicating the library where the card is registered (e.g., "Bethlehem checkout only"), so that the message pops up at any library when the patron's record is accessed.

Summary

Frozen Items Paging List Discussion

The meeting began with Joe apologizing for not posting agenda items from Sylvia earlier. Joe then shared his screen to discuss two questions from Sylvia, starting with why Sierra puts frozen items on the paging list. The discussion was cut off at the end of the transcript, so the answer to Sylvia's question about the paging list was not provided.

Frozen Items in Sierra Paging

The team discussed issues with frozen items appearing on the paging list in Sierra. Sylvia explained that frozen items require extra work when searching for specific items, as they won't fulfill requests for an extended period. The group also discussed the use of suppression, with Rob clarifying that it prevents items from displaying in the OPAC but may not affect their appearance on paging lists. Joe mentioned an alternative solution, the [Bib level requests \(for pickup at other libraries\)](#) Ad Hoc, which he created after Covid to address unfilled holds, though he noted it doesn't display suppressed or frozen items.

Bib Level Requests Report Overview

Joe explained the purpose of the Bib level requests report, which was created to recover library requests that went into limbo during COVID closures when Sierra would page items four times before marking them unfilled. Kirsten confirmed they use both this report and the Sierra paging list without major issues, experiencing fewer than five problematic items occasionally. Joe noted that the report doesn't accommodate non-request loan rules, which may be a limitation compared to the Sierra paging list.

Sierra System Loan Rules Discussion

Joe and Sylvia discussed issues with loan rules and paging lists in the Sierra system. They clarified that items with non-requestable loan rules would not be eligible for request and would return to the shelf. Sylvia raised concerns about items being paged multiple times before going into limbo, and Joe confirmed that this behavior would depend on the specific system settings. The team agreed to investigate with III about patrons freezing holds and to determine which reports other libraries are using to identify unfilled holds for item-specific changes.

Library Hold Management Issues

The team discussed issues with libraries changing item-level holds to bib-level requests, which affects hold management and tracking. Sylvia explained that this sometimes happens when items are in Billed status, and she has noticed a few recent instances where other libraries made these changes. The group agreed this practice should be

curbed, with Sylvia offering to track when these changes occur, and Joe suggesting he could send an email to Circ staff requesting they avoid making such changes in the future.

Library Borrower Management Discussion

Joe and Sylvia discussed two main topics regarding library borrower management. First, they clarified that Sylvia's library staff currently doesn't regularly monitor Out-of-System borrower reports, though Sylvia will investigate further. Second, they addressed a misunderstanding about implementing a pop-up system for Out-of-System borrowers at non-home libraries. Joe explained that while he could configure loan rules to generate a pop-up message when out-of-system borrowers try to checkout items, this would use the same message that appears for reference materials and library-use-only items, potentially causing confusion for library staff. The conversation ended with Sylvia mentioning seeing a pop-up for one of Joe's patrons that she found interesting, though the details weren't specified in the transcript.

Patron Message System Implementation

Kirsten explained how she added a patron message in the system that displays "RCSC checkout only" with a yellow triangle warning icon when patrons scan their cards. The group discussed the pros and cons of using patron messages across different libraries, noting that while this approach works for limiting checkout at specific locations, it could create confusion when patrons visit multiple libraries. They concluded that the current method of adding specific messages for each out-of-system patron record might be the most viable solution for now.

Patron Message Implementation Discussion

The group discussed implementing patron messages for out-of-system and temporary card holders to prevent checkout issues across different libraries. They agreed to add library-specific messages that would pop up when these patrons attempt to check out at other libraries, with the messages including the specific library name. Joe will implement this system, starting with library-specific messages rather than generic ones, and the group will evaluate if the messages cause problems before making changes. The next meeting was confirmed for July 1st.