

## Resource Sharing Working Group

Date: Thursday, November 1, 2012

Next Meeting: Monday, December 10, 2012 (2:00 to 4:00PM)

Recorder: Hollin Elizabeth Pagos, Lynnfield Public Library

### Agenda:

1. Introductions
2. Select a recorder
3. Impetus of new working group
4. Select a chairperson
5. We're not in Millennium anymore—differences in overdue and billing concepts in Evergreen
6. What is desired?
7. Meeting schedule

## Meeting Notes

### Why Are We Here?

The Resource Sharing Working Group was formed to look at policies and development issues relating to Circulation and Resource Sharing. Generally, policies are determined by NOBLE directors, but decisions are informed by working groups such as this one. Any time there is a new system, policies need to be revisited and revised to account for changes in the new system's functionality. Additionally, it is worthwhile to revisit policies because interpretations of existing policies tend to vary over time from library to library. So... we're going to look over policies, development projects, and other procedures and provide suggestions for improvement. But first...

### Who Wants to Chair This Group?

Interested? Contact Ron.

### "The Billing Situation"

- In Millennium, billing was fairly comfortable after 10 years—email notifications, scheduling flexibility, options for different libraries, easy to tell when a patron had a billed item (on both the staff and patron sides), etc.
- Enter Evergreen. During the migration, the Millennium billing schedule was applied to Evergreen, which quickly became problematic ---> BILLING SUSPENDED!
- Some of these problems include:
  - Billed items no longer appear in the "Checked Out" box.
  - Billed items do not appear checked out in the patron OPAC view.
  - To void or not to void item refunds through Evergreen.

- Patron credit is added to the account if a billed item is returned after it has been paid for or forgiven. This results in negatives balances on the patron's card, which are complicated to remove and are confusing to the patron.
- Essentially, Evergreen treats billed items as though they aren't going to come back except in very unusual circumstances. We're used to working with Millennium, in which billed status didn't have as many quirks and we were able to use it as a motivator for patrons to return their items.

## Where To Go From Here

Questions posed by NOBLE staff included:

- What types of information do we want to see on the staff client side when a patron has a billed item? Pop-ups? Account blocks?
- Will our decisions be library-specific, consortia-wide, or will we have one procedure for academic libraries and another for public libraries?
- How long should an item be overdue before denying checkout to that patron?
- At what point do we assume an overdue item is not going to be returned?
- When an item is long overdue, should the patron be able to renew it?
- What should a patron be able to do with their account when they have long overdue or billed items? (Not check out? Not place holds? Reserve computer workstations? Database authentication? Overdrive?)

## Our Toolbox

Without major development projects, the following options and tools are available to us:

- Pop-up alerts on patron account to notify staff that a billed item exists.
- Account Blocks (Blocks are currently set at \$50.00, unrelated to whether or not that patron has long overdue or billed items.)
- There is a permission setting that allows certain staff to check in lost items without adding credit to a patron's account.
- Patron notices can be generated separately from marking items as billed. These notices can include the value of the overdue item.
- There is an option to tell the system how long money can be reimbursed for.
- "Long Overdue" status can be used as an intermediary step between Overdue and Billed. There are potentially fewer complications in removing items from "Long Overdue" status.

## Some Nuances

- Some libraries like to take a more threatening, active approach to billing to encourage patrons to return their items. Other libraries like to take a more gentle approach and send out multiple notices before marking an item as billed. Luckily, in Evergreen notices can be generated separately from whether or not the item is actually changed to a billed status.
- Libraries have different perspectives on how long an item should be overdue before blocking access to that account: some libraries say 60 days, others 6 weeks, others 6 months. Some libraries have mixed rules depending on whether or not the item has holds or who the owning library is. Some academic libraries prefer to mark billed

items all at once during a chosen point in the semester. Academic and public libraries tend to have very different perspectives here because of the different rates of patron turnover and the different year structure (calendar or fiscal vs. semester).

### **Suggestions from Group Participants**

- Not set items to billed status so quickly; reserve billed status for situation in which we are fairly certain we're not going to get an item back, not as a motivator for returning overdue items. Use "Long Overdue" status the way we used to use Billed status, and only mark something Lost when a patron is ready to pay for it.
- Mark items as "long overdue" after they are overdue for 6 weeks; mark items as "billed" when they are overdue for 6 months.
- Patrons should not be allowed to renew items that are long overdue.
- Keep virtual resources separate from physical resources—long overdue and billed items should not prohibit access to ebooks, online databases, or computers. Actually, encourage people who can't return books on time to check out ebooks!
- Create a yes/no option to generate a refund when billed items are checked in.
- Determine a way to distinguish between bills fulfilled by cash or by replacements.
- Make billed items appear in the "Checked Out" screens on both the staff and patron account views.

### **The Elephant in the Room: What is the advantage of billing anyway?**

#### **Final Suggestion**

Not use "Billed" status at all unless a patron is literally paying for the item. Instead, use "Long Overdue" the way we used to use "Billed" in Millennium. We can still generate overdue notices (including the value of the item) and block certain patron activities when items are long overdue. Set long overdue status library by library.

Martha and Michele will look into possibilities associated with "Long Overdue" status and report back to us at the next meeting.