

## **Resource Sharing Working Group**

Date: Monday, December 10, 2012

Next Meeting: Monday, February 11, 2013 (2:00 to 4:00PM)

Recorder: Tricia Arrington, Peabody Institute Library, Danvers

### **Agenda:**

- Choose a note taker for today as well as going forward
- Long Overdue billing process and options – Update from Martha and Michele
- Consistency in applying billing processes
- Coming resource sharing developments
- Schedule upcoming meetings

### **Notetakers:**

It was decided that the duty of recording the minutes will be shared and that we will proceed in alphabetical order.

### **Update from Martha and Michele:**

In response to our request from the last meeting, Martha and Michele presented a patron block that they are working on to prevent a patron from checking out items after they have an item that is long overdue. Currently in Evergreen there are some blocks already in place e.g. if a patron's card has expired, if they owe too much money. The system queries the database when a card is scanned and if the patron meets one of the criteria then it will then block them from checking out.

The block that Martha and Michele presented would block a patron if they had an item that was 42 days overdue. The block would prevent the patron from being able to check out, renew items or place holds on their account. For staff it would trigger an alert message. If staff tried to checkout, renew or place a hold on the patron's card, they would receive another message that they would have to override if they wanted to proceed. We could tie that override to a certain permission group if desired.

### **Consistency in applying billing processes:**

- The group discussed and decided to make it a universal block, so that no matter which library you were in, a patron with an item that is overdue more than 42 days would be blocked. Some of the colleges are worried that they may not see some of their patron's after a semester, so they want to get their items back.
- The issue of notices came up and the question was asked if a patron reached this point, would they receive a notice. Martha explained that we could set it up that way, but that the

overdue notices are independent of the block. Every library has their own schedule for notices. As discussed in the last meeting, libraries can set up notices that look like bills, but the item isn't actually billed in the system.

- Someone asked if a staff member could delete the block. The answer is yes, they could delete it, but that the next time the card was scanned the block would be reapplied.
- Currently, if the number of allotted renewals has not been reached, a patron can renew an item even if it is a year or more overdue. Someone asked if there was a way to prevent this. Martha asked if we would like to not allow renewals after a certain number of days after the due date. The consensus was yes.
- We can run reports of the patrons who have this block. We can also run reports of patrons with overdue items or money owed.
- Martha asked if we would like any indication on the item itself that it is long overdue. The consensus was that we would like the status to be changed to long overdue as long as that doesn't put the item in the "basement" with lost & paid and claims returned.

#### **Coming Resource Sharing Developments:**

- Elizabeth encouraged everyone to go to the UserVoice and MassLNC sites and vote on development ideas. The NOBLE development committee looks at those sites to help set priorities for development.
- Elizabeth raised the issue of whether or not we should reinstate the number of remaining renewals column in the patron's record with some text to explain that they may not be able to renew if someone was waiting for the item. Should we leave it off? Should we pursue development to make that a more dynamic feature.
- Elizabeth talked about some development ideas and development in the works. One issue she brought up was the idea of automatic renewals. There are a lot of billing issues being discussed many of them related to the negative fines.
- Holds go home is in the works and should be ready sometime this summer. Ron mentioned that they are currently testing an Evergreen/Equinox Virtual Catalog type project that is currently being tested. Development is also in the works that would help us customize the order in which holds are captured. Currently Evergreen favors the patron at the pickup point.
- Someone asked about whether "group formats and editions" would ever be put back. Elizabeth explained that some of the issues that were a problem such as giving you an audiobook when you wanted a print book have been fixed making it more feasible.

**Schedule upcoming meetings:**

Martha and Michele are going to continue working on the block and then figure out a way to change the status to long overdue. Sometime after the new release, they will send us an email to see if the members like the way it turns out and then we will begin a trial period. When we meet again in February, we will have had the system in place for bit of time, so we can determine if it is working well.