

TLN Circulation Services Committee
May 10, 2018
Chelsea District Library

Jonathan Deahl (WATE) called the meeting to order at 9:30 AM

Introductions

Approval of Agenda: Becky Willemsen (MDHT) moved to approve the agenda with a second by Kelly Bennett (FERN)

Approval of Minutes: The minutes were amended to correct the spelling of Becky Willemsen's name on Page 1. A motion was made to approve the amended minutes by Terri Lancaster (CHEL) with a second by Kim Sharp (WHLK).

SASUG Update: Brigette Felix (TLN)

The system update from the March SASUG meeting can be accessed through <http://tln.lib.mi.us/sasupdates/default.aspx>. There was no April SASUG meeting. Reminders were given regarding:

- a) Due to the migration, responses to non-urgent help desk tickets may be delayed
- b) Let TLN know (via a help desk ticket) whether you want to receive delivery during migration
- c) There was a calling tree test on May 8th. Ninety-four percent of the libraries got the message. However, not all the libraries who were last on the list faxed TLN. Please remember to do so if you are at the bottom of the list

OLD BUSINESS

Handling library account when patron has declared bankruptcy – Becky Willemsen (MDHT) commented that library material is not covered by bankruptcy. Libraries must waive overdue fines but can still collect for outstanding materials. Libraries can't contact the patron but can put notes on the patron record stating the bankruptcy date. Replacement fees for materials can stay on the patron record. If the material belongs to another library, it's best to contact the owning library and find out how they want it to be handled.

NEW BUSINESS

1. **Nominations and election of officers for 2018/2019** – Kelly Bennett will be the Chair for the 2018/2019 meetings. We still need a Chair Elect who will become Chair for 2019/2020. Responsibilities for the Chair include: putting the agenda together for the meetings, emailing the circ list serve for additions to meeting agendas, coordinating equipment for remote attendance and sending approved minutes to TLN. We are also in need of a secretary or co-secretaries for 2018/2019. The committee cannot meet and will have to be dissolved if there is no secretary.
2. **Selection of 2018/2019 meeting locations** – the following dates and locations are set
 - a) November 8, 2018: Bloomfield Township
 - b) January 10, 2019: Huntington Woods
 - c) March 14, 2019: Salem-South Lyon
 - d) May 9, 2019: Auburn Hills

e) September 12: Canton

3. **How to handle returned mailers and change of address forms** – It appears the best suggestion was to expire the card and put a note in the note field. This way, the patron is forced to come in to update their card. It's best not to delete the card as that will also remove all loan history
4. **Limiting patrons to one card per person in the system:** The general opinion was that patrons should only be allowed to have one card in the system and that card should be from their home library based on residency – with the exception of teachers. Business patrons should be entered as SASGUEST. Overdrive is only accessible to residents. Some property owners want double cards but most thought the patron should have to choose one library as their home library. It was suggested that libraries could use different color cards to identify different patron types.

SYSTEM UPDATE/CARL X MIGRATION UPDATE (CELIA)

1. All migration documents are posted on the TLN website including the glossary of Carl terms
2. If patrons want to opt into the Saved List feature on the website there should be a disclaimer. This information will only display in the catalog patron record not on the staff side
3. Be sure to change the patron's home library if they move
4. In Carl, patrons may choose their preferred library for holds. Not sure if this will have an impact on future holds placed by the patron
5. When registering a patron, you must enter home library, municipality and gender
6. Soft blocks will be used for bad email addresses, incorrect birthdates, etc. These will not prevent the patron from checking out
7. Hard blocks are for fines and fees and may prevent the patron from checking out
8. At this point TLN is not sure if or how the information contained in patron records on the "line" line, notes and comment lines will transfer
9. Alt ID is unique in Carl as it was in Workflows
10. Staff is not able to see a patron PIN in Carl, you can only change it
11. Pre migration use the password Train to do overrides. There will be a new password after we go live
12. PINs in Carl must 4-6 characters in length and must only include numbers. If a patron has such a password in Workflows, it will not change. If however, their current PIN does not meet this criteria, their PIN will be changed to the last 4 digits of the phone number in their patron record. If there is no phone number in the patron record, their PIN will be changed to 9999. All new cards issued will have the default PIN of the last 4 digits of the phone number
13. Text message information will not transfer from Workflows. In Carl, patron must give carrier information and opt in to receive texts. Text is always in addition to email. Texts will be generated for "coming due", the day the item is due and hold notices.
14. There will be no paper mailers for holds
15. If you suspend holds, the suspension date always starts immediately
16. Missing, withdrawn, in process, damaged, etc. are considered statuses in Carl. There will be no internal cards for these
17. When registering patrons, if you enter the patron street address, the city and zip code fields will populate
18. Fine history will be lost in the migration

Thanks to Becky for sharing her training manual. Everyone was very appreciative of the help.

If anyone needs a name tag for meetings, email jdeahl@waterfordmi.gov

ADJOURNMENT

Patti Davies (SLYN) made a motion to adjourn the meeting at 12:20. The motion was seconded by Diana Pierce (BRIT)

Next meeting to be held at Thursday, September 13, 2018 at 9:30 AM at Commerce

Respectfully submitted
Judy McIntosh (NORT)

ATTENDANCE

Jonathan Deahl (WATE)
Megan Drozan (FMTN)
Gloria Finzel (FMTN)
Rita Otzman (WAYN)
Amy Viergutz (CANT)
Jeanine Gillikin (CANT)
Elizabeth Alexander (LIVS)
Patti Davies (SLYN)
Linda Tingley (AUBN)
Brigette Felix (TLN)
Dawn Chlebo (MILF)
Bill Wines (COMM)
Kathy Dimond (MANC)
Lynda Wiltse (TREN)
Mary Graulich (DEXT)
Tiffany Dentamaro (ROMS)
Judy McIntosh (NORT)
Kathleen Mintus (HIGH)
Kim Sharp (WHLK)
Tina Russette (CLAW)
Kelly Carter (ROAK)
Kelly Bennett (FERN)
Sally Kohlenberg (HTWD)
Kim Oakley (ALPK)
Colleen Tabaka (TAYL)
Becky Willemsen (MDHT)
Tamara Denby (MANC)
Sandy Jaslow (REDF)
Marion Reed (HIGH)
Terri Lancaster (CHEL)
Lynne Severini (GRPT)
Tina Fleischmann (BRIT)
Diana Pierce (BRIT)
Melanie Bell (CHEL)

Celia Morse (TLN)
Alta Moore (LYON)
Pam Quackenbush (LYON)
Kristen Tait (BALD)

