

Combined MCRC/MILC Meeting April 10, 2001

Mary Jo Barbush-Weiss (UMR) chair of MCRC and Resa Kerns (MU-Law) chair of MILC presided.

Present: Mary E Anderson (UMKC-MNL), Mary Jo Barbush-Weiss (UMR), Doris Beeson (SLU-Pius), June DeWeese (UMC-Ellis), Alice Edwards (UMC-HSL), Tammy Green (UMC-Ellis), Gary Harris (MCO), Annette Howard (UMR), Barbara Hufker (UMSL), Resa Kerns (MU-Law), P.J. Koch (SLU HSC-ILL), John Meyer (UMC-Ellis), Kathy Mullen (SLU-HSC), Christine Robben (UMKC-MNL ILL), Larry Ruzich (UMKC-MNL), Mary Ann Samson (SLU-Law), David Shocklee (SLU-Pius), David Snead (UMSL), Mary Wood (UMC-Ellis).

A. Combining MILC and MCRC

Resa Kerns, present MILC Chair met with the MERLIN Directors a few weeks ago, and they were in agreement with our plan to combine the two committees. They would like a formal proposal that gives details of what we have done to combine the committees. The following points were discussed and agreed upon by all members.

1. Meeting Times

The committee will continue to meet once a quarter as MCRC has in the past: January, April, July, and October. One meeting a year will call for ILL issues. During that meeting, the ILL agenda will be discussed in the morning. ILL issues will be discussed on the listserv or will be introduced to the agenda for other quarterly meetings ahead of time to allow ILL representatives to attend.

2. Chairs

The committee unanimously agreed to have one chair for the combined committee. Mary Jo Barbush-Weiss was re-elected to be the chair from July 2001 – June 2002.

3. Voting

In accordance with MERLIN Committee Structure Guidelines we will have 1 vote per campus.

4. Listservs

MILL-L and MCRC-L will be combined into one listserv. MCO will save an archive file of MILL-L.

ACTION ITEM: Ask MCO to archive MILL-L and to subscribe MILL-L subscribers to MCRC-L.

5. Name of Committee and Committee Charge

The committee would like to change its name to MERLIN Access Services Committee (MASC) to better reflect the combination of Circulation/Reserve/ILL issues.

ACTION ITEM: Mary Jo Barbush-Weiss will submit to Fran Benham, Chair of MERLIN Library Directors, a formal proposal to combine MCRC and MILC and will include in the proposal the suggested name change.

June DeWeese volunteered to draft a charge for MASC. This charge will be discussed by committee members on-line.

B. MERLIN home library location for ILL institutional patrons (ptype O)

Many ILL patron records that have a ptype of “zero” (e.g., a patron would be Harvard Business School or Mid Continent Public Library) are utilized by SLU, UMC, UMSL, and UMR* and have a non-existent default home library of zzzzz. Gary Harris suggested that we create a unique home library location for ILL records of meill. He created a test ILL record to which the Ellis library staff has agreed to check out items. If this record works properly, we will rapid update all the ptype 0 (zero) ILL record to change their home libraries to meill.

*Please note: UMKC – MNL checks out ILL items to a general UMKC ILL record on MERLIN and to individual libraries on CLIO. MNL does not use ptype 0.

C. Encouraging/Requiring Patrons to use MOBIUS instead of ILL - from the MAAC 4/24 agenda

MAAC suggests that each MOBIUS library encourage its patrons to use the request function in the MOBIUS Union Catalog to order items whenever possible instead of the libraries having to order items through their ILL Departments/OCLC. Some suggestions that were offered by MASC members:

- Suggestions were made to place bookmark size notes in ILL items that could have been ordered directly through

the MOBIUS Union Catalog. The bookmarks would explain how the patron can order directly through the request function in MOBIUS and would state that the turn around time is much faster.

- SLU Pius and MU Ellis have instituted a procedure by which they order items directly through the MOBIUS Union Catalog in their patron's name when a patron submits an ILL request for an item that is owned by another MOBIUS library. MU Ellis' staff send a note to each student stating that their ILL request was cancelled and a MOBIUS request was placed instead.
- UMKC Miller Nichols Library is using the hold function to order MERLIN items for their patrons who submit ILL requests for MERLIN owned items.

The following concerns were voiced by committee members:

- Taking staff time to order these items through MOBIUS goes against Mary Jackson's ILL Best Practice Guidelines.
- What if a page on a MOBIUS item is cancelled? In good faith, patrons have placed an ILL request. ILL requests are placed in a queue in OCLC, and ILL staff are alerted if none of the libraries in the queue are able to fill the request giving the staff a chance to request the item from other libraries. A MOBIUS request can be cancelled and a notice may or may not be sent to the patron depending on the choice made by the staff at the owning library. Even if a cancellation notice is sent, staff at the patron's home library may not realize that the requested item was originally an ILL request, and the patron will receive a cancellation notice that may result in confusion and delay in receiving the requested item.

D. Overrides file

Problem: Currently anyone who can override an overdue item has access to circulation overrides file including the ability to clear that file.

The committee voted to add a separate authorization for accessing the circulation overrides file. Each campus will limit access to the individual workers that they wish to have access to this file.

ACTION ITEM: Mary Jo will ask MCO to make a separate authorization to password protect the circulation override file.

E. Other MAAC agenda items

1. Implementing the Lost Book Policy

a. MERLIN – It was suggested that MERLIN develop a written policy for reconciliation among our own cluster. Each library will decide when to block its patron. MU Ellis will block its patron when told that the patron owes another MERLIN library for a billed book. This year each library will utilize the “print statement of charges” circulation function to print bills for items owed to its library by patrons from other MERLIN Libraries.

S> Statement of charges

A> All patrons

3> Prepare notices for name of owning library

Each library that has items in the depository will also need to choose S, A, and 2 and enter their depository location code (e.g., fkn).

In August of 2001, we will reconcile for items that were due before June 2000 for both MERLIN and MOBIUS.

Negotiations will take place between the owning library and the patron's library.

Items that have been in transit too long will need to be taken out of “in transit” after extensive searching at the campus it was in transit from and the campus it was going to. The owning library can then suppress the item and decide if it should be reordered, etc.

b. MOBIUS – The MOBIUS Lost Book Policy was approved by the MOBIUS Council

on March 23, 2001. Some of the MERLIN committee members continued to express

concern about the section on net loss reimbursement. “7. A system of reconciliation should be investigated so libraries may reimburse each other based on net losses.” How would this work with the UM accounting system? This issue can

be explored in more depth after the UM System is up PeopleSoft.

2. Maximum requests in INNReach - The committee reviewed the March 29, 2001 draft put forth by MAAC. The draft was approved. Those present expressed the desire to choose the option that allowed undergraduates to be able to checkout 20 items. Currently, undergraduates can checkout 10 items, while graduates, faculty and staff can checkout 20 items.

3. Procedures for Damaged Books

a. MERLIN – Continue to deal with each other on an individual basis.

b. MOBIUS – Mary Jo suggested that committee members check the contact list on the MAAC Homepage and deal with library contacts on an individual basis.

4. Request balancing table – ACTION ITEM: Mary Jo will suggest to MAAC that the request-balancing table be reconfigured to balance requests between all clusters.

F. Recalls

1. UMC members stated that they thought the UM Library Directors had okayed recalling items from other UM Libraries. Other UM Libraries thought that we were only supposed to recall our own items for our own patrons. The SLU member stated that they only recall their own items and have a policy of canceling all recalls on their items for non-SLU patrons; they then place holds on for these non-SLU patrons instead. Several UM Libraries want to go with this policy. All members present agreed to utilize the SLU model until Mary Jo is able to put the question to the UM Directors. In any case, all agreed to never recall SLU books.

2. Text of recall notices - No discussion?

G. Holds

1. Item level holds - Patrons cannot place item level holds from the public side. There is a problem when patrons want a specific volume or the bib record is a “bound with” bib. The computer will not always choose the copy the patron wants. MCO may have to explain implications of allowing item level holds versus the option we originally chose of allowing bib level holds only.

2. Broken holds/links dropped - problem lately with holds breaking, links dropped. Cathy Stubbs said that this appears to be related to the Tuesday patron loads. Please continue to send these problems to the MCO Helpdesk .

Please copy MCRC-L when submitting problems to the MCO Helpdesk.

Minutes from the January 10, 2001 MCRC meeting were approved with minor corrections.

Next meeting: July 10, 2001