SWAN Circ Meeting

February 1, 2001
Drury University

Attending: Tracy Sullivan – DU, Esther Siler – SMSU, Shirley Moentnish – SMSU, Coleen Rose – SBU, Donna Young – SBU, Layla Stanek – OTC, Corky McCormack – OTC, Wendy McGrane – MSSC, Gaye Pate – MSSC, Victoria Johnson – DU

Topics Discussed:

1.Problems involved with printing notices and paging slips.

MSSC, SMSU, and OTC (maybe SBU) are all experiencing creeping notices. Some creeping has been constant; some began after INN-Reach was turned on. Wendy spoke with Cathy Stubbs at MCO on 2/5/01 & there is an open call on this problem.

Some felt that ptypes were printing at the bottom of INN-Reach notices & wanted that to print on SWAN notices as well. MCO says that this is the # of the notice – not the ptype. MCO is checking with III to see what charge would be involved to have the ptype spelled out below the patron address on notices. Below is my email from Cathy Stubbs:

Wendy and Phyllis,

Innovative will not program circulation notices for this functionality. My homegrown method of accomplishing this would be to populate manually a x = note field in the patron record for each PTYPE. Then, set that x = note field to print on the circulation notice above or below patron address. Each coordinator could populate their own records, or perhaps by asking MCO, we would take on this special project. The major drawback to this method is that the note field is static and would have to be updated every year. Additionally only the first note field will print so the note fields would have to be ordered properly for the correct field to display on the circ notice.

I am wondering if it is possible for the data centers where these patron files originate to add a note field? I believe David and crew at SMSU already add notes to their patron records.

Please let me know what the next step is.

Thanks,

Cathy

-----Original Message-----

Can we have a drop of 2-3 lines below the patron address & then print the patron ID. Or print to the right of the patron address? Would all libraries be interested in this? Contact MCO – I have not checked on this yet.

2.Browse counts – what is everyone doing?

Those that browse materials are handling this consistently by institutional need.

3.What problems are there with cluster borrowing?

MSSC had to instances of $20 proc fees for items that were billed by MSSC waived by other libraries. It was agreed that only the lending library could waive charges for billed items or proc charges for billed items. It was further (as it has been in the past) that all proc fees/lost book charges must be paid to the lending library – not the patron's home library.

Some libraries are still receiving traditional ILL requests from SWAN libraries. It was reinforced that all book ILL's with SWAN & MOBIUS libraries (that are on III) must be initiated through III and not OCLC.

Many libraries are confused about MOBIUS Circ Stats. Why are we not counting Reserves and ILL's? Don't they all count as transactions? Gaye Pate will bring this up at the next Access Committee meeting.

Some SWAN loans are being received without being set to "In-Transit" by the lending library – these items need to be checked out for this status to be set.

4.How are institutions handling forgotten PIN #'s? For patrons from other SWAN institutions?

Delete field from patron record & allow patron to create a new PIN via webpac. For patrons from other SWAN libraries, delete field from patron record only after seeing the campus ID and a photo ID if a picture is not included on a campus ID.

5.How should we handle patrons created on the fly?

Only add information to your own patrons. Do not check out patrons from other SWAN libraries that have been created on the fly. Refer these patrons to their home library.

6.Are we consistent in entering patron records?

Patron loads coming from other databases (ex. business office) on campus cause the format of some information to vary by institution. SMSU will always have the home address for faculty in the 2nd address field. Please send notices to SMSU faculty at their home address vie US Mail by retrieving their home address from the patron record.

7.Should we address the question of whether or not to suppress the medium of an item on the public screens? What about displaying call #'s?

Call #'s won't display if more than 1 library owns the item – it doesn't know which call # to display.

Display issues are being postponed until a committee can be formed sometime in the spring to address this and other webpac issues.

8.Do we recommend the use of the note field to add item messages such as disk enclosed or 3 parts, etc?

No, David Adams and Corky McCormack are working on creating a list of standard used phrases to be incorporated into the pcode 3 field.

9.Do we want to use a inform book band for cluster loans?

Yes, the one created by SMSU, it may require some internal editing. Use light blue paper for these SWAN loans. Please remember that SMSU has three delivery locations: Meyer, Evans, and Garnett.

10.Do we all require an ID to check out materials? Does it have to be a picture ID? Do we have them for all of our

students?

Yes, an ID is required. If the ID does not include a photo, an additional photo ID must be presented as well as the campus ID.

11. Do we want to adhere to the still-to-be-approved Mobius policy for lost book charges, or stick with the one we formulated in the development process early in 2000?

Everyone agreed that it would be best to follow INN-Reach/Mobius policies as much as possible. Uniform SWAN & INN-Reach policies would help staff and students.

12. How do we want to handle lost item charges due another SWAN library? How do we handle patrons whose primary library is somewhere else in the cluster but who owes us money or library materials?

This was covered by #3 above: It was agreed that only the lending library could waive charges for billed items or proc charges for billed items. It was further (as it has been in the past) that all proc fees/lost book charges must be paid to the lending library – not the patron's home library.

We discussed the possibility of having a cluster entry in the patron block table. Wendy contacted MCO about this, below is Cathy Stubbs' response:

The patron blocking table drives off the PTYPE, and the table already has a block level assigned for almost every PTYPE (except OTC). It is not possible to block on a cluster level because a cluster PTYPE is not designated for each campus.

If your concern is with abuse within the cluster, the fine levels will have to be adjusted among the campuses, by convincing the other libraries that the only way to block uniformly is for each campus to set their tolerance for fines at the same level. A patron with a Drury card can go to a SMSU library and check books out, but all the items accumulate on this one patron record, with limits determined by the responsible library, in this case, Drury.

If your concern is with abuse by patrons using INN-Reach, those blocks are uniformly set for every PTYPE already and cannot be changed.

I was able to confirm with Jim and with a quick survey of the other clusters' Automatic Patron Blocking tables.

Does this accurately address your question?

Cathy

We did not come to any consensus on how to handle students/faculty that owe us money, but whose home library is another institution. This is difficult since each library handles charges in a different way.

13. When do we want to declare that we are not obliged to accept the return of long-overdue materials from a cluster patron and should we have a standardized non-returnable billing charge or fine to cover reordering, recataloging, etc.?

We agreed to follow the INN-Reach policies already established to handle the same SWAN situations. These policies are spelled out in links from the MCO web page.

Other Issues:

- Wendy will contact Robin Kespohl to inquire about a report we all received a couple months ago about bad home library codes on patron records. This is a copy of the email.

Robin,

Last November you sent some statistics to the SWAN institutions regarding bad codes in patron's records. At the recent SWAN Circ meeting we discussed these briefly. A couple libraries had done some cleanup, but others were unsure what needed to be done. Would you revisit this issue via email with the coordinators and/or circ contacts? Let us know how things look now, if we should be doing more clean up, and if we need to develop a schedule for ongoing patron record maintenance.

Thank you-
WendySent 2/20/01

- Some libraries were trying to clear expired holds from the Outstanding Holds list only to have them reappear on this list the next time they went into that screen. These libraries will contact the MCO Helpdesk to figure out why this isn't working properly.
- We agreed that the patron borrower statement should be added as a link from SWAN that all institutions could use. Wendy will contact MCO to check into this possibility after getting feedback from the list.

The SWAN Circulation & Coordinator committees would like to have a link available - perhaps as a pop-up window - that provided some very basic information to our users about cluster borrowing. The exact location, etc. of this information will need to be worked out with MCO, but we would like feedback on our proposed statement. Please reply to the list, or to your institution's coordinator. Thank you.

Important Borrower Information

The ability to borrow materials from SWAN/MOBIUS libraries can be of enormous benefit to library patrons. However, with this benefit comes certain responsibilities. Patrons are responsible for safeguarding all library materials that are checked out. If a patron lends library material to a third party, the patron who checked out the material is still responsible for its safe and prompt return.

The minimum replacement cost of damaged/unreturned SWAN/MOBIUS library material is $120 per item. If the patron incurs charges for damaged/unreturned materials, the patron may be blocked from borrowing at his/her home institution library as well as other SWAN/MOBIUS libraries. Once charges have been cleared, the patron's borrowing privileges may be reinstated.

Sent to mobsw-1 2-20-01

- Pmessages for email addresses were discussed. SMSU did not want this feature if it meant that everyone patron record would require an override for this message. At the Coordinators meeting the following week, this was discussed & agreed upon (that we would have pmessage options) because they can be added to an institutions records using the create list function.
- It was the consensus that Gaye Pate (MSSC) should continue to chair this committee since she is the cluster representative to the Mobius Access Committee.
- Meeting minutes will be taken by each member on a rotating basis.

The next SWAN Circulation meeting will be held at Drury University Thursday, March 29th at 9:30 a.m.

Minutes submitted by Wendy McGrane (MSSC) February 20, 2001
Minutes will be forwarded to the MCO Helpdesk to be linked on the web.