

Missouri Evergreen Circulation Committee

Meeting Minutes for Tuesday, February 22nd at 11am

I. Public Comments

- A. ME Executive Director Mickey Coalwell shared that there will be a series of regular monthly meetings set up between ME, MALA and the State Library to discuss courier issues. Please continue to report any courier issues to the MALA reporting form which is linked to on the homepage of the Missouri Evergreen website and reach out to Mickey as well as needed.

II. New Business

- A. Adding Spanish translation option to the Catalog. The example from the Scenic Regional test server was shared and discussed:
<https://scenicwashington-test.missourievergreen.org/eg/opac/home>
 1. Consensus is that this is a good idea that will help improve library accessibility. The Circ Committee will present this as a recommendation at the next membership meeting.
- B. Hold Shelf Delay setting - There is a setting in Evergreen that can be turned on to put a delay period between when a hold is checked in and when it shows in the patron account as ready for pickup. Currently there are 20 libraries using this setting for a variety of time periods.
 1. Uniform setting for consortium vs. library by library setting
 - a) Mickey Coalwell discussed the overall goal of standardizing settings for common functions across the whole of Missouri Evergreen.
 - b) It was noted that the workflows for processing holds vary a lot between library systems in Evergreen due to size and courier delivery dates which would impact desired delay timing for many..
 - c) Meredith McCarthy will create information to share with the consortium as an awareness campaign about this setting and how to find where it is controlled.
 2. There is a bug for the patron side display when hold is on delay where there is just a blank space for hold status.
 - a) <https://bugs.launchpad.net/evergreen/+bug/1959405>
- C. Go Home to Fill Holds setting - consortium vs. library by library setting
 1. Traditional

- a) Prioritizes holds **where** the Check in/Capture Library is the same as the Pickup Library
 - b) Can help fill holds more efficiently and reduce transit of items
Holds are not filled in order they were placed
 2. FIFO “First In, First Out”
 - a) Prioritizes the hold request **time** and fills holds in order of request time
 - b) Can increase transits of items
 3. The Always go Home setting can be added to either of these scenarios. This would make holds placed by patrons at the owning library the first priority and then the system would follow either the Traditional or FIFO rules.
 4. A working group was created to discuss holds fulfillment settings and to gather input towards a consensus on what a consortium wide Fill Holds setting might be. Members are Diane Disbro, Lori Mangan, Krista Jackson, and Mickey Coalwell.
- D. The need for creating more detailed offline circ documentation cheat sheet / instructions was discussed. Meredith McCarthy will use the document below to generate a cheat sheet to share. https://docs.evergreen-ils.org/eg/docs/3.6/circulation/offline_circ_webclient.html

III. Old Business

- A. Damaged Items Best Practices Guidelines and Circ Policy revision were approved at membership meeting. They are available on the Missouri Evergreen website.
- B. Patron permissions
 1. Diane Disbro reported that 35 libraries responded to the survey and there is only one patron permission group that no one is using - “county students.”
 2. New information did arise that allows libraries to hide the patron permissions not in use in their system which makes pursuing the streamlining a moot point. Diane Disbro has shared to the listserv how to make that change.
 3. The recommendation of the committee is to eliminate the “county students” patron permission and replace it with “institutional” as requested by Cass County and Poplar Bluff.
- C. Committee member opening - There is still an open slot on the committee. Please contact Meredith McCarthy if you are interested.

IV. Other

Committee Members:

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