Missouri Evergreen Circulation Committee Meeting Minutes

Tuesday, March 28th at 11am

I. **Public Comments**

II. **New Business**

    A. The third in-person Regional Training day will be Thursday, March 30th at Barry-Lawrence Regional Library's Monett branch. Lee Ann Santee reported that there are 32 people signed up.

    B. Finalized recommendation for how to handle patron requests for a library card at your library when the patron already has a card from another ME library.

    A new account may be created, as long as patrons do not have outstanding charges on other Missouri Evergreen accounts. If other ME accounts are found and there are outstanding charges that exceed your library's fines/fee threshold, ask the patron to pay or reconcile charges on their other accounts first before creating another account.

    C. Reminders about Notes – Alerts – Blocks
Documentation can be found in Evergreen Documentation under Circulation>Circulation-Patron Record>Consolidated Patron Notes, Alerts, Blocks and Messages
Cass County [Training Manual\Creating Messages.docx](Training Manual\Creating Messages.docx)
Reasons for not being able to delete a message after it is READ by a patron:

        1. Clear communication – you wouldn't want a patron to see a note, then have staff delete that note, and then the patron logs in again and can't see the note—especially if it's something they wanted to follow up on.

        2. Patron self-management – just as we allow patrons via My Account to place/edit/cancel holds, renew books, pay bills & change some contact preferences, management of notes that are already read should be in the purview of the patron.

        3. Staff mischief – hopefully this is a rare occurrence, but not beyond the pale to think of a staff member changing up a note or deleting a note to cover up a mistake or other shady reasons.

    D. A circulation working group was formed to develop a recommended process/procedure for deleting long expired accounts This document will be intended to work together with the recommendation for purging accounts. Group members will be: Diane Disbro, Meredith McCarthy, Janice Butcher, Terri Moser and Rhonda Busse.

    E. Questions about Record In-House-Use---Item alerts will not display for items scanned into Record In-House Use. You are able to see the items current status by making sure you have a column for Status on your Record In-House Use screen. Staff need to watch that column when recording in-house use.

III. Old Business

A. Executive Director Mickey Coalwell gave an update about the upcoming 1st Annual Missouri Evergreen Users Conference April 13-14 in Columbia Register by going to: https://missourievergreenusersconf.sched.com/ Choose SIGN UP to create your account. You will be able to build a profile, personalize your schedule, see other attendees, and download the mobile app after you create an account. Use your work email address to create your account.

B. The Regional Training Day in Poplar Bluff was a success. Tony Miller from the Reports committee shared helpful information and had handouts about creating and using the Reports module in Missouri Evergreen. Those handouts will also be available at the training on the 30th of March.

IV. Other

A. Diane Disbro will be moderating a Circulation Interest session at the International Conference. She asked that we forward questions or suggestions for topics to her. The idea of one universal card for the entire consortium was raised with follow up questions of how the universal card process was implemented and if individual libraries could opt out.

Committee Members:

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