Missouri Evergreen Circulation Committee Minutes

Tuesday, July 23rd at 11am

I. New Business

A. The committee presented further updates to the Materials Best Handling document. Number 4 in the Courier Service section of the Materials Handling Best Practices document was originally revised to say: Keep a daily written spreadsheet to count individual **outgoing** items for monthly reporting. Counts should be based on what is visually accounted for; generating a report to determine counts of outgoing items is not recommended.

- After discussion, we agreed to remove the word "daily" from the first sentence of #4 for libraries that do not receive daily transit. See the final version (including this change) at the end of these minutes.
- Currently Tony Miller, Reports committee chairman, has created a report to tally all outgoing items sorted by sending or outgoing library. Kate Coleman from Jefferson County is testing it for the rest of the year to see how accurate it is and to determine what items would still need to be counted by hand.
- Libraries were encouraged to continue to keep a written spreadsheet until the accuracy of the report has been verified.
- Remember that each item being transited needs to have a transit slip and care must be taken that items are placed in the correct bag because several libraries have similar looking transit slips.

B. Equinox has requested that libraries be reminded of the importance of renewing staff accounts so that staff do not become "locked out" when these accounts expire. Equinox can fix the problem if it occurs, but they are requesting that libraries take steps to renew these accounts before there is an issue.

- Make sure there is an email associated with each staff account so that reminders can be sent before the expiration date. Make sure the email goes to an account that is not likely to change such as Tech Services or the Director.
- Consider staggering expirations dates so that all staff accounts do not expire on the same date and at least someone would be able to log in.
- Set reminders on your online calendar so accounts can be renewed before the expiration date.

C. Staff account security—potential issues and steps to take to lower your risk

- Each member library shares the responsibility to protect and accurately maintain data.
- If your library has individual staff accounts: make sure to delete those accounts when a staff member no longer works for your library.
- If your library uses one login for all the circulation computers: change your passwords regularly and consider changing passwords each time a staff member no longer works for your library.

D. Steven Potter led a discussion about the newly implemented Aged Circulation setting intended to protect patron privacy.

- Concerns were raised about the number of visible patrons with a request that libraries be able to see at least the current patron and one previous patron.
- Questions were fielded about how the system would work, how the setting would affect reports and what information would still be available in a variety of settings.

- While we will probably not be able to retrieve patron information that has already been "Aged," there will be tweaks to the settings so libraries are better able to retrieve needed information while still protecting patron privacy.
- Steven Potter recorded a list of questions for Equinox and reiterated that the importance of protecting patron information was what was driving the changes.

E. Emails about the Evergreen Circulation Interest Group were sent to everyone on the MEC circulation listserv. If you know of anyone else that would like to be a part of this group, they can register at http://list.evergreen-ils.org/cgi-bin/mailman/listinfo/evergreen-circ

II. Old Business

A. Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version 47 dated 424/24
- Periodically check that all "old" labels have been destroyed so that items do not accidently receive an "old" label.

III. Other

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COURIER SERVICE

1. Ensure that the correct courier label is on the bag. Note that some libraries have courier service to more than one branch. The courier label should match the transit slip.

2. Follow MALA guidelines for placement of courier labels.
- Courier Bags - Place a label in the clear label display window.
- Tub, totes and other packages - Affix a label to the package.
- Packages/boxes - Place a label on the top and on at least one side.
- Do not use USPS totes.

3. When using a previously used envelope or carton, remove, cover or black out all visible shipping addresses from previous shipments.

4. Keep a written spreadsheet to count individual **outgoing** items for monthly reporting. Counts should be based on what is visually accounted for; generating a report to determine counts of outgoing items is not recommended. Do not count bags shipped, but each individual outgoing

item, which could be several to a bag. This means each and every item (not bags) that leaves your library, whether it is a borrowed, loaned, mis-delivered, or reciprocal return, is counted. (Items to be counted include MEC items, traditional ILL, freebies such as DVD cases, etc.)

5. Check the MALA website regularly for the most current version of courier labels at https://www.malalibraries.org/courier-service/ - connected

6. Report any courier issues or request additional courier bags by contacting MALA at https://www.malalibraries.org/courier-service/courier-delivery-service-report-form/

7. For questions about courier reporting or service refer to the MALA ILL Courier Manual at https://www.malalibraries.org/wp-content/uploads/2023/09/MALA-ILL-Courier-Manual-REVISED-2023-24.pdf