

Missouri Evergreen Circulation Committee Minutes

Tuesday, August 26th at 11am

I. New Business

- A.** Equinox has applied the updated permissions for Circulators and Circulation Administrators to the test server. Libraries are encouraged to test both permission levels to ensure that Evergreen is responding as expected. Please report any problems or glitches to the Circulation Chairman at busser@casscolibrary.org

The following changes have been made and will need to be tested:

- **Add to Circ Administrators**
RUN_SIMPLE_REPORTS
VIEW_TRIGGER_EVENT
VIEW_TRIGGER_EVENT_DEF
ADJUST_BILLS
DELETE_USER
- **Remove from Circ Administrators**
DELETE_BILLING_TYPE
DELETE_CIRCULATION_DURATION
CREATE_PATRON_STAT_CAT
CREATE_PATRON_STAT_CAT_ENTRY
CREATE_PATRON_STAT_CAT_ENTRY_MAP
DELETE_PATRON_STAT_CAT
DELETE_PATRON_STAT_CAT_ENTRY
DELETE_PATRON_STAT_CAT_ENTRY_MAP
- **Add to Circulators**
ADMIN_HOLD_CANCEL_CAUSE
UPDATE_PICKUP_LIB_FROM_TRANSIT
MARK_ITEM_DAMAGED
UPDATE_PATRON_PRIMARY_CARD

- B.** The committee spent time this month working to produce best practice guidelines addressing Customer Service for Patrons from Other MEC Libraries. The new section will be added to the Material Handling Best Practices document. See these Best Practices at the end of this document.
- C.** Macee Jarvis reported that Scenic has noticed unusual changes to their patron records. Multiple patron accounts have had their *Primary Identification Type* field changed from Drivers License to Other (with no supporting reason such as utility bill or piece of mail included). She also reports that some other types of information, like the *Parent/Guardian* field are now located in the wrong field (this information is in a field one step lower than it should be on the registration form). During the meeting, attendees from many different library systems reported that they were also seeing the same changes on their patron accounts. Since Macee had already opened a ticket with Equinox, she agreed to inform them that other libraries are experiencing the same issue and to report back on Equinox's findings regarding the cause.
- D.** The committee decided to meet by Zoom to evaluate which Circulation training documents need to be updated. The committee will also discuss SMS messaging

issues with the goal of developing a recommendation for the consortium. See Other section B.

II. Old Business

- A.** Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **52—6/27/25**
- Periodically check that all “old” labels have been destroyed so that items do not accidentally receive an “old label.”

III. Other

- A.** A question was raised regarding how different libraries manage credit and debit card payments at the circulation desk. Most libraries process the payment first, then manually remove the fee from Evergreen. Currently, there does not appear to be a seamless way for payments to automatically credit the patron’s account.
- B.** Unchecking the SMS option in the *Holds Notices* field only disables SMS notifications for holds. To fully prevent all SMS messages from being sent, staff must remove both the SMS checkbox selection and the associated phone number. Colleen Knight reported that Equinox proposed a potential solution to modify the system so that deselecting the SMS option would automatically disable all SMS messages. Heather Arnold expressed concern that this change could stop all SMS notifications, whereas unchecking Email would only stop hold notices for patrons who prefer email, potentially causing confusion. Colleen suggested that Equinox could configure the system so that disabling either option would stop all patron messages.
- C.** Libraries were encouraged to check for long in-transit items coming from the St. Louis hub. The problem dates appear to be June 9–12, and possibly June 4–5, with the largest number of long in-transit items entering the courier system on June 11–12. Katrina from MALA has requested the barcodes and prices of these items.

Committee Members:

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Customer Service for Patrons from Other MEC Libraries

1. All frontline staff should be trained in your library's policies for serving patrons from other Missouri Evergreen Consortium (MEC) libraries.
2. Patrons may borrow materials only through established procedures at their home library or through reciprocal borrowing agreements.
 - Direct walk-in borrowing at another member library is not implied or permitted unless a reciprocal agreement is in place.
3. To check out items to patrons from outside your library district, your library must have a signed Reciprocal Borrowing Agreement.
 - Reciprocal Borrowing Agreement: <https://moevergreenlibraries.org/wp-content/uploads/2020/10/Reciprocal-Borrower-Agreement-2017.pdf>
 - List of reciprocal borrowing libraries: <https://moevergreenlibraries.org/libraries/>
4. Never modify a patron account belonging to another MEC library. This includes, but is not limited to: updating expiration dates, paying bills, and removing or clearing blocks that prevent checkout.
5. Regardless of reciprocal borrowing status, holds may be placed for patrons from other MEC libraries. Always select the patron's home library as the pickup location. Staff may assist in the following ways:
 - Placing the hold for the patron
 - Calling the patron's home library to request they place the hold
 - Helping the patron log in to place their own hold(s)
 - Registering the patron for a local card (see Section 6) and placing a hold for pickup at your library
6. Libraries may issue local cards to patrons from other districts, but only by following MEC best practices:
 - Always search the full MEC system before creating a new account.
 - If the patron already has an MEC account, check for outstanding charges.
 - If charges exceed your library's fine/fee threshold, ask the patron to contact their home library to resolve the charges before issuing a new card.
 - If no outstanding charges exceed the threshold, you may issue a new card following your library's local policies.