

Missouri Evergreen Circulation Committee Meeting

Minutes Tuesday, November 28th 2023 at 11am

I. New Business

- A.** New Circulation Committee Member—Jennifer Mathes from Jefferson County Library
- B.** Deleting/Purging project for Missouri Evergreen
 - Try to have this project finished by December 31st—Equinox will complete the system wide purge in January
 - If you have questions or are having problems running and processing the report contact Rhonda Busse at busser@casscolibrary.org
- C.** Label each package sent by the courier with an appropriate address label.
 - Courier bags: Place a label in the clear label display window
 - Tubs, totes and other packages: Affix a label to the package. When using a previously used envelope or carton, remove, cover or black out with marker all visible shipping addresses from previous shipments.
 - Packages/boxes need to be labeled on the top and at least one side.
- D.** Offline Circulation—how many libraries use it, and if not how do they operate when the internet is down
 - We polled the libraries represented at the meeting and found that none were currently using or planned to use the ME Offline Circulation mode.
 - Most ME libraries are using either Notepad, Word or Excel to record patron checkouts. They then go back and enter the information by hand after the internet interruption is resolved.
- E.** RFID tags—what to do when your materials come back with one
 - Send temporary RFID tag back to the owning library if it is not too inconvenient. In all cases, contact the owning library to let them know their RFID tags are not being removed before items are sent back to the owning library.
- F.** An Evergreen Circulation Procedure Manual subcommittee was formed to review and make any needed corrections to the draft submitted by Diane Disbro. The committee will meet by Zoom in December. Concerns about how to maintain/update the document will also be discussed.

II. Old Business

- A.** Ongoing problem of personally identifiable information on Hold Transit Slips
 - Equinox was able to remove the piece of code that caused patron barcodes to be visible on the **default** Holds Transit Slip.
 - Equinox suggests 2 options for more permanently fixing the problem. Either reset all circulation computers with the corrected Default Holds Transit Slip and save them locally or if you have customized your Holds Transit Slip template, reset all the computers with the corrected Default Holds Transit Slip then reenter the customizations and save them locally.
 - Transit slips are workstation specific, so if you notice this personal information on a hold transit slip, please notify the sending library so they can check each workstation.
- B.** Reminder to update Circulation contacts on the ME Website—send corrections to Ron Eifert at reifert@sikeston.lib.mo.us

III.Other

- A.** No circulation committee meeting on December 26, 2023.

Committee Members:

Belinda Birrer assistantdirector@poplarbluff.org

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Missouri Evergreen Circulation Committee Meeting
Minutes Tuesday, October 24th, 2023 at 11am

I. New Business

- A.** Updating Circulation contacts on the ME Website—send corrections to Ron Eifert at reifert@sikeston.lib.mo.us
- B.** Patron questions that involve another ME library.
- The circulation policy state, “Patrons will contact their home library if they have questions. They should not contact the lending library.”
 - However, owning library information does appear on a patron’s account if they are using the Missouri Evergreen app. Encourage patron’s from other ME libraries to have their home library contact your library for information about transit status, bills for damage or lost items.
- C.** Syndetics Unbound
- Syndetics Unbound has recently been enabled on the patron side of the OPAC.
 - Liz Rudloff shared a brief explanation and Diane Disbro shared her screen so everyone could see what information a patron would have access to.
 - Patrons will be able to see summaries, find information about the author, get professional reviews, see other reviews, write their own review, see a list of titles in a series, read an excerpt and see tags that might help them find other titles to enjoy.

II. Old Business

- A.** Ongoing problem of personally identifiable information on Hold Transit Slips
- We are continuing to see an uptick in the number of Hold Transit Slips that contain personally identifiable information in the form of patron barcodes.
 - Transit slips are workstation specific, so if you notice this personal information on a hold transit slip, please notify the sending library so they can check each workstation.
 - Instructions for removing Personally identifiable information were included with the Circulation Committee meeting invitation and agenda.

III. Other

- A.** The Circulation committee will be meeting on November 28th, but will not be meeting on December 26th.

Committee Members:

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Missouri Evergreen Circulation Committee Meeting

Minutes Tuesday, September 26, 2023 at 11:00 am

I. New Business

- A. Damage noted on another ME library's material**
 - Be sure to document damage on the ME Item condition slip-be specific enough so front line circ staff know what is being noted
 - Make sure to be polite and kind in wording your description of the damage
- B. Removing personally identifiable information from transit slips**
 - We have recently noticed an uptick in the number of Hold Transit Slips that contain personally identifiable information in the form of patron barcodes
 - Transit slips are workstation specific, so each workstation needs to be checked.
 - To check your Hold Transit Slip template go to:
Administration>Workstation>Print Templates>use the Template Name drop down to bring up Holds Transit Slip
 - If it is necessary, delete this piece of computer code:
`<div>Hold for patron {{patron.card.barcode}}</div>`
 - The code found on the MEC website by searching **Transit** should be the correct code.
 - Lee Ann Santee spoke about the need for this to be included in the onboarding process for new libraries joining Missouri Evergreen.
- 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.
 - Ron Eifert described potential liability to a library if a data breach were to be traced back to them, and encouraged anyone with questions to contact either Steve Potter or himself.
 - Lori Mangan ask where to find instructions for how to change passwords, and several members chimed in on the best way to do it.
- D. Circulating fragile items**
 - Do not send extremely damaged or fragile items to fill holds at another library. Contact the requesting library, if you are the only library that has the item, so they can inform their patron and possibly get the item through OCLC. Consider making extremely fragile items not holdable.
- E. How to spot a fake/bootleg DVD—several more DVD's are under review**
 - Encourage front line staff to read How to Spot a Fake/Bootleg DVD found under Circulation Training Materials on the ME website.

II. Old Business

- A. Thank you to Livingston County Library for hosting the Regional Circulation Training Refresh held September 12th.**

Tuesday, September 26, 2023

- There continues to be a large number of libraries requesting in-person training on reports.

III. Other

- A.** Karen Jones asked if it was ever allowable for a library to modify information for another library's patron. A discussion resulted in the following main conclusions:
- While not prohibited in the Circulation Policy, please do not edit/modify another library's patron information. If necessary, contact the patron's home library and allow them to make any needed changes.
 - Lee Ann Santee and Terri York added good tips on how to make sure you are bringing up and working in the correct patron record. Suggestions included: verifying contact information such as address, phone number or email address, verifying birthdates, and being sure to enter the patron's full middle name vs just an initial.
 - Rhonda Busse encouraged libraries to use the Preferred name field so that patrons could be pulled up by either their preferred or legal name.
- B.** Ron Eifert informed those attending MLA that ME library attendees would have a ribbon added to their name tag encouraging people to "Ask Me About Missouri Evergreen".

Committee Members:

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Missouri Evergreen Circulation Committee Meeting

Minutes Tuesday, August 22, 2023 11am

I. Public Comments

II. New Business

- A.** New Circulation committee member: Karen Jones from Jefferson County Library
Thank you to Meredith McCarthy for many years of service to the Circulation committee and Circulation community.
- B.** The next in-person Regional Training day will be Tuesday, September 12th at the Livingston County Library's Main Library, located at 450 Locust St in Chillicothe, MO.
- C.** Add heat to a known bug which would make the Default Hold Pickup Location a required field. <https://bugs.launchpad.net/evergreen/+bug/2031339> There is an explanation of what it is and how to create an account to "add heat" on the right side of the [MEC homepage](#).
- D.** Damaged Items between libraries. Handling items damaged by your patrons that belong to other ME libraries or when one of your items is damaged by another library's patron requires cooperation between ME libraries.
 - Because a library is not able to mark another library's items damaged, please call or email the other library to notify them of the damage so they can decide if they want to bill your patron and can mark their item damaged.
 - Please don't create/place a grocery bill on another library's patron. Allow the ILS to create a system bill. It is also helpful to provide a brief description of the damage when you place the bill.
 - Occasionally libraries will choose not to bill your patron especially if they are not planning on replacing the item or if the damage is minimal. For help in determining if the damage is billable vs normal wear and tear, see the Damaged Items Best Practices document located in Circulation Training Materials.
 - If a damaged bill is created, be sure to provide a preferred email or physical address so the other library can send an invoice.
- E.** How to spot a fake/bootleg DVD. Kate Coleman spoke about some ways to tell if a DVD is fake or bootlegged. There is an excellent article on how to spot a fake/bootleg DVD on the ME Circulation Training Page (found under the Member Resources tab). If you see something suspicious—refer the item to your library's cataloger or the ME Cataloging Committee to ensure the item is legit.
- F.** Zoom Ask the Director meeting on the 4th Monday of each month at 1:00pm. (Monday, Aug 28th)

Join Zoom Meeting

<https://zoom.us/j/92785298918?pwd=YmIFRWh4Z3dxOXdsTDA2eDV3MHhsQT09>

Meeting ID: 927 8529 8918

Passcode: 986139

Tuesday, August 22, 2023

III. Old Business

A. Questions or problems with the instructions for Deleting Expired Patron Accounts.

- A request has been made for a report that indicates a long expired patron who has been marked as a Group Lead. The report is called:
Patron Accounts with Expiration Dates and Balance Owed (updated with balance less than or equal to with Group Lead field) and is located under Administration>Reports>Templates>Equinox>General Templates From Equinox (ME)
- This report contains all the same fields as the original sent out with the instructions on how to delete patrons but adds the column to indicate patrons that have been marked as a Group Lead.

IV. Other

A. Further explanations about billing for lost/damaged items between libraries were shared with our newest library, Cape Girardeau.

B. It was suggested that Rhonda Busse resend the instructions for deleting long expired patrons, adding the information about the new report that can filter for Group Lead Accounts.

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Missouri Evergreen Circulation Committee Meeting Minutes

Tuesday, June 27th, 2023 at 11am

I. Public Comments

II. New Business

A. The next regional training refresh will be Tuesday, September 12th at Livingston County Library. To register please email your name, library and any special dietary restrictions to: Sue Lightfoot-Horine
director@livingstoncountylibrary.org

B. Report for Data Integrity/Purging project:

1. Patron Accounts with Expiration Dates and Balance Owed (updated with balance less than or equal to)

- This report is found under Templates > Equinox > General Templates From Equinox (ME)
 - Output will display these columns: Barcode, Active, Privilege Expiration Date, and Short (Policy) Name, which is the library name.
 - Output will NOT include patrons whose accounts are Barred or already deleted.
 - You will be able to limit the output to include only patrons who owe less than a dollar amount that your library has decided is an acceptable threshold for deletion.
 - Output will show both Active and Inactive patron accounts. Active will be designated with the numeral 1 in the Active column. Inactive will be designated with the numeral 0 in the Active column.
2. Questions were posed about how to proceed after the report was run, and we walked through the next steps to complete deleting.
3. Step by step directions will be sent to the following lists by the end of the week or at the latest the start of next week.
- mecirc@lists.more.net
 - moevergreen@lists.more.net
 - medirectors@lists.more.net
4. Reminders were given that the actual deleting doesn't need to be done immediately. The goal is to have it complete by December 31, 2023 so that Equinox can do the batch purge in January 2024 before we upgrade to 3.10 in February 2024.

C. Training for trainers discussion

1. Rhonda Busse explained the need to increase the number of trainers for future yearly regional in-person circulation training. We discussed how

June 27th, 2023

we have divided up the state into quadrants, but feel like it may be more sustainable if we broke it into smaller sections. Liz Rudloff, MEC consortium cataloger, will send Rhonda a map of the consortium divided into 6 sections, with the goal of keeping travel time to less than 2 hours.

2. We asked for people who are good at training or for people who would like to learn to train to volunteer by emailing Rhonda Busse. LeeAnn Santee said she would be willing, but would first need to check with her Director.
3. Plans were made to gather names and plan a Zoom meeting to actually train the trainers.

III. Old Business

A. Reorganizing the Circulation Training page under Member Resources on the Missouri Evergreen website

1. The project had been delayed pending an Executive Board discussion on how to proceed with a revamp of the current MEC website.
2. Plans were made to schedule a Zoom meeting to work on the project. Rhonda will email the working group to set up a time that works for all.

IV. Other

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Missouri Evergreen Circulation Committee Meeting Minutes

Tuesday, May 23rd, 2023 at 11am

I. Public Comments

II. New Business

A. Possible reports for Data Integrity/Purging project:

1. Equinox Report **Patron Accounts with Expiration Date**
2. Original suggested report **List (In)active Patron by Active and Expiration Date without notes (equinox)**
3. Rhonda Busse reported that the new Equinox report does not seem to be working for Cass County. Diane Disbro offered to rerun the reports to check that all the data was entered correctly. Rhonda Busse encouraged the committee to use the new report to see if there were any additional problems.

B. Possible reports for a list of current minors.

1. Tony Miller, report committee chairman has created the report **Patron Age Breakdown (2.0)** This report is located in the Shared Folders under Poplar Bluff in the Reports Committee Folder or you can just do a search for it and it will pop up. It allows you to search for patrons by birthdate range.
2. Colleen Knight suggested the report **List Patrons by Library, Permission Group, and Privilege Expiration Date**. She says it will give you too much data, but you can manipulate the results in Excel and only keep the ones that have a Juvenile Flag.

C. Various attendees shared how their library plans to expire their minor accounts and what procedures they are putting into place going forward. A request was made to share examples of the new forms created to insure compliance. Several have already been shared on the listserv.

D. Diane Disbro went through the list of Check in Modifiers, explaining what each one does and when it is appropriate to use them.

E. Meredith McCarthy and Terri Moser volunteered to help Rhonda Busse reorganize the Circulation Training page under Member Resources on the Missouri Evergreen website.

III. Old Business

A. Diane Disbro gave a short recap of the International Evergreen Conference. One of the most exciting things is the hiring of a new Front End Developer to work on making front line use of the ILS more consistent. She also mentioned that Georgia PINES has created a new interface for signing up students (school accounts).

IV. Other

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May 23rd, 2023

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Missouri Evergreen Circulation Committee Meeting

Agenda Tuesday, April 25th, 2023 at 11am

I. Public Comments

II. New Business

- A.** New circulation committee member Terri Moser
- B.** Working group update on data integrity and deleting/purging

Missouri Evergreen Consortium's commitment to data integrity insures the overall accuracy, completeness and consistency of shared data. It also addresses the safety of that data in regard to regulatory compliance and security. Each member library shares the responsibility to protect and accurately maintain this data. Consortium wide data integrity will provide accurate statistical reporting to the State Library, compliance with the Missouri Evergreen Policy on Personally Identifiable Information (PII) and keep the database current while limiting the number of patrons affected, should there be a data breach.

It is recommended that all consortium libraries delete library accounts that have been expired for three years and that the ILS vendor purge those deleted accounts once yearly. Exceptions could be made for accounts that have bills or are barred. [Retention Guidelines.pdf](#) (p5) Instructions, and help if needed, for running reports to determine which accounts should be deleted will be provided.

III. Old Business

- A.** Recap of the 1st Annual Missouri Evergreen Users Conference April 13-14 in Columbia—Mickey Coalwell reported there were 92 attendees with around 40 of those on site. Some recordings and hand out material is available at the Sched site.
- B.** Recap of the third in-person Regional Training day held Thursday, March 30th at Barry-Lawrence Regional Library's Monett branch. Diane Disbro did a great job leading 32 attendees from 7 different libraries through refresher training material.

IV. Other

- A.** Sue Lightfoot-Horine, president of Missouri Evergreen asked that a copy of the state retention guidelines for libraries be shared on the listserv.
- B.** 15 CSR 30-200.015 Library Certification Requirement for the Protection of Minors was discussed with several libraries sharing their plans. Rhonda Busse reported that Robin Westphal, Missouri State Librarian, asked that libraries call her with their questions. Her phone is: (573-526-4783) or (800) 325-0131
- C.** Rhonda Busse will contact Tony Miller, Reports committee chairman, to see if libraries can get a report listing their current minors.

Tuesday, April 25th, 2023

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Missouri Evergreen Circulation Committee Meeting Minutes

Tuesday, March 28th, 2023 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](#)

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.

March 28th, 2023

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.

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Missouri Evergreen Circulation Committee Meeting Minutes

Tuesday, February 28th, 2023 at 11am

I. Public Comments

II. New Business

- A. Regional Refresh at Poplar Bluff on March 15th and Barry-Lawrence on March 30th. Registration information can be found at: [Regional Circulation Training \(1\).png](#)
- B. Mickey Coalwell gave an update about the 1st Annual Missouri Evergreen Users Conference April 13-14 in Columbia. Register for the conference at: <https://missourievergreenusersconf.sched.com/>
- C. Handling new card requests of patrons with existing cards at other ME libraries—wording for a recommendation was considered and will be finalized by next meeting
- D. Updating staff accounts--log in accounts are set up similarly to patron accounts and can be searched for under "patron search". If you can't find your admin accounts via username search, try to search by profile group. (cataloging administrator, circulation administrator, local system administrator) OR If your library migrated to ME pre-Equinox, those accounts are set up with a last name of "user"

III. Old Business

- A. Purging patron accounts recommendation:
To keep the ME database current and to limit the number of patrons affected should there be a data breach, it is recommended that all consortium libraries have the ILS vendor purge accounts that have been expired for three years. An exception could be made for accounts that have bills and accounts that have been barred. [Retention Guidelines.pdf](#) (p5)

IV. Other

- A. Mickey Coalwell explained the need to document and preserve our Consortium's institutional knowledge for new library staff. He asked for volunteers to join an ad hoc committee to formulate an Orientation to the Missouri Evergreen Consortium Following Director and Staff Turnover document(s). Volunteer by emailing Lee Ann Santee chairman of the Onboarding Committee at: leeann@blrlibrary.org

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Missouri Evergreen Circulation Committee Meeting Minutes

Tuesday, January 24th, 2023 at 11am

I. Public Comments

II. New Business

A. Patron Groups in ME

- Groups are formed by clicking Save and Clone
- To remove a patron from a group:
Pull up the patron in Patron Search then click on Other>Group Member Details. You can remove a Group Member by clicking on the patron you want to remove and selecting Remove Selected from Group from the Actions menu.

B. Regional Refresh at Poplar Bluff on March 15th and Barry-Lawrence on March 30th

C. Reciprocal borrowing discussion—Executive Director Mickey Coalwell spoke about the background of Reciprocal borrowing, the issues being encountered with the current agreement and possible solutions that could be implemented. Diane Disbro explained about specific situations that are occurring and about the various variables that affect how checkouts and renewal currently work.

III. Old Business

A. Purging patron accounts recommendation

B. Simple Reports Intro video <https://vimeo.com/728913041/75124665fd>

C. The Reports Committee has produced a Google Slides presentation that goes into Simple Reporter in more detail. Go to: [Chair -- Missouri Evergreen - YouTube](#) to view the slides.

III. Other

A. Mickey Coalwell announced the date of the 1st Annual Missouri Evergreen Users Conference to be held April 14-15 in Columbia. The conference will be in person as well as many of the session available online.

B. Diane Disbro mentioned that she didn't see many circulation changes after reading through the documentation for the upgrade to Evergreen 3.9. One change noted was the ability to select a Patron Preferred Language when registering or editing patron information.

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January 24th, 2023

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Missouri Evergreen Circulation Committee Meeting Minutes

Tuesday, December 27th, 2022 at 11am

I. Public Comments

II. New Business

- A. New Circulation Committee member Brian Cleveland from Ralls County
- B. Storing patron's personal identifying information (PII)—Equinox will be removing PII from all consortium patron accounts. Please store any personal identifying information about your patrons in a separate location (not in ME patron records) if your library wishes to retain this information.
- C. Purging patron accounts recommendation—To keep the ME database “cleaned up” and to limit the number of patron affected should there be a data breach, the committee discussed and decided we would recommend that all consortium libraries have Equinox purge inactive accounts, that are not barred and do not have fines, at least every 3 years. Rhonda Busse will reach out to the State Library to see what recommendations or guidelines they suggest before bringing the recommendation to the Executive Board.
- D. Regional Refresh at Poplar Bluff on March 15th and at Barry-Lawrence on March 30th
- E. ME test server for 3.9
- F. Evergreen Documentation for 3.9
- G. Simple Reports Intro video <https://vimeo.com/728913041/75124665fd> Encouragement was given to attend the upcoming Reports Committee meeting to learn more about reporting in 3.9

III. Old Business

- A. Recap of Pilot Regional Circulation Refresh

IV. Other

- A. Diane Disbro reported on 2 initiatives she is working with Equinox to address.
 - 1. The ability to customize patron expiration dates vs the one size fits all 1 year patron renewal.
 - 2. The ability to delete item alerts that are no longer needed. Perhaps with options to make the alerts temporary, permanent or to delete.

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Missouri Evergreen Circulation Committee Meeting Minutes

Tuesday, October 25, 2022 at 11am

I. Public Comments

II. New Business

- A. Diane Disbro gave an update on the upcoming Regional Circulation Training day scheduled for November 17th at Scenic Regional's Union branch. There are currently 31 people signed up.
- B. The Circulation Committee discussed and approved the following proposed changes to the ME Materials Handling Best Practices document.

SENDING MATERIALS

1. Do not use tape on materials. Previously approved self-adhesive removable receipt paper is permissible. Print the transit slip and place it in the transiting item. **Place transit slips for audio-visual materials between the clear plastic cover and case insert, if possible, otherwise insert the transit slip in the case with the destination clearly visible.**

AND

MISSING-LOST-OVERDUE-TRANSIT MATERIALS

6. It is the owning library's responsibility to invoice the borrowing library **for items lost or damaged from the time the materials are initially checked in at the borrowing library until they reenter the courier system. The owning library should send an invoice to MALA when materials are lost or damaged while in the courier's possession.**
 - C. The Circulation Committee discussed and approved the following proposed changes to the ME Circulation Policy which will be presented to the Executive Board October 27, 2002 and at the Membership meeting on December 1, 2022.

IV. Responsibility of borrowing Libraries

A. General

Mid America Library Alliance is responsible for the safety of borrowed materials while they are in the custody of the MALA courier. The borrowing library is responsible for the safety of borrowed materials from the time the materials are initially checked in at the borrowing library until they reenter the courier system. The borrowing library is responsible for the prompt return of borrowed materials.

October 25, 2022

AND

B. Lost and Damaged Items

Lost and damaged items are billed in accordance with the policies of the owning library and the Missouri Evergreen Damaged Items Best Practices guidelines.

Payment for items lost and damaged when in MALA's possession will be handled between the owning library and MALA. Payment for items lost or damaged in the possession of the borrowing library or patron will be handled between the owning and borrowing library.

III. Old Business

- A. After losing a committee member because of retirement, we are asking the ME Circ community if anyone is interested in becoming a Circulation committee member. Contact Rhonda Busse at busser@casscolibrary.org if you are interested or want additional information.

IV. Other

- A. A reminder was given to make sure no patron barcodes are printed on transit slips when the item is being sent to fulfill a hold. Both Lee Ann Santee and Meredith McCarthy offered to send out customizable templates for Hold slips.
- B. The suggestion was made to see if Equinox has or could produce a global template resource for the entire consortium.

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Lee Ann Santee leeann@blrlibrary.org

Sandy Welker swelker@rrlmo.org

Missouri Evergreen Circulation Committee Meeting Minutes

Tuesday, September 27, 2022 at 11:00 am

I. Public Comments

II. New Business

- A. A discussion was held about billing MALA for in-transit items that are lost/damaged after they are picked up by the Henry courier rather than billing the sending library. The committee will work on drafting a best practice statement to be added to the Missouri Evergreen Materials Handling Best Practices document currently posted on the ME website.
- B. Refreshing the screen will often correct the Exceeds_checkout_count pop up that comes up after changing a patron profile to a new profile that allows more checkouts. This is a known bug and is scheduled to be fixed in the Equinox update next month.
- C. A reminder was given to check individual discs in multi-part items before check in to prevent sending the wrong disc to the next patron and to aid with trying to reunite mismatched discs with their correct cases.
- D. Diane Disbro shared an overview of the Regional Circulation Training in November and that Scenic Regional will be providing lunch for all who attend. Because of Zoom issues the committee was not able to show the list of topics we are planning to cover at the upcoming Pilot Regional Circulation Training, so Rhonda Busse will email that list to the ME Circ community for further input.
- E. After losing a committee member because of retirement, we are asking the ME Circ community if anyone is interested in becoming a Circulation committee member. Contact Rhonda Busse at busser@casscolibrary.org if you are interested or want additional information.

III. Old Business

- A. Training video for Checkin Modifiers— <https://vimeo.com/516922609>
- B. Additional circulation training videos may be found in the Evergreen Circulation Video Showcase:
<https://vimeo.com/showcase/equinoxedu-evergreen-circulation>

IV. Other

- A. Diane Disbro led the meeting until Rhonda Busse could get logged in after experiencing Zoom login problems.
- B. Mickey gave a reminder about how important it is to make sure every item moving between libraries contains a transit slip.

Tuesday, September 27, 2022

- C. Lee Ann Santee offered to check into scheduling another Regional Circulation Training, at Barry-Lawrence Regional Library, for the Southwest area of the state.

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Missouri Evergreen Circulation Committee

Agenda Tuesday, August 23rd , 2022 at 11am

I. Public Comments

- A. Mickey Coalwell announced the hiring of Elizabeth Rudloff as the new Missouri Evergreen Consortium Cataloger.

II. New Business

- A. Transit slips in media cases—a request has been made to place transit slips inside DVD and CD cases with the destination sticking out instead of between the clear plastic cover and paper cover. After discussion the committee decided to recommend that libraries continue to place transit slips between the clear plastic cover and the paper cover. Transit slips may be placed inside the case, with the destination showing, if damage to the media case prevents placing it between the plastic and paper.
- B. Transit slips with visible patron information— Patron barcodes should not show on transit slips because of privacy concerns. In the last major upgrade, we lost the global custom templates that had standardized what everyone had. We hope to get link on the ME website giving directions on how to remove patron information from transit slips.
- C. Setting limits on patron holds/suspending holds—Hold settings may be changed in Local Administration or by contacting Equinox. Encourage patrons to suspend holds, to activate at a later time, if they want to place more holds than can be active.
- D. Inventory dates—Evergreen provides 2 options for adding an inventory date to an item: through the Check In interface or in the Item Status screen.
 - The Check In screen contains a Checkin Modifier call “Update Inventory”. When the Update Inventory modifier is selected, Evergreen will record an inventory date for all items as they are checked in.
 - The Item Status screen has an Action to Update Inventory. After scanning in or uploading a file of item barcodes, staff can select Actions>Update Inventory to update the inventory date for all items selected.
- E. Reciprocal Borrowing—Reminder that reciprocal borrower privileges are valid while the borrower’s home library account is active and in good standing. Please encourage patrons to contact and work with their home library if their account is not in good standing.
- F. Training video or document for Checkin Modifiers—The committee will do more investigation into Checking Modifier documentation from Equinox and Georgia Pines before we begin this project.

Tuesday, August 23rd , 2022

III. Old Business

- A. Claims-returned count—this is a system wide setting. To make a change we would need to get a consensus of how claims returned counts should be used. (Do we want the actual count or do we want to keep a record of the number of items a patron has ever claims returned.) The circulation committee will continue discussions and present a recommendation to the Executive Board.
- B. Link to How to spot Fake DVD's—has been added to the ME website and can be found under Member Resources in both Cataloging and Circulation Training Materials

IV. Other

- A. The Action Mark Claims Never Checked Out was discussed. This action removes the item from the patron's account, increases the Mark Claims Never Returned Count and moves the item into Reshelving status.
- B. Diane Disbro offered to do a Circulation Training video to be used in conjunction with Equinox training or as a refresher.

Committee Members:

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Diane Disbro ddisbro@scenicregional.org

Missouri Evergreen Circulation Committee

Agenda Tuesday, July 26th, 2022 at 11am

I. Public Comments

- A. Contact the sending library if items are received with tape on them. Point them to the Materials Handling Best Practices document found on the ME website under Member Resources > Circulation Training Materials > Materials Handling.

II. New Business

- A. PATRON EXCEEDS CHECKOUT LIMIT bug
 - 1. <https://bugs.launchpad.net/bugs/1981764>
- B. Transit slips-reminder to place a transit slip in every item that is transited even if it's just "going home".
- C. The Claims-returned count field in the patron record does not automatically reduce if an item previously marked claims returned is found or returned. Staff can manually adjust this count by editing the patron record.
- D. Bootlegged DVD's--While we know that no ME library would intentionally purchase a bootlegged DVD, it can be tricky to identify them. Occasionally one might make its way into our shared catalog. If you notice a questionable item, contact the owning library with your concern or contact the cataloging committee at cathelp@moevergreenlibraries.org
 - 1. A suggestion was made to check if the link on How to Spot Fake DVD's, shared by Kate Coleman, could be added to the ME website.

III. Old Business

- A. Cataloging committee still in need of new members. Contact Gregg Whitmore at cataloger@moevergreenlibraries.org to find out more.

IV. Other

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Tuesday, July 26th, 2022

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Missouri Evergreen Circulation Committee

Agenda Tuesday, May 24th, 2022 at 11am

I. Public Comments

A.

II. New Business

A. Wishlist bug for Internet Only patrons error messages

1. <https://bugs.launchpad.net/bugs/1974469>

III. Old Business

A. Offline circ full documentation and cheat sheet have been shared via email and will be added to the website

B. Lingering issues from the upgrade

1. Transit slip font issues - json and HTML file has been shared
2. Hold pull list font list and barcodes - update didn't fix it. Print full list a little bigger.

C. Labeling the number of discs on AV items has been added to materials handling best practices document.

D. Hold shelf delay documentation is still pending

E. Hold fulfillment working group - There are options to have your items come home prior to going to another ME library. Holds should be sent out to other ME libraries when trapped and the receiving library will address any potential issues on the patron side restricting checkout .

1. Mickey stressed the need for default settings for incoming libraries that they can adjust later.

2. Concerns were raised about potential burden to the courier if holds always go home.

F. Patrons permission change has been completed. County students has been replaced with Institutional.

G. Still have an opening on the committee as an at large member.

IV. Other

A. Cataloging committee in need of new members. ME cataloger position ending.

B. Hold groups - new feature in 3.8. Create a group for a particular author so that all the patrons in the group will have holds placed on the new books

Tuesday, May 24th, 2022

when they come out. The list will be randomized. Staff can't see if the patron is on the list. Patrons can see it on their side. It's a known bug.

1. A simple startup guide has been requested. There is documentation in the 3.8 upgrade information.

Next meeting is June 28th at 11am.

Committee Members:

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Missouri Evergreen Circulation Committee

Agenda Tuesday, April 26th, 2022 at 11am

I. Public Comments

A. Update Concerns

1. Hold list printing small / issues with barcode not showing.
 - a) It is a bug that the barcode isn't showing that will be pushed through in a patch.
 - b) EQX having issues replicating the small text issue. It can be scaled to a point with the print settings.
2. Transit slips printing small. There are some templates floating around for testing in JSON format and HTML format. Still trying to determine if a global fix is an option.
3. Boxed alert missing in the left hand side text to act as an additional alert for staff notes.

B. Make sure to be using the current routing slips for all locations. Webster County is still experiencing issues with items not going to the correct locations with the routing labels. (Add link to minutes for where to download the new labels, making sure to be on the MALA listserv)

II. New Business

- A. Chair transition - Rhonda Busse will be taking over as chair in July.
- B. Henry has been announced as the winner. Limited responses received during the bid process. Keep documenting any concerns and keep communication open with MALA.
- C. Suggestion to add including the number of discs on the AV box to the circulation best practices document. Also, media included with the book. Diane moved and Rhonda seconded. Motion carried.
 1. Can also be noted in the system as well. (Share those directions.)
- D. Strict Barcode update
 1. <https://bugs.launchpad.net/evergreen/+bug/1969235>

III. Old Business

- A. Patron permissions change approved: county students replaced with institutional.
 1. Institution permission group is being added today.
 2. Libraries with county students active accounts are being changed. Those libraries have been contacted.

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- B. Spanish translation for the catalog suggestion. Recommend at the next membership meeting.
- C. Documentation (McCarthy): Hold Shelf Delay and Offline Circ
 - 1. Offline circ draft shared via email for feedback.
 - a) Scenic and Carthage do use it regularly when offline occurs.
 - 2. Hold shelf delay documentation is still pending.
- D. Hold Fulfillment Working Group: Diane Disbro, Lori Mangan, Krista Jackson, and Mickey Coalwell
 - 1. Work in progress
- E. Committee member opening - There is still an open slot on the committee. Please contact Meredith McCarthy if you are interested in serving.

IV. Other

- A. Regional training for circ staff is a possible goal for the future. Make sure to be communicating your needs with this committee and the MO Evergreen board.

Next meeting is May 24th at 11am.

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Missouri Evergreen Circulation Committee

Meeting Minutes for Tuesday, February 22nd, 2022 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

Tuesday, February 22nd, 2022

- 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.

Tuesday, February 22nd, 2022

IV. Other

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Missouri Evergreen Circulation Committee

Meeting Minutes for Tuesday, January 25, 2022 at 11am

I. Public Comments

- A. Introduction of Mickey Coalwell, Executive Director for Missouri Evergreen

II. New Business

- A. Patron permissions (Diane Disbro)

1. The FineFree permission group was added after the last membership meeting. It is available for use by member libraries who do not wish to charge fines to a select patron group.
2. There was discussion regarding the streamlining existing patron permissions since the list is getting quite lengthy. Statistical categories are an option for when you need to be able to cull out a particular portion of the user base for reporting but they have no special checkout privileges or restrictions. Diane is sending out a survey to the circulation contacts at member libraries so we can get an assessment of which patron permissions are being used and why. She will also include a video detailing stat cats and how they can be used.
 - a) How different libraries use the nonresident permission group was discussed. Having that as a very easy to see flag for staff for collecting fees is important.
 - b) Statistical categories currently live at the very bottom of the patron account screen and could possibly be moved up as we encourage the use of them through this project.

- B. Issues with certain special collections items that don't transit trying to circulate to other ME libraries was discussed. Meredith noted that at JCL some of that behavior has been traced to circulation rules being broken by items getting a different home location than they had before when they were brought back into circulation.

III. Old Business

- A. Damaged ME items best practices working group (Meredith McCarthy)

1. The Missouri Evergreen Damaged Items Best Practices Guidelines DRAFT was shared and discussed.

Tuesday, January 25, 2022

2. The revision to ME Circulation Policy to include the reference to the Damaged Items Best Practices document was shared and discussed.
3. Belinda moved to recommend the Missouri Evergreen Best Practices Guidelines and revision to the Missouri Evergreen Circulation Policy to the Board for their consideration. Diane seconded. Motion carried.

B. Staff permissions (Diane Disbro and Nate Beyerink) – No Report

C. Opening for additional member of the committee

1. We do still have an opening for an additional member on the ME Circulation Committee. If interested please contact Meredith at mmccarthy@jeffcolib.org.

IV. Other

- A. Rhonda noted that she would be unavailable to attend the February meeting.

Committee Members:

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