

Missouri Evergreen Circulation Committee

Minutes Tuesday, November 25th, 2025 at 11am

I. New Business

- A. Libraries are encouraged to complete the *Deleting Expired Patron Accounts* project by the end of the year. Equinox will purge all deleted accounts on **Jan 5, 2026**.
- B. Questions have arisen about why an item goes into **Hopeless** status after a hold is placed on an On Order item record. On Order records are typically entered as brief records; once the item arrives, a cataloger creates the full record.
 - If the cataloged item has **Parts**, the original hold becomes hopeless because it did not specify any part.
 - The Cataloging Committee is scheduled to discuss the issue at their next meeting.
 - In the meantime, libraries should place a new hold designating the specific part the patron wants, and **edit the Hold Request Date** to match the original request date.
- C. Equinox continues to troubleshoot the recent system-wide Auto log outs. Thank you to everyone who submitted examples of actions taken before you were logged out. Some libraries are still experiencing occasional issues. As a possible help, staff are encouraged to log out of Evergreen when the library is closed.
- D. Item Condition Reports should only be taped to an item using Scotch Removable Tape, unless the item belongs to your library.
- E. The Circulation Resource page of the MEC website has been updated, and the revised links have been added to the MEC Circulation Procedure Manual.
 - Updated documents include: *MEC Circulation Policy*, *MEC Circulation Best Practices*, *Accounting for Lost or Damaged Items*, *Deleting Expired Patron Accounts*, *Finding Shelf-expired Holds That Are on Another Library's Hold Shelf*, and *Hopeless Holds*.
- F. The circulation committee has identified several libraries to officially test and report on whether the changes to Circulator and Circulation Administrator permissions are functioning as expected. This testing is required before the Permission Project can move to the next phase.
- G. Libraries were given advanced notice of upcoming changes to **General Staff** and **Non-Circ** permissions.
- H. The CAN Committee requested feedback about the current placement of Circulation Policies in Local Administration. They would like to understand: Whether libraries make their own changes or request Equinox assistance, and whether moving Circulation Policies to Server Administration would help avoid confusion or unintended consequences.
 - Many libraries indicated they prefer to make their own changes and reach out to Equinox only when needed.
 - Lee Ann Santee provided an update on the upcoming Missouri Evergreen Local Administration Training Manual, which many libraries are looking forward to using for guidance.

II. Old Business

- A. Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **52—6/27/25**

Tuesday, November 25th, 2025

- Periodically check that all “old” labels have been destroyed so that items do not accidentally receive an “old label.”

III. Other

- A. The December Circulation Committee meeting is cancelled. Our next meeting will be January 27, 2026
- B. In response to recent questions, Belinda Birrer reminded libraries that Poplar Bluff Public Library received MEC approval to pilot the insertion of permanent RFID tags into items from other MEC libraries. This pilot program is expected to continue through spring of 2026.
- C. Heather Arnold reminded participants to complete the Reports Committee Training survey.

Committee Members:

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Missouri Evergreen Circulation Committee

Minutes Tuesday, October 28th, 2025 at 11am

I. New Business

- A. Libraries discussed allowing patrons to keep damaged items once they have been paid for. Currently the committee is waiting for additional information from Heartland Regional Library about how their damaged but “rented” items are handled before posting the updated version of the *Accounting for Lost or Damaged Items* document. The majority of libraries allow the borrowing patron to keep damaged items once payment has been made
- B. Dealing with damaged items that come from a library other than the owning library.
 - Communication between libraries is essential. If an item is clearly damaged enough to bill the patron, it should not be sent in transit to another patron or library. Doing so can cause confusion about where the actual damage took place.
 - However, if this situation does arise, contact the previous patron's home library. The home library should then reach out to both the patron and the owning library to ensure the item is properly billed and invoiced.
 - The damaged item should be returned to the patron's home library so the patron can inspect the damage and, if appropriate keep the item once it has been paid for.
 - To address how to send the item back to the previous patron's home library while maintaining accurate item status, the committee discussed creating one account for each library that includes the library's name plus one identifying term (e.g. “Cass mending” or other agreed upon term).
 - The committee will continue discussing this option and report back at the next Circulation Committee meeting.
- C. Pull list and marking items missing vs canceling the hold—Please don't cancel another MEC library patron's hold.
 - If you can't find an item on the Pull List, retarget the hold or mark the item Missing so the hold can move on to an available copy.
 - If you know your library is the only MEC library that owns the item and you need to mark it Missing, a quick email or phone call to notify the requesting library is always appreciated.
- D. Clarifications about how libraries can receive credit for attending Circulation meetings have been added to the ME Circulation Policy. See the clarifications at the end of these minutes.
- E. In response to an inquiry from the Cataloging Committee, attendees were asked to share their opinions about merging item records for paperback and mass market editions from the stand point of patron accessibility. Generally, opinions fell into 3 categories:
 1. **Merge them**, as fewer bibliographic would make the catalog less confusing for patrons.
 2. **Do not merge them**, since many patrons have visual or physical challenges that make certain formats difficult to use or enjoy. Merging could make it harder for these patrons—and for library staff—to find and request materials in the most suitable format.

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3. **Consider loosening cataloging rules slightly** to allow more similar items to share the same record, which could reduce the overall number of bibliographic records without compromising accessibility.

The Circulation Chairman will summarize and forward the opinions expressed to the Consortium Cataloger and the Cataloging Committee.

- F. Libraries were encouraged to begin working on the annual purge project.
 - Updated instructions have been added to the Circulation Training Materials page (soon to be renamed *Circulation Resources*), though they have not yet been linked to the MEC Circulation Procedure Manual.
 - Libraries are encouraged to delete patron accounts “little by little” and to use off-peak times to avoid system slowdowns when reasonable according to the library's schedule.
 - Equinox suggests sending **Staff accounts** to them for deletion. They will complete these deletions at a time that is less likely to impact system performance.
 - **Equinox will purge all deleted accounts on Jan 5, 2026**

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. The addition of Ozark Regional Library added: 25,247 additional bibs, 63,657 items and 10,480 patrons to Missouri Evergreen

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III. Circulation Committee

The Circulation committee will be composed of staff who are actively involved with circulation related duties on a regular basis from different libraries recruited by the Executive Board or the Circulation Committee Chairperson. Consideration will be taken to appoint committee members from

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libraries with varying budgets, number of materials, and size of service area. The Circulation Committee chairperson will be appointed by the Executive Board.

The Circulation Committee will meet a minimum of ten times a year. The meetings will be led by the committee and all Missouri Evergreen libraries are encouraged to participate. Regular participation strengthens interlibrary cooperation, allows for open communication, and ensures understanding of circulation policies.

Each member library is required to be represented at a minimum of four meetings each year. The recommended method of fulfilling this requirement is for a library representative to attend the live Zoom meetings. If a representative is unable to attend the live Zoom meetings, the library may satisfy the attendance requirement by either reading the posted meeting minutes and submitting a brief summary to the Circulation Committee Chairperson, or viewing the recorded meeting and submitting a brief summary to the Circulation Committee Chairperson.

Missouri Evergreen Circulation Committee

Minutes Tuesday, August 26th, 2025 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.

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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.

Missouri Evergreen Circulation Committee

Minutes Tuesday, July 22nd, 2025 at 11am

I. New Business

- A.** Welcome to new Circulation Committee members Darcy Humphrey from Carthage Public Library and Madison Morris from Webster Groves Public Library.
- B.** Is there a need/desire for a circulation permission level similar to what cataloging has done with "Baby Cat"?
- The general consensus seems to be that it is probably not necessary.
 - Concerns were raised about the ADJUST_BILLS permission. The circulation chairman will test the permission that allows staff to Allow a user to adjust a bill (generally to zero) with a decision to be made by the August meeting.
- C.** Reciprocal borrowing agreement / placing holds for another MEC library's patrons
- Reminders were given that staff education/training is essential so that all frontline staff understand your library's policy on checking out to patrons from other MEC libraries.
 - After discussing placing holds for another MEC library's patrons, regardless of your library's reciprocal status, the following best practices were agreed on, with final wording to be presented at the August meeting.
 1. Never modify a patron account that belongs to another MEC library.
 2. Direct patrons to work with their home library to address account issues.
 3. Holds placed for another MEC library's patron should be picked up at the patron's home library.
 - Staff may place holds for the patron, call the home library and ask them to place the hold for their patron, help the patron log in to their account and allow the patron to place the hold or register the patron at your library then place a hold to be picked up at your library.
- D.** Discard/weed item status
- Best practice is typically using the discard/weed status as an interim step to get the items from the branch to the cataloger/person who will actually do the deleting. This step allows catalogers/acquisitions staff time to evaluate if they want to replace the item rather than delete that record. While an item is in discard/weed status it will still show in the staff catalog, but not on the OPAC. It is also possible to override and check these items out to a patron.
 - Run reports to find missing or damaged items and delete or replace if they are never found. When weeding, include the item status of missing and damaged along with available. If items are not found consider deleting them.
 - Deleting large numbers of items currently in discard/weed status, as a corrective measure, will affect your State numbers and an explanation should be included with your report.
 - The Circulation Chairman will work with the Cataloging Committee to develop best practices for discard/weed status items and deleting.

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- E. St Joseph Public Library has requested that the committee look into having courtesy notices sent out at a later time to allow items returned in the book drop to be processed.
 - Equinox reported that, "Courtesy notices appear set up per library system, so it wouldn't be too big of a deal to move the courtesy notices for a particular library system out a little farther in the day."
 - At this time, we will not pursue having a consortium setting, but library systems are free to contact Equinox to adjust their own notices
- F. Clearing the Holds shelf
 - Libraries were encouraged to process the Clear Holds list daily.
 - Adjust the shelf expire date if you need to keep an item for longer than your normal shelf expire time.
- G. Sequoia Maintenance on 7-23-25 is scheduled to fix the bugs causing patrons to receive notices by a default method even though the patron intentionally has no hold notification methods enabled.

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. Libraries reported continuing problems with couriers. Problems range from missed deliveries to extremely large deliveries as well as deliveries being made at widely variable times.
 - Continue to report every issue to MALA so they can work with Capital Express to resolve the problem.
- B. Texas County, Poplar Bluff and Scenic all have libraries that are temporarily closed. They reported that they are working with Equinox to ensure items are being properly renewed and returned to owning libraries as quickly as possible.

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Missouri Evergreen Circulation Committee

Minutes Tuesday, June 24th, 2025 at 11am

I. New Business

- A.** Libraries have reported that when staff attempt to use Patron View (on the staff side of the catalog) they are being routed to a new page with the following information:

Apologies, if you are seeing this page, the catalog is trying to discourage bots.
Please [click here](#) to continue using the catalog.

Clicking the link will take you to the Patron View of the item you selected. The Circulation Chairman will check on the possibility of putting a disclaimer on the OPAC

- B.** There have been courier issues involving changes at the Kansas City hub. Cass County, Trails Regional and possibly more libraries in the Kansas City hub have experienced receiving very few items for multiple days as well as couriers either not taking anything or only taking 1 or 2 tubs or boxes. MALA has been contacted and is working with Capital Express to resolve the issue. Until the issue is resolved, some items transiting out of this hub will take longer than normal to arrive.
- C.** Several libraries have reported longer than expected wait times for SMS hold notifications, especially over the Juneteenth holiday.
- D.** Beginning in July there will be a new Zoom login. Please use the link that will be sent on the July Circulation Committee meeting invitation.

II. Old Business

- A.** Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **51a—5/28/25**
1. Periodically check that all “old” labels have been destroyed so that items do not /accidentally receive an “old label.”

III. Other

- A.** Circ committee working session.
1. Permissions-The committee considered additions and possible subtractions to the current list of permissions for both Circulators and Circulation Administrators.
 - Approved additions for Circulation Administrators:
 - ✓ RUN_SIMPLE_REPORTS
 - ✓ VIEW_TRIGGER_EVENT (Allows a user to view the circ and hold related action/trigger event log attached to a user account (Consortium level - not grantable)
 - ✓ VIEW_TRIGGER_EVENT_DEF (Allow a user to view trigger event definitions (Branch level - not grantable)
 - ✓ ADJUST_BILLS Allows a user to adjust a bill to zero (Branch level - not grantable) Currently both Circulators and Circ Admin have the permission VOID BILLING.
 - ✓ DELETE_USER Allows a user to delete (purge) another user's account.

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- Approved (and *tentatively approved) additions for Circulators:
 - ✓ *ADMIN_HOLD_CANCEL_CAUSE This is where you can designate why the hold was cancelled. (Staff forced, Hold shelf expiration, Patron via phone, etc.)
 - ✓ UPDATE_PICKUP_LIB_FROM_TRANSIT (Allows a user to change the pickup and transit destinations for a captured hold item already in transit)
 - ✓ MARK_ITEM_DAMAGED (Allows a user to mark an item status as damaged) Currently circulators can't mark an item damaged. Circ Admin accounts can mark items damaged because they have both VIEW BILLING TYPE and UPDATE_COPY. Giving circulators MARK_ITEM_DAMAGED would allow them to mark something damaged without giving them permission to UPDATE_COPY which allows you to update everything.
 - ✓ UPDATE_PATRON_PRIMARY_CARD
 - The Circulation committee chairman will bring those recommendations to the June Ex Board meeting and complete a review with Jennifer Weston, from Equinox, before any changes will be made.
 - Questions were also raised about what would happen to accounts that have had additional permissions already added. Clarification from Equinox will be sought so that libraries will have adequate time to prepare for potential changes.
2. Document review-A working committee was set up to review all current circulation training documents residing on the MEC website. They have been tasked with reading and noting changes that need to be made with the goal of completing any corrections/changes by September.
 3. Thank you to the participants from many MEC libraries that stayed to hear the discussion, ask questions and make suggestions. The committee appreciates your opinions and interest in any possible changes.

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Missouri Evergreen Circulation Committee Minutes

Tuesday, May 27, 2025 at 11am

I. New Business

- A. Dealing with “problem items” between MEC libraries ALWAYS requires communication.
- Call or email the owning library to request that they mark their item Damaged. Please do not put “grocery” bills on patron accounts belonging to other MEC libraries.
 - Call or email the owning library to inform them that an item has been marked Claims Returned, Lost (By Patron) or to have a bill added for a Missing Piece.
 - Annotate bills with a brief description of the damage or missing piece.
 - Invoicing guidelines can be found in the MEC Materials Handling Best Practices document section on MISSING-LOST-OVERDUE-TRANSIT MATERIALS.
- B. Changing the item status for Missing Pieces--Currently marking an item as **Missing Pieces** checks it back out to the previous patron and changes the status of the item to **Damaged**. That status is more than a little confusing because these items aren't actually damaged and the patron is not being billed for damage. Equinox has created a new status that allows these items to show a status of Missing Pieces rather than Damaged.
- Even if your library uses a different procedure for items returned with something missing, it would be helpful if all MEC libraries changed their setting so that an accurate item status is displayed.
 - Instructions were given showing how to change the status to Missing Pieces and are included at the end of these minutes.
- C. Finalized Checking the Transit List document—After a new procedure for Checking the Transit List were published in April, the committee realized we had missed one essential step. An additional section has been added to address the need for replacement holds to be placed for patrons whose items were coming to your library to fill a hold.
- Missing in transit holds will not appear on the Hopeless Holds list.
 - The new instructions will be posted in the MEC Circulation Procedure Manual and in the Circulation Training Material section of the MEC website
- D. Clarification of MALA report terminology—MALA has requested that we check, approve and coordinate with them concerning the terminology we use to explain to libraries how to keep accurate courier statistics. After discussion, the committee decided to leave the information provided in the MEC Materials Handling Best Practices document section on Courier Service unchanged. The Circulation Chairman will ensure MALA has a copy of this section of the document.
- E. Circulation committee attendance—MEC Circulation Policy states that “Each member library is required to be represented at a minimum of four meetings each year. Currently 7 libraries are noncompliant and an additional 5 libraries have until their one-year membership anniversary date to become compliant. Keep in mind that it is vital to sign in with your name and library when you attend a circulation committee meeting in person, or after watching the meeting YouTube video, that you email the circulation chairman with your meeting takeaways in order for your library to receive credit.
- To verify your library's attendance status, email the Circulation Chairman at busser@casscolibrary.org

II. Old Business

- A. Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **51a—5/28/25**
- Periodically check that all “old” labels have been destroyed so that items do not accidentally receive an “old label.

III. Other

- A.** Questions were raised on how to note prior damage so you don't have to complete an Evergreen Item Condition Report each time you send an item to another library.
- Suggestions included: writing a short note about the damage inside the item.
 - Adding an Item Alert that would display when the item was checked in and checked out. Instructions on adding an item alert can be found at the end of these minutes.
 - Using a "Damage Noted" stamp
- B.** Heather Arnold asked for a quick poll on which libraries are charging fines and which libraries have gone fine free.

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New Item Status Created for MEC

Currently marking an item as Missing Pieces checks it back out to the last patron and changes the status of the item to Damaged. That status is more than a little confusing since the item isn't Damaged. **We now have the option to change the item status to Missing Pieces rather than Damaged.**

These are screen shots of what results after changing your item status to Missing Pieces and then marking an item Missing Pieces.

- **Item Status List View**

Barcode	Call Number	Due Date	Location	Item Status	Title
3007845297	DVD YEL	1/25/2024	Adult DVD	Missing Pieces	Yellowstone Season 5

• **Item Status Detail View**

Status	Missing Pieces
Due Date	1/25/2024
Checkout Date	1/11/2024 9:22 AM

- **Item Table showing the status and showing that the item is not holdable.**

SRL-UN	DVD YEL	Complete Set	3007845297	Adult DVD	DVD	06/26/2023	No	Missing Pieces	01/25/2024	01/11/2024
	Edit		View Edit							

To change your library's setting from Damaged to Missing Pieces, follow these steps.

1. Open **Administration > Local Administration**.

Booking ▾ Administration ▾

Workstation

User Permission Editor

Server Administration

Local Administration

Acquisitions Administration

2. Open **Library Settings Editor**.

Local Administration

Field Documentation

Group Penalty Thresholds

Hold Policies

Holdings Template Editor

Hopeless Holds

Item Alert Suppression

Item Alert Types

Item Tags

Library Settings Editor

3. Enter your library in **Context Location** and type **item status** in the empty field.

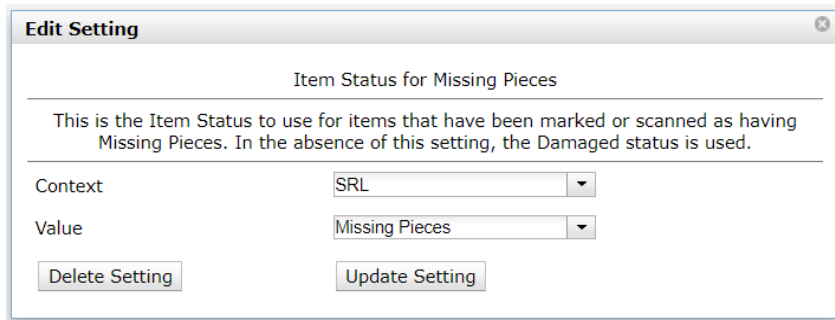
Open in New Window Refresh

Organization Unit Settings Context Location SRL Item status

* Indicates the setting is not inherited from the parent org unit at run time

Edit	History	Group	Setting
Edit	History	Acquisitions	Initial status for received items
Edit	History	Circulation	Hold Shelf Status Delay
Edit	History	Circulation	Item Status for Missing Pieces
Edit	History	Library	Change reshelving status interval

4. Open **Edit** on the **Item Status for Missing Pieces** line. This is what you will see.



The screenshot shows a dialog box titled "Edit Setting" with a close button in the top right corner. The main heading is "Item Status for Missing Pieces". Below this is a descriptive text: "This is the Item Status to use for items that have been marked or scanned as having Missing Pieces. In the absence of this setting, the Damaged status is used." There are two dropdown menus: "Context" with "SRL" selected and "Value" with "Missing Pieces" selected. At the bottom are two buttons: "Delete Setting" and "Update Setting".

5. Choose your library for the **Context** and Missing Pieces for the **Value**.
6. Click **Update Setting**.

Now, when you mark items **belonging to your library** as Missing Pieces, the status of the items will be Missing Pieces. When marking items that don't belong to your library as Missing Pieces, the status of the items will be the status that the owning library has set up.

Missouri Evergreen Circulation Committee Minutes

Tuesday, April 22, 2025

I. New Business

- A. New updated Checking the Transit List document—The circulation committee has written a new procedure for managing the transit list. Although the old instructions will still work, we believe the new procedure has less chance for errors because it allows libraries to cancel transits and mark items missing in one step. Libraries are encouraged to print the current instructions from the MEC website, if they want to continue using the old procedure. The new procedure will be posted under the Circulation Training Materials tab on the MEC website.
- B. Legacy reports
 - The legacy reports are now located in the new Evergreen reports module.
 - It is possible to change the reports URL to:
<https://cass.missourievergreen.org/eg/staff/reporter/legacy/main>
but with your library URL, to be able to access the old Legacy format.
However, it is "strongly encouraged" that we use the new angular reports.
- C. Message Bee Failure Report—MEC libraries are now able to receive a report identifying patrons whose SMS messages have failed.
 - After discussion, it was decided that the Failure Report should be sent out twice a month. The committee will re-evaluate after 3 months to determine if adjustments to the schedule are needed.
 - An informational document has been provided to the members of the circulation list serv explaining the meanings of the different failure reasons.
 - Double check that someone from your library is signed up for the circ list serv so corrections can be made if necessary.
 - **The circulation committee recommends that MEC libraries monitor the Message Bee Failure Report, contact patrons if the problem is not obvious and make any needed corrections on accounts that are experiencing failures.**
- D. CREATE DUPLICATE HOLDS library setting problems—No problems were reported after the implementation of patron initiated duplicate holds. One library reported they had not completed testing for one patron type and would let the Circulation Chairman know if they encountered any unexpected problems.
- E. Default hold notifications—The Circulation Chairman asked for each library represented at the meeting to reenter their library name and preferred choice for default hold notifications so that the committee had an accurate count.

II. Old Business

- A. Courier Label updates: A new version of courier labels have recently been released. Please make sure your library is using Get Connected MALA Courier LABELS version **50a-4/3/25**
 - Periodically check that all "old" labels have been destroyed so that items do not accidentally receive an "old" label.

Tuesday, April 22, 2025

Committee Members:

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Missouri Evergreen Circulation Committee Minutes

Tuesday, March 25, 2025

I. New Business

- A.** Damaged procedures involving other libraries—Dealing with damaged items between MEC libraries ALWAYS requires communication between libraries. Borrowing libraries should call or email the owning library to request that they mark their item Damaged. Please do not put grocery bills for Damage on patron accounts belonging to other MEC libraries.
- B.** Long in transit delay time and other edits—the committee worked on updating the Checking the Transit List document. Rhonda Busse will send the committee a copy of the document with currently agreed upon edits. The committee will then look at the rest of the document to see if there is anything else they think should be edited before the document is republished on the MEC website.
- C.** CREATE DUPLICATE HOLDS permission to allow patrons to place multiple holds on the same record—Equinox has activated this permission for Patron and Outreach profiles in the TEST server. They would like libraries to test/verify that patrons are able to place multiple holds on the same record for each patron profile your library uses (a staff member will need to test that multiple holds can be placed on an account from each of the patron profiles because our actual patrons cannot access the test server). If you are unable to place duplicate holds (**from the Patron's side**) or if any unexpected result should occur, please send an email to the circulation chairman at busser@casscolibrary.org The tentative date for this permission to be added to the production server is scheduled for Monday, April 7th. Instructions for verifying your library's current Maximum number of duplicate holds allowed setting, which works together with the Create Duplicate Holds permission, were sent with the circulation committee invitation and are included at the end of these minutes.
- D.** Default Hold Notices—A suggestion has been made that MEC no longer shows "Phone" as a preset default hold notification option when the Register Patron screen is brought up. "Phone" would still be available to select, but it would not be automatically checked when we open the Register Patron screen (libraries would need to opt their patrons into phone messages versus the current need to opt them out). Several libraries said they were still using automated phone messages while others felt like they would prefer to make it an opt in option instead of a preset default option. Libraries were asked to respond with their preference via the meeting chat option or to contact the committee chairman at busser@casscolibrary.org with their preference if the meeting video is viewed at a later date.
- E.** MALA requests that libraries do not zip tie courier bags.

II. Old Business

- A.** Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **49a—8/16/24**
 - Periodically check that all "old" labels have been destroyed so that items do not accidentally receive an "old" label.

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Tuesday, March 25, 2025

Verification of Maximum Number of Duplicate Holds Allowed Setting

The Circulation Committee has approved a request to grant permission for patrons to place holds for multiple copies of the same item.

Before Equinox implements this change, each library should:

1. Click on Administration > Local Administration > Library Settings Editor
2. Select your library in the Context Location dropdown
3. Use **Maximum number of duplicate holds allowed** for the Filter

#	Edit	History	Group	Setting	Context	Value
1	Edit	History	Holds	Maximum number of duplicate holds allowed.	CASS	12

4. Verify that the context is your library and the value is the number of duplicate holds your library is comfortable allowing your patrons to order (leaving this setting blank will cause your settings to default to the ME setting of 50 items)

Maximum number of duplicate holds allowed.

Maximum number of duplicate title or metarecord holds allowed per patron.

Context: Cass County (CASS)

Value: 12

[Update Setting](#) [Delete Setting](#)

5. If necessary, click Edit to change the Context or Value of this setting
6. Save changes by clicking Update Setting

Missouri Evergreen Circulation Committee Minutes

Tuesday, February 25, 2025

I. New Business

- A. Long in transit delay time—The committee discussed changing the suggested timeframe for marking items missing when clearing the Transit List. Current instructions recommend libraries check the Transit List weekly by setting a start date (perhaps your migration date) and an end date 4 weeks prior to the day you run the report. The committee decided to work by email to develop wording that would allow a more flexible timeframe. The Checking the Transit List document will be updated when the final wording is determined.
- B. The committee discussed and took suggestions and opinions on allowing patrons to place multiple copies of the same title on hold (think book clubs). The majority of libraries are in agreement that this would free patrons to better manage their own requests for duplicate holds.
 - The first step toward making this change would require Equinox to add the permission CREATE DUPLICATE HOLDS to patron user groups.
 - A second setting, **Maximum Number of Duplicate Holds Allowed**, affects how this works. Currently newer to the consortium libraries have been able to select the number they are comfortable with, but many if not most of the older consortium libraries either do not have a number selected or have it set to a consortium setting of 50 items.
 - Each library would be able to set the number of duplicates they would be comfortable with patrons ordering or they could choose to not offer any duplicate holds.
 - Action steps to be completed before the change can be made include a final check with Equinox for any recommendations on patron permission groups to be included or excluded, with the goal of including as many permission groups as possible, and producing instructions on how to check your library's Maximum Number of Duplicate Holds Allowed setting, which would be distributed before the change took effect.
 - Because each library could choose to opt in or opt out, the MEC Executive Board will allow the committee to determine when the new permission would be enabled.
- C. Upgrade to 3.13
 - The production server will be upgraded on the evening of Feb 26th. Version 3.13 will be up and running on Feb 27th.
 - The test server is updated so you can see/practice any changes

II. Old Business

- A. Aged Hold Protection—Libraries were encouraged to consider shortening the amount of time they choose for age protection. Several libraries discussed testing shorter age protection periods with many reporting that

Tuesday, February 25, 2025

shorter time periods have not adversely affected their patron's ability to check out new items. Libraries were also encouraged to take an item by item approach so new material is available to fill holds at their library but not sitting on their shelves for long periods of time before they are circulated to other member libraries.

B. MEC Users Conference Friday, March 21, 2025

- This year's conference will feature a variety of breakout sessions so that attendees can select the sessions that interest them the most.
- The tentative schedule may be found at <https://moevergreenlibraries.odoo.com/event/users-conference-2025-missouri-evergreen-consortium-12/agenda>
- The room reservation block for the MEC User Conference is now open. <https://res.windsurfercrs.com/ibe/details.aspx?propertyid=17259&nights=1&checkin=3/20/2025&group=25MOEVRGRN&lang=en-us>
- A link to the Users Conference has also been posted on the opening page of the MEC website.

C. Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **49a—8/16/24**

- Periodically check that all "old" labels have been destroyed so that items do not accidentally receive an "old" label.

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Missouri Evergreen Circulation Committee Minutes

Tuesday, January 28, 2025

I. New Business

A. MEC Users Conference Friday, March 21, 2025

- This year's conference will feature a variety of breakout sessions so that attendees can select the sessions that interest them the most.
- The tentative schedule may be found at <https://moevergreenlibraries.odoo.com/event/users-conference-2025-missouri-evergreen-consortium-12/agenda>
- The room reservation block for the MEC User Conference is now open.
<https://res.windsurfercrs.com/ibe/details.aspx?propertyid=17259&nights=1&checkin=3/20/2025&group=25MOEVRGRN&lang=en-us>

B. Courier issues

- 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.
- Follow MALA guidelines for placement of courier labels.
- Package audio-visual (AV) materials to protect cases. Sending AV without proper packaging is not acceptable.
- Do not zip tie delivery bags.
- Suggestion for possible use of Long(er) Names for internal transit slips NOT MALA labels. Heather Arnold or Rhonda Busse will work with Equinox to see if there is a way for longer names to be displayed.

C. Ask a cataloger questions

- In preparation for the User's Conference, Rhonda Busse asked for questions about cataloging that would be beneficial for circulators to know.

D. Removal of "Lost" fees when items are returned

- Libraries were encouraged to check their settings to verify that their void item billing settings are doing what their library intends.
- Removal of fees is controlled by multiple settings found in Local Administration > Library Settings Editor. (There are more settings that could affect fee removal, so look at all of the circulation settings that begin with the word Void.)

Void lost item billing when returned - If true, when a lost item is checked in the item replacement bill (item price) is voided.

Void lost max interval - Items that have been overdue this long will not result in lost charges being voided when returned, and the overdue fines will not be restored, either. Only applies if Circ: Void lost item billing or Circ: Void processing fee on lost item are true.

Void Long-Overdue Item Billing When Returned - Does the same when an item is marked Long Overdue and is returned.

Tuesday, January 28, 2025

- The Descriptions of settings can be found in Table 3. Circulations at this link:
https://docs.evergreen-ils.org/docs/latest/admin/librarysettings.html#settings_overview

E. Holds on age protected items

- As part of a larger discussion on transit times and holds management **the circulation committee recommends that MEC libraries override holds on age protected items if they want to allow their patrons to get on “the list”, with the understanding that those holds would not be filled until age protections have expired.**
- The MEC Executive Board will be working with Equinox to improve transit times and research the intersection of proximity settings with holds on age protected items and best-hold selection sort orders.

F. Upgrade to 3.13

- The production server will be upgraded on the evening of Feb 26th. Version 3.13 will be up and running on Feb 27th.
- The test server is updated so you can see/practice any changes

II. Old Business

A. Scotch removable tape

- Rhonda Busse will add the highlighted section to the Materials Handling Best Practices document's Sending Materials section.

Do not use tape on materials. Previously approved self-adhesive removable receipt paper **and Scotch Removable Tape** is permissible. Print the transit slip and place it in the transiting item.

B. Equinox purged 126,216 patron records that had been expired for at least 3 years. Thanks to all who worked on this project.

C. Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **49a—8/16/24**

- Periodically check that all “old” labels have been destroyed so that items do not accidentally receive an “old” label.

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Missouri Evergreen Circulation Committee Minutes

Tuesday, November 26, 2024 at 11am

I. New Business

- A.** Reminders were given to follow the Materials Best Handling Practices guidelines, found on the MEC website under Member Resources > Circulation Training Materials, to insure materials are transiting as safely as possible.
- B.** Heather Arnold informed libraries about the Holds Go Home setting, selected by the MLC group of libraries, with the hope that this setting would encourage libraries to select shorter age protection for their new material.
 - This setting is intended to force your library material to return “home” if a patron from the home library places a hold on it.
 - Currently MEC has a consortium level setting where holds will be filled based on library and proximity settings but would require that Holds Go Home after 6 months if a patron from the items home library has placed a hold on it.
 - Questions were raised about how this setting might affect transit volumes if more libraries changed to this setting.
 - The plan moving forward is to have the circulation committee, most likely with the help of Equinox, take a deeper dive into the potential benefits or challenges that implementation of this setting might cause for the entire consortium.
- C.** A proposal to allow holds to be placed on age protected items was discussed.
 - Most libraries would like to be able to place holds on age protected items even though the hold would not be filled until the protected time period had elapsed.
 - Multiple libraries expressed frustration that they have to tell patrons they are unable to place holds and that they will have to remember to request the item at a later date.
 - Libraries also expressed that it is sometimes difficult to make purchasing decisions because of the way the current hold system works.
 - Rhonda Busse will work with Equinox to explore what it would take to change this holds process.
- D.** Terri Moser proposed approving Scotch Removable Tape to secure MEC Item Condition Reports to items. Belinda Birrer reminded libraries that printing the condition report on self-adhesive removable receipt paper is permissible because that type of receipt paper has already been approved. After a brief discussion it was decided that Rhonda Busse would poll the committee members after the holiday, and if needed a recommendation would be made to the Ex Board.
- E.** Typically, a patron will have one active card, but there are special situations when a patron might have multiple active library cards. Katie Earnhart shared how Cape Girardeau Public Library uses multiple active cards to manage patrons taking advantage of their reciprocal borrowing agreement with Riverside Regional Library.

Tuesday, November 26, 2024

F. Message Bee update:

- On Monday, December 2, 2024, Equinox will mask the field asking for the cell phone carrier and remove the requirement that this information be filled in as part of the patron registration process.
- After some initial issues the message success rate is 97 to 98%
- Most failures are happening because something is actually wrong with the phone number (either entered incorrectly or the patron has a different number) or the phone itself (not accepting calls).
- MEC cannot turn messaging back on from our side. ***A patron must text "start" to 660-324-0279 to turn notices back on if they turned off text messages via Message Bee.***
- Rhonda Busse will follow up with Steve Potter, Ex Director, to try to facilitate the notification of libraries whose patron's messages have failed.

II. Old Business

- A.** Last reminder to begin working on deleting patron accounts that have been expired for 3 years.
- Each library is responsible for deleting accounts by December 31st. Equinox will purge the deleted accounts in January.
 - Use the template: Patron Accounts with Expiration Dates and Balance Owed (updated with balance less than or equal to with Group Lead field)
 - Complete instructions can be found on the Circulation Training Materials page of the MEC website.
- B.** Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **49a—8/16/24**
- Periodically check that all "old" labels have been destroyed so that items do not accidentally receive an "old" label.

III. Other

- A.** The December Circulation committee meeting is cancelled.

Committee Members:

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Missouri Evergreen Circulation Committee Minutes

Tuesday, October 22nd, 2024 at 11am

I. New Business

- A.** We began the meeting with a discussion of when it is appropriate to use copy/item holds:
- You need to send a specific copy to be mended or have something corrected with its catalog record
 - To move an item quickly between branches in your system
 - To not take every copy from a particular library when you need multiple copies of the same title
 - To more quickly fill a hold for a patron at your library when the item belongs to another library (why send it back just to have it be sent right back to your library)
- B.** Instructions and reminders were given for using and removing Blocks (Staff_CHR) in the Notes interface
- C.** We discussed how to note prior damage before you send an item to fill a hold, especially when you know the item has issues but is still readable/usable.
- Some libraries have a sticker/stamp that indicates previous damage
 - Some libraries write a note about the damage inside the front cover
 - Add item alerts so that frontline staff see the note as they check in and checkout
- Rhonda Busse will send instructions on how to add or edit item alerts to both the circulation and general listserv.
- D.** One month hold protection is now available
- E.** Ron Eifert has added 2 new lists to the contact information tab of the MEC website:
- MEC Libraries with Addresses
 - MEC Libraries with Addresses/Courier Hubs
- F.** A discussion about how to handle deceased patron accounts included several suggestions:
- Expire the account and add alerts to inform staff of the account status
 - Make the account inactive and eventually purge the account
 - Work with the person responsible for the estate, if needed, to see if they can find and return library material
 - If items cannot be found, consider checking them in a marking them missing. Several libraries “write off” the cost of unfound items.
 - If the patron has unfound items belonging to another MEC library, communicate with that library about what has occurred. The other library has the option to invoice or write off the cost of those items.
- G.** Updating patron accounts belonging to other MEC libraries.
- Please do not renew or modify patron accounts belonging to other MEC libraries.
 - The General Staff permission group is a global permission level—this permission will most likely be removed as part of the project to review circulation permissions. If your library has staff members with this permission level, even as a secondary permission, consider moving them to one or more of the regular cataloging, circulation or administration permission sets.
 - Unless you are a reciprocal library, please do not check out material to other MEC library patrons. Doing so can create problems with checkout periods, fines and non-resident fees.

Tuesday, October 22nd, 2024

H. Message Bee update from Steve Potter:

- Several libraries reported that they are not receiving hold notification texts and questions were raised about the time delay between when an item is received and when the notice goes out. Many libraries want to adjust the lag time for their email notifications to more closely match the lag time of text messages to eliminate confusion about whether patrons are being notified about the same or a different hold.
- Steve Potter will be working with Rogan, at Equinox, to resolve the problem of hold notifications not being sent, to find out what the time delay for sending out messages will be and if the texts will be sent as a batch.
- Rogan says that the "Send Test Text" button should continue to function
- All messages will be coming from this phone number 660-324-0279
- After Message Bee is up and we are sure everything is functioning correctly the Default SMS Carrier field will most likely be masked.

II. Old Business

- A.** Libraries were encouraged to begin working on deleting patron accounts that have been expired for 3 years.
- Each library is responsible for deleting accounts by December 31st. Equinox will purge the deleted accounts in January.
 - Use the template: **Patron Accounts with Expiration Dates and Balance Owed (updated with balance less than or equal to with Group Lead field)**
 - Complete instructions can be found on the Circulation Training Materials page of the MEC website.
- B.** Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **49a—8/16/24**
- Periodically check that all "old" labels have been destroyed so that items do not accidentally receive an "old" label.

III. Other

- A.** We welcomed several MLC libraries to their 1st Circulation Committee meeting. They of course had questions which the circulation committee members and other attendees were able to answer or clarify for them.
- B.** Resource sharing with MLC libraries has already begun. Their courier labels will all have MLC with 2 letters to identify the specific library. MLC-BR, MLC-FE, MLC-KI, and so on.
- C.** MEC now has 5,043,805 items!

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Missouri Evergreen Circulation Committee Minutes

Tuesday, September 24th, 2024 at 11am

I. New Business

A. Test Server Staff Accounts

- Remember to renew staff accounts in the Test Server 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.
- Liz Rudloff reminded libraries that you must also add new staff accounts to the test server. She also mentioned that she usually extends those staff accounts for 5 years.

B. Aged Circulation status update: settings are being made to ensure that information for the last patron who checked out an item will be visible until the item is checked out again. This could be a really short time or could be years depending on the popularity of the item. Previous patrons will be moved to aged circulation.

C. MessageBee update: work is proceeding with making sure everything is ready for the MessageBee SMS message implementation. The target date will be sometime in the last quarter of 2024.

D. MLC library short codes: The MLC libraries short-codes are going to appear as MLC-BR, MLC-FE, MLC-KI, and so on. Despite the common prefix of MLC, though, the nine member libraries have unique addresses. MLC delivery is not handled centrally. Items transiting to MLC-BR will need to be sent to the Brentwood address and so on. The Evergreen transit slips will reflect these unique addresses.

- Heather Arnold also gave a brief history of the MLC libraries for those who had questions about the libraries that will soon be joining the Missouri Evergreen Consortium.

E. Story time cards-If your library uses the words Story Time or Storytime, instead of a regular barcode number, the best practice would be to include your library's short code in the username. For example, PBSTORYTIME. This will prevent accidentally ordering materials on the wrong card.

II. Old Business

A. Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **49a—8/16/24**

- Periodically check that all “old” labels have been destroyed so that items do not accidentally receive an “old” label.

III. Other

A. MLC go live date is October 17th

B. Account Expiration discussion-A discussion was had on the pros and cons of 1 year renewals for patrons.

- Several libraries stated that in addition to using probationary patrons for people they could not verify addresses for, they used the 1 year expiration for “non-resident” patrons and a longer 2 or 3 year expiration period for their “resident” patrons.

Tuesday, September 24th, 2024

- Longer expiration periods are usually being granted when the library card is initially made or when a patron reports a change that would classify them in the “resident” status.
 - Rhonda asked for libraries to respond in the chat if they were interested in possibly changing the system wide renewal interval to a longer time period.
- C. Belinda Birrer reported that on Tuesday, Sept. 24th Poplar Bluff realized that at least one of their reports was not working correctly because of aged circulations. Depending on where information is pulled from, aged circulations could also possibly affect other circulation reports. Tony Miller, MEC Reports Chairman, is currently working with Equinox to figure out how to correct the issue. Tony or Belinda will send out the results of what Equinox finds or suggests on the general listserv as quickly as possible. In the meantime, you can reach Tony at: userservices@poplarbluff.org if you have questions or need help.

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Missouri Evergreen Circulation Committee
Minutes Tuesday, August 27th, 2024 at 11am

I. New Business

- A.** A discussion was held about what to do if a damaged item comes to your library for a hold. Suggestions included: retargeting the hold, contacting the owning library to have them place an item hold on the item or sending the item back in an envelope addressed to the owning library.
- Additionally, we discussed ways to indicate prior damage while at the same time allowing the item to circulate. Ideas included:
 - Writing a note about the damage in the item
 - The **owning library** taping an item condition report inside the item
 - Printing the MEC Item Condition Report on colored paper to make it easier for staff and patrons to see
 - Printing the MEC Item Condition Report on “Sticky” paper and placing it on the front of the item (Laura Jenkins from Polk County will send their template out to the circ and general listservs)
 - Adding item alerts for checkout and check in explaining current damage and alerting other libraries that it is OK to check the item out to their patrons.
 - Several libraries mentioned they have a stamp that says Damaged and has a line to write in what the damage is.
 - A suggestion was made to find out if it would be possible to add a refuse item option which would immediately send the item back to its home location.
- B.** Filling out MEC Item condition reports
- 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
 - Do not tape the item condition report to the item unless you from are the owning library
- C.** Marking an item as Missing Pieces checks out the item to the current or previous (if you accidentally checked it in) user.
- It is possible to add “Missing Pieces” to your item status list by going to Local Administration > Library Setting Editor > enter your library in the Context Location field > entering Item Status for Missing Pieces > click Edit > use the drop down menu to select Missing Pieces > click update setting to apply the change.
 - Instructions for marking an item as Missing Pieces may be found on p 28-29 of the MEC Circulation Procedure Manual
- D.** Sequoia Maintenance on 8/21/24 gave libraries the option to Hide the requested username field on Patron Self Registration. If interested in making this change:
- Go to Local Administration > Library Setting Editor > enter your library in the Context Location field > and enter Hide Requested Username field in Patron Self-Reg in the filter field > click Edit > change the value to True > click update setting to apply the change
- E.** Belinda Birrer from Poplar Bluff introduced the RFID task force. She explained that the task force is checking to make sure all current RFID libraries are able to read tags from the other RFID libraries to streamline the check in/check out process. She also let non RFID libraries know that the task force is exploring the idea of placing permanent RFID tags in items belonging to other MEC libraries. The

Tuesday, August 27th, 2024

benefits would be: less possible damage from temporary RFID tags and a reduced cost to future libraries if they chose to implement RFID at their library.

- F. Equinox is partnering with Unique to provide MessageBee, to MEC libraries, for more reliable text messages. The circ committee or at least a representative will most likely be asked to work on a task force to help determine settings, messages, etc.

II. Old Business

- A. Courier Label updates: Please make sure your library is using Get Connected MALA Courier LABELS version **49a—8/16/24**
 - Periodically check that all “old” labels have been destroyed so that items do not accidentally receive an “old” label.

III. Other

- A. MLC go live date is October 17th
- B. Aspen Discovery Layer
- C. Macee Jarvis from Scenic will be checking with Equinox about a potential bug when items are requested through the Actions menu.
- D. Questions were raised about how to handle Claims Returned cases between libraries. Best practice would be to notify the owning library that an item was marked Claims Returned. The owning library would then have the option to invoice. The patron would not be billed, rather the borrowing library would be responsible for the item’s replacement cost and any processing fees.

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Missouri Evergreen Circulation Committee

Minutes Tuesday, July 23rd, 2024 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.

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- 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 4/24/24
- Periodically check that all “old” labels have been destroyed so that items do not accidentally 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

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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>

Missouri Evergreen Circulation Committee

Minutes Tuesday, June 25th, 2024 at 11am

I. New Business

- A.** The committee finalized the updates to the Materials Best Handling document. A section about Courier Service was added which includes guidelines for placement of courier labels, clarifications about what to include in the monthly report as well as links to find the latest version of courier labels, how to report courier issues or order more supplies and the MALA ILL Courier Manual. See additions to the Materials Handling Best Practices document at the end of these minutes.
- B.** Questions about Record In-House Use—Item alerts (missing, damaged, lost etc.) will not display when using Record In-House Use. However, staff can catch these items if your library makes sure Item Status is one of the columns displayed in the Record In-House Use interface. Rhonda Busse will contact Equinox to see if there is a bug for this issue.
- C.** Reminders
 - Be careful to transit items safely—no open staples or broken containers
 - Patron requests for a library card at your library when the patron already has a card from another MEC library. The MEC Circulation Procedure Manual states:

A new account may be created, as long as patrons do not have outstanding charges on other Missouri Evergreen accounts. If other MEC accounts are found and there are outstanding charges that exceed your library's fines/fees threshold, ask the patron to pay or reconcile charges on their other accounts first before creating another account.
- D.** Courier label updates: Please make sure your library is using Get Connected MALA Courier LABELS version 47 dated 4/24/24
- E.** Training at your library—What is your library's process for training new employees? What additional resources would be helpful? Terri Moser commented that Lena Hernandez from Equinox has a very well thought out process for circulation training for onboarding libraries. Macee Jarvis from Scenic Regional will send out their library's training modules over the circ and general membership listserv. Rhonda Busse will look for training videos currently available from Equinox.

II. Old Business

- A.** The MEC Circulation Policy has been updated to reflect the clarifications on what types of materials should and should not be expected to transit between libraries.

III. Other

- A.** Terri Moser brought up questions about the reciprocal borrowing process among MEC libraries. The discussion centered around questions about pros and cons, how to handle fines/fees between libraries, and how to join the list if your library was interested in being a reciprocal library.
- B.** Questions were raised about how fees were handled on the MEC app. We "think" that the money would go to the library whose account the patron logged in to. Libraries were encouraged to run reports to find their items that have been marked lost and paid for.
- C.** Maryann Knorr raised questions about how often other libraries are performing inventories of their collection. Many libraries replied that inventory occurred on a two to three year schedule. Others replied that they do it yearly, one said that it had been since Covid while others said they did inventory section by section spread over the course of a

year or two. Most expressed relief that they were not the only ones that weren't doing it more frequently.

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Additions to the Materials Handling Best Practices document.

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 count of individual **outgoing** items for monthly reporting. 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>

Missouri Evergreen Circulation Committee

Minutes Tuesday, May 28, 2024 at 11am

I. New Business

- A.** New circulation committee member – Christal Haueter from Lebanon-Laclede County Library
 - B.** Courier label updates: Please make sure your library is using Get Connected MALA Courier LABELS version 47 dated 4/24/24
 - C.** Adair County resource sharing begins Wednesday, May 29th
 - D.** Equinox has identified a bug in the place holds process when holds are placed from the patron's record. This bug causes patron information to be deleted if you click the title to view holdings and also click "View" for a specific item. To place the hold, you currently have to reenter the patron barcode or relook up the patron by name. Fixing this bug would cause the patron's information to be retained so you don't have to rescan their card or relook the patron up. <https://bugs.launchpad.net/evergreen/+bug/2065913>
 - E.** De-dupe—miss merge issue reminder—Several years ago MEC did a de-duplication project with Equinox. This merged a lot of DVDs, TV series especially, onto the wrong records. Because of this, Equinox hit the rewind button and UN-merged all of those things. However, we were left with a resulting issue regarding parts holds. This problem has recently resurfaced when a library received a different season of a TV series than they requested even though the record showed the correct season. The cataloging community does have a solution, so if your library encounters receiving the wrong "part" inform your cataloger so they can work with their counterpart at the owning library to get the record corrected. If additional help is required, contact Kate Coleman, Cataloging Committee chairman or Liz Rudloff, the Consortium Cataloger.
 - F.** The Ex Board has suggested additional revisions to the Materials Handling Best Practices document regarding Courier labels. Information in green has been approved by the Ex Board and information in red reflects the addition they suggested.
11. Ensure that the correct courier label is attached to each package. **Coordinate with your MALA courier to use their preferred type of packaging if possible.** Check the MALA website at <https://www.malalibraries.org/courier-service/> - **connected** for the most current courier label version. Note that some libraries have courier service to more than one branch. The courier label should match the transit slip.
- 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 all visible shipping addresses from previous shipments.
 - Packages/boxes - Place a label on the top and on at least one side.
 - Do not use USPS totes

Several committee members agreed that we would rather not add something so specific because of the possibility of Henry Industries using different courier drivers and different courier vehicles. Rhonda Busse will contact MALA to find out what other suggestions they think should be included and work with the Ex Board to explain our reasoning for not including the addition.

- G.** Clarification to MEC Circulation Policy regarding what types of materials libraries should expect to circulate and what types of materials may be restricted to local use only. The board has approved the following changes to Section II. and V. which will be brought forward for a vote at the June General Membership meeting. If approved Section II. will state:

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Section II.

The fundamental cornerstone of the Missouri Evergreen Library Consortium is reciprocity. Therefore, it is an expectation of membership that **all items that circulate at the owning library will also be shared with patrons of Missouri Evergreen Consortium member libraries, except in cases when the item is not suitable for transit. More information about these items can be found in Section V: Responsibility of Owning Libraries.** Member libraries agree that Missouri Evergreen membership does not relieve libraries of the responsibility for purchasing the materials needed to meet the demands of local patrons.

And if approved Section V. will have this section added:

Section V.

Libraries should expect to lend materials as freely as they wish to borrow them. However, not all material is suitable for lending or transit. Member libraries are not compelled to lend materials which are: fragile, items containing many small parts, items that are overly large or irreplaceable, and reference or professional titles reserved for staff use. Equipment, kits, Library of Things, reference and local history items are examples of materials that may be difficult or undesirable to lend.

II. Old Business

- A.** The first set of emails have been sent to libraries that have not yet attended or viewed 4 Circulation Committee meetings in the last year.

III. Other

- A.** Heather Arnold asked for feedback on how other member libraries handle their home borrower/homebound collections. Most libraries responded that they have no special restrictions for their homebound patrons and request items the same way as regular patrons. Some had extended check out periods to account for the time it takes to mail material back and forth, and one library said they restricted homebound patrons to the local library system's collection.

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Missouri Evergreen Circulation Committee

Minutes Tuesday, April 23rd, 2024 at 11am

I. New Business

- A.** New circulation committee member – Heather Arnold from the Municipal Library Consortium
- B.** The committee looked at courier label best practices – things to consider
 - How often should libraries review courier labels?
 - How should libraries notify other MEC libraries about changes?
 - Where should these recommendations be placed?
 - Notes from the November 28, 2023 circ meeting
 - 1. Label each package sent by the courier with an appropriate address label.
 - 2. Courier bags: Place a label in the clear label display window
 - 3. 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.
 - 4. Packages/boxes need to be labeled on the top and at least one side.
 - Other Suggestions included:
 - 1. Add courier changes to the monthly circ committee agenda
 - 2. Send out changes to the general membership listserv as an “Actionable Item”
 - 3. Check the MALA newsletter/check with MALA before each circ meeting
 - 4. Send a courtesy copy of your library’s courier label to other libraries if anything changes
 - Rhonda Busse will create a recommendation to be reviewed by the committee.
- C.** Clarification to MEC Circulation Policy regarding what types of materials libraries should expect to circulate and what types of materials may be restricted to local use only.
 - Suggestions for item that could be restricted included: Reference, Professional, Historical, Fragile, Irreplaceable, Library of Things-Exploration Library etc., Locally historical, Kits (things with multiple parts), Items with a prohibitive replacement cost, easily damaged items and items that are difficult to send by courier ie fishing poles etc.
 - The committee decided to collaborate by email to come up with the final recommendation.
- D.** Displays – MEC proximity setting will pull from your library system 1st, libraries that share your courier hub 2nd and libraries from other hubs last. If you are ordering a large number of items, consider placing item holds on some titles so that everything is not taken from just a few libraries.

II. Old Business

- A.** Recommendation for time frame for billing other MEC libraries for lost or damaged material was passed at the general membership meeting. The Materials Handling Best Practices document has been updated.
 - The Ex Board wants this recommendation to be included in the MEC Circulation Manual – where is the best place to add it and do we include the specific reports listed?
 - Your library is not required to bill for these lost items, many libraries do not.

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- B.** MEC Circulation Policy requires all member libraries to attend at least 4 Circulation Committee meetings annually. If no one from your library can attend, it is possible to view the recorded meeting by clicking on the MEC YouTube link found on the main page of the MEC website and to read the meeting minutes by going to Member Resources > Circulation Training Materials > then scrolling toward the bottom of the page. To receive credit for alternative attendance please notify the Circulation Chairman.

III. Other

- A.** West Plains started resource sharing April 17th
- B.** Adair County Library (Kirksville) tentative go live date is May 2, 2024

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Missouri Evergreen Circulation Committee

Minutes Tuesday, March 26th, 2024 at 11am

I. New Business

- A. The recommendation concerning the time frame for billing other MEC libraries for lost or damaged material (change to the Materials Best Handling Practices document) was approved by the committee after allowing time for any further comments or corrections. The following changes will be presented to the MEC Executive Board for approval then brought to the Membership for a vote hopefully at the April Membership Meeting.

Invoices may be sent for Lost material if the item has been Lost for six (6) months but not more than eighteen (18) months from the date it went into Lost status. Items that are Lost and Paid for or Damaged may be invoiced immediately. Libraries may use the ME-Report template **Library Money > Lists > Circulated Lost Items Between Libs OR Library Money > Lists > List circulation Bills from Owning Branch to Circulating Branch** to find libraries to bill for Lost items.

- B. Equinox has identified a bug causing lost fees to remain on patron's accounts when an item already marked lost is later marked as missing pieces or damaged. <https://bugs.launchpad.net/evergreen/+bug/1989607> This bug fix would allow lost fees to be automatically removed (depending on your library's settings) when items are changed from one status to another without having to check the item in first and then change the status to missing pieces or damaged.
- C. Running reports in Equinox— Recently report response times have slowed significantly causing concern for even greater slowdowns as more libraries join the consortium. Upon investigation we found that Equinox is currently able to run 2 reports concurrently. Reports are placed in a queue and will run in the order they were received. After discussion, it was decided that Rhonda Busse will bring the topic to the Executive Committee and pass on the suggestions that we inquire if it would be possible for Equinox to increase the number of reports they can run concurrently as well as to request that Equinox provide a matrix showing high traffic/volume times so libraries could try to strategically time when reports were generated.
- D. The grouped accounts interface has added the ability to view all the group member's expiration dates. Use the column picker to add the column called Privilege Expiration Date to enable this feature.

II. Old Business

- A. MEC Circulation Policy requires all member libraries to attend at least 4 Circulation Committee meetings annually. If no one from your library can attend, it is possible to view the recorded meeting by clicking on the MEC YouTube link found on the main page of the MEC website and to read the meeting minutes by going to Member Resources > Circulation Training Materials > then scrolling toward the bottom of the page. To receive credit for alternative attendance please notify the Circulation Chairman.
- Libraries will be given time to contact the Circulation Chairman to update their status before being asked to create a plan to attend or view regularly scheduled Circulation Committee meetings.

Tuesday, March 26th, 2024

III. Other

- A.** West Plains Public Library's go live date is March 28, 2024 There have been a few glitches with West Plains resource sharing settings. Do not send items in-transit to West Plains. Equinox is aware and is working to fix the issue. Resource sharing with West Plains will most likely begin sometime in mid-April.
- B.** The MEC User's Conference will be held April 11-12 in Columbia, MO. It is not too late to register to attend in person or to receive links to view the sessions remotely.
- C.** A new Circulation Committee member is needed.
- D.** Diane Disbro's retirement. An open time was given to express appreciation to Diane for her efforts to make MEC great. Many expressed their gratefulness for her encouragement, the many questions she has answered and all the help she has given to MEC libraries. She will be missed!

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Missouri Evergreen Circulation Committee

Minutes Tuesday, February 27th, 2024 at 11am

I. New Business

- A.** The MEC Circulation Procedure Manual has been posted on the MEC website in two formats, Word and as a PDF. It is found under Member Resources > Circulation Training Materials
 - Thanks go to Diane Disbro for the original draft and to Jennifer Mathes (Jefferson County), Terri Moser (Neosho Newton), Lee Ann Santee (Barry-Lawrence) and Rhonda Busse (Cass County) for reviewing and editing.
 - Corrections or additions may be sent to Rhonda Busse at the email listed below.
- B.** Recommendation for time frame for billing other MEC libraries for lost or damaged material—After discussion among those attending these are the points the committee wants to address:
 - Bills should not be sent until items have been Lost for six months
 - Bills should not be sent for items that have been in Lost status longer than a year and a half (18 months) from the time the item first went to Lost status.
 - Items that are Lost and Paid for or Damaged may be invoiced immediately.
 - Rhonda Busse will write the recommendation for the committee to review before sending it to the Executive Board for consideration.
- C.** MEC Circulation Policy requires all member libraries to attend at least 4 Circulation Committee meetings annually. If no one from your library can attend, it is possible to view the recorded meeting by clicking on the MEC YouTube link found on the main page of the MEC website and to read the meeting minutes by going to Member Resources > Circulation Training Materials > then scrolling toward the bottom of the page. To receive credit for alternative attendance please notify the Circulation Chairman.
- D.** Please do not transit items that you know are missing pieces.
 - The Materials Handling Best Practices states:
Check the item's condition before sending it to the borrowing library. Do not send items that are fragile, in poor condition or incomplete.
 - If you receive an item with missing pieces, send the item back to its home location and ask the library to mark their copies to only circulate in house.
 - Liz Rudloff, Consortium Cataloger shared that the cataloging committee will be looking at a consortium wide guideline for cataloging sets that are missing a pieces if the owing library wants to keep them.

Tuesday, February 27th, 2024

II. Old Business

- A.** Permissions Project—Rhonda Busse asked that any libraries, who would like to use a tiered circulation permission structure, send suggestions for which permissions should be excluded for tier 1 Circulators that would be granted to tier 2 Circulation Administrators to Diane Disbro, Belinda Birrer or Rhonda Busse.

III. Other

- A.** West Plains Public Library's go live date is March 28, 2024
- B.** The Annual MEC Users Conference is April 11th and 12th in Columbia, MO
- C.** The March meeting will be Diane Disbro's last Circulation Committee meeting. Many of us will probably want to express our appreciation for her service to MEC.

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Missouri Evergreen Circulation Committee Meeting

Minutes Tuesday, January 23rd, 2024 at 11am

I. New Business

- A.** Evergreen will update to 3.11 Jan 24th. Quick overview of changes.
 - Strict Barcode check box
 - Ability to restore, edit and delete archived notes.
- B.** New item Status created for MEC—**Missing Pieces**
Instructions were given for how to add a new Item Status that more clearly reflects the status of an item that is Missing Pieces.
- C.** Permissions Project—Differences between Circulators and Circulation Administrators
A list of permissions that should not be included in the Circulators permission list was discussed. Items mentioned included: Forgive Fines, Void This Bill, Adjust (a bill) to Zero, Purging patrons and possibly changing Shelving Location.
- D.** Reconciling the Hold Shelf
Diane explained the process for keeping the Hold Shelf up to date. She will be sending the name of the report that can be used to see everything on your library's Hold Shelf including the date it should have been removed.

II. Old Business

- A.** Deleting/Purging project for Missouri Evergreen was completed on Jan 8, 2024
 - Equinox reports that the purge took well over 16 hours to complete and **267,468** users were purged from the MEC database.
- B.** 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.
 - 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.
- C.** Evergreen Circulation Procedure Manual committee
 - Editing of the Claims Returned section was completed.
 - A discussion was had about what to include in the Appendix. The decision of made to change the Appendix to contain a list of links with helpful information such as Materials Handling Best Practices, Checking the Transit List, Hopeless Holds etc.

III. Other

- A.** MEC has recently received signed MOU's from the 9 St Louis libraries currently in the Municipal Library Consortium.

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