

## Circ Committee Meeting 1/13/26

Happy New Year!

**Homebound Delivery:** Krishna Brodigan from the Outreach department joined the meeting to explain the Homebound Delivery By Mail service that WLS offers.

- Homebound Delivery was a grant funded program that was in the testing stage with a few select patrons. The patrons who used it were very appreciative of the service.
- This service is not being widely advertised - but if you have homebound patrons in mind - please contact [askoutreach@wlsmail.org](mailto:askoutreach@wlsmail.org) for more information.
- The library will need a designated person to place the holds for the patron:
  - The holds pickup library should be set to WLS.
  - WLS will then mail the books to the patron and include a return, postage paid envelope so the patron can then mail the items back.
  - The items can *probably* go to a PO box and the patrons should not have to go to a post office to mail the items back.
  - The website: [Home - WLS Senior Resources](#) has more information.

**Test Text Message Delay:** The “Send test text message” button in the patron profile Edit screen *does* work. However, there is a significant delay in how long the test message takes to actually go through.

- The delay is usually about 5 minutes which could be awkward with a patron standing in front of you.

- If you find that the test text doesn't go through at all, please put in a helpdesk ticket.

**End of Year Circulation Reports:** The reports are available in "Shared Templates" in the reports module in Evergreen.

- Go to Shared Templates □ evergreen.reports □ Collections □ Year End
- Allison Pryor did run a system wide report already so if you are interested in seeing those stats, please contact her.
- If you or anyone at your library is interested in Reports Training, Allison or Lindsay is happy to provide it to you.
- Also, if there is a training you feel would be beneficial for multiple staff people at your library, please reach out to Allison Pryor. She is happy to come to your library.

**IT Wiki:** The IT Wiki is in the process of being redone. Allison's goal is to have it ready and available by the end of March.

- In the meantime, when you are browsing the current IT Wiki, please pay attention to "pain points" (what is lacking, what doesn't make sense, what you hate, what you like,) - and let Allison know!

**Evergreen Buckets:** Buckets can be confusing and sometimes do not operate in the way one would expect them to. For instance, items that were manually removed will show up in item buckets which can be confusing.

- It's possible that these could be duplicate items remaining in the buckets.

- BUT, if you see this happening - make the bucket shareable, and send Allison or Lindsay the Bucket ID so they can take a look.

**Evergreen Training:** There was a Buckets Training offered on January 14. Allison is working on creating a designated page for the current and new IT Wiki, but in the meantime - if you would like to view the powerpoint or the recording - email Allison (apryor@wlsmail.org)

- Evergreen Community Training: Lindsay has scheduled an Evergreen Community training on January 28. This will go over the Evergreen Community (we are all a part of) and why it's important in terms of bugs, development wishlists and more. You can register [here](#).
- Reports Training: For anyone new or overwhelmed by reports, contact Allison and Lindsay. Allison is happy to come in person, or schedule a virtual one-on-one training to go over the basics and get you set up to run the reports you need!
  - Lindsay is planning on offering a more advanced training for everyone sometime next month (February).
- General Training: If you or your team needs specific training or a refresher - contact Allison! She'll make it happen. Whatever you want, whatever you need.

**2026 Holidays in Evergreen and Aspen:** Please check that all 2026 holidays have been entered into the Evergreen Closed Dates Editor and also into Aspen.

- In Evergreen, putting in the closed dates ensures that holds do not expire and items are not due on a date that the library is closed.
  - If your library ends up being closed for an unforeseen circumstance, for example a snow day, you can input that in retroactively. Just follow these steps:

- Go to Administration  Local Administration  Closed Dates Editor  Add Closing  choose the date from the calendar next to the date field  put in the reason (ex: Snow day)  **Check both “Emergency” and “Process Immediately.”**  OK
- For Aspen, Go to Primary Configuration  Library systems  yourlibrary  and holidays

If you need help with either Evergreen or Aspen please contact the helpdesk. Allison and Lindsay are happy to help.

**Checkin Modifiers:** Please turn off “Retarget Local Holds” and “Retarget All Statuses” if you have these checkin modifiers on. These modifiers should only be used for **brand new items** that have **not circulated yet**.

- Anyone working at the circulation desk, doing normal everyday circulation transactions does not need these modifiers on. Having these modifiers on, can confuse Evergreen and we don’t want that.
- The only modifiers you need to have on are **Auto-print hold and transit slips** and for fine-free libraries: **Amnesty Mode**.

**Lost Cards:** When a barcode is replaced on a lost card, the old number hangs around in the background of Evergreen, and this can lead to privacy concerns. Lindsay cannot remove these old IDs.

- This needs to be done through development with Evergreen.
- Lindsay believes there is a bug report for this and she will look into it as having those old IDs doesn’t really serve a purpose.
- There could be ramifications for Libby but hopefully when the patron gets a replacement card, staff is taking note of the old ID then and merging the 2 IDs in Overdrive.

## Discussion and Q&A

**Lost Items/fines:** CHA mandates that patrons take care of lost items otherwise their borrowing privileges may be suspended. The Circ. Committee members who were present agreed staff should be having conversations with patrons who have lost items on their records and not just leaving them there indefinitely.

- There is a report that can be run if you would like to clean up old fines on patron records. Go to Shared Templates  evergreen.reports  Bills & Payments  Bills outstanding. If this report does not give the information you need, please let Lindsay know.

***Mona's Eyes:*** There was a discussion about a recent release called *Mona's Eyes* and how libraries are covering the book as the cover contains oversized illustrations. It seems that libraries were just covering it as usual. Maybe the illustrations can be found online.

**Library Email Notifications:** If you need to change the email address that your library's notices are sent from, please submit a helpdesk ticket.

**Patron Credit:** CHA wants to use the patron credit in Evergreen for their patrons to use for printing. For instance, the patron pays in advance, and the credit is put on their Evergreen account. That credit then can be used for printing. It would only be for CHA patrons. Lindsay will investigate the best way to do this.

**Tracking Payments:** We need a better way to track payments that are paid online as sometimes, libraries aren't aware of something being paid for until 30 days or more later and the transaction is now gone from the patron's record.

- There is a report that libraries can run under: Shared Templates  evergreen.reports  Bills & Payments  online bill pay or online bill pay lost materials.
- There was a suggestion that messaging should also be added to the portal that asks the patron to contact their library to let them know they paid for something.
- There are talks at WLS to extend the 30 day period of anonymization for bills that were paid. All agreed that this would be *extremely* helpful. Also running recurring reports on a regular basis to capture bills that were paid before they are anonymized is helpful.
  - Lindsay and Kim Naples brought this topic up at the Technology Committee and PLDA. They are working on drafting more information so that an extended period can be voted on by directors.

**Evergreen Slowness:** If any staff notice Evergreen slowness or weirdness, please let the helpdesk know.

- POR and LAR both shared that they are noticing long load times for patron searches - specifically when searching by phone numbers.
- UPDATE FROM LINDSAY: "I researched the phone search issue, and with a recent Evergreen update, phone searches now include ALL phone numbers, including the hold notification phone and SMS default. The hold phone numbers add extra processing burden, because they are not saved directly in the patron records, which causes a longer processing time."

## **Announcements**

Ned at DOB is retiring at the end of the month. Donna will be attending the meetings going forward. Congratulations, Ned - we'll miss you! And, welcome, Donna! We're happy to have you!

Marie Trapasso is the Head of Circulation at both MTP and MVA. Please contact her with any issues pertaining to either library. Go, Marie!

There is a new Senior Clerk at NEW who will be attending future meetings. Welcome aboard!

If you need your library's Circulation Contact on the spreadsheet updated, please let Allison P know.

**The next Circulation Committee Meeting is scheduled for March 10.**

**The next Tech Services interest meeting is February 10.**

Meetings will continue to be held on Tuesdays.

Respectfully Submitted,

Marie Trapasso

MTP/MVA