

Circ Committee Meeting Minutes 9/8/26

Topics/Updates/Demos

Phone Notifications: iTiva is being discontinued at the end of the year. This means that patrons who have phone calls as their holds notification preference will need to change to either email or text or both. This includes the automated renew-by-phone number: 914-674-4169. Patrons also will not be able to call the phone number to renew their items. They can still reach out to their home library to renew.

- Allison stated that system wide, only 180 patrons seem to call to renew their items so that's not a huge amount of people.
- WLS will have messaging on the website alerting patrons to this change. Please reach out to WLS if you would like a list of patrons who have "phone" as their notification preference.
- WLS also recommends removing the phone call option from each library's library card application. Lindsay will reach out to Equinox to see about removing it from the online registration form.
- The senior population is the group who seem to have phone calls as their preference and all suggestions are welcome as to how to keep them in the loop regarding their holds, etc.

Clearing Item Stat Cats (Tech Services Staff): There was a bug in the Holdings Editor that would not clear out old stat cats if they had been changed or deleted. This has now been updated.

- Please reach out to WLS if you want a report of items that have incorrect or multiple stat cats assigned to them.
- As an aside: if a library has a staff person that cannot edit any items, please have supervisors reach out to WLS to update their permissions as needed.
- Also, if staff are reporting that their templates are not applying correctly, please create a helpdesk ticket as that could be due to any number of things that WLS would have to check on.

Last Edit Date vs Status Changed Date: In Item Status, the last edit date will now show you when the record was modified in some way which is different from the Status Changed time.

- Status changes happen when an item is checked in, checked out, etc.
- Another library can only edit your item's status by marking something missing, damaged, checking it in, etc.
- The columns you can add to see this information are: Status Changed Time and Date Last Edited.

Libby Blocked Expired Patrons: On August 1, Libby blocked expired patrons and gave them a message to contact their home library. As a result, there has been an increase in the number of patrons needing to renew their cards.

- If a patron comes to your library but is another library's patron, please verify their address and renew their card. Please do NOT send them back to their home library to renew their card. It is standard practice to renew any patron's card who is standing in front of you.

Reminders:

Indicating Damage on materials: Please do not ***write*** in another library's materials that there was damage noted.

- Rubber banding a note or a post-it works well. If the owning library wants to write in their own materials, that's fine.
- Also please be mindful if you are taping a note to another library's materials as removing tape can damage items as well.
- Please also do not use patron hold slips or any paper that has identifying information on it when writing notes. This jeopardizes patron privacy and is not good practice.

There was a discussion about being able to put alerts on another library's items. However, if an item is damaged, and an alert was put on the item, it's not going to get checked in for the staff person to ever see the alert. The easiest way to alert staff and patrons to damage is to put a physical note somewhere on the item. Some libraries also have their own "Damaged" slips which is another viable option.

Discussion/Q&A:

Pre-Cats for Another Library's Items: Rye has specifically asked that pre-cats not be created by other libraries for their items.

- If any other libraries would like to be exempt from this, please reach out to the helpdesk. The Circulation Committee spreadsheet will be updated to include a column of which libraries do not want pre-cats made of their items. That spreadsheet can be found here:
https://docs.google.com/spreadsheets/d/1qfk4FDMflsEBtaX_T5x9cldCPapYFqTFV8zd2Br4EsU/edit?pli=1&gid=0#gid=0

If you have scanned an item multiple times from another library and you are getting the pre-cat pop-up, you may want to re-target the hold, if there is a hold, and send it back to

the owning library explaining the situation.

Sending Cash Through Bins: Some libraries encourage patrons who are paying by cash for a lost or damaged item to go to the owning library or to pay online.

- Some libraries have a QR code at the Circulation Desk that takes the patron directly to the online bill pay site. Some libraries will take the cash and item information and give it to their Business Office and their Business Office will cut a check to the owning library.
- If you are sending cash through the bins, please send it in an envelope that is big enough that it won't get lost in amongst the books in the bins and address it to the Head of Circ at the owning library. For example: MTP Attn: Head of Circ

Holds and Clearing Expired Holds: There was a question as to whether libraries are pulling items that are on their holds list every day or as close to every day as possible.

- Libraries should be checking the Pull Holds List every day!
- Some libraries have noticed that items will sit as "available" for days before they are put in transit to fill a hold.
- Also, please clear expired holds on your holds shelf at least once a week. Lots of libraries clear expired holds every day as part of their opening procedures.
- Instructions on pulling holds can be found here:
https://it.westchesterlibraries.org/help-and-faq/evergreen-help-and-faq/evergreen-hold-essentials/#holds_pull_list

"Clear These Holds" Button: This problematic button is still hanging around causing issues. Lindsay asked Equinox if this button could be disabled ASAP.

- A fix should be implemented within the next few weeks which would disable that button permanently. Fingers crossed.

Self-service Holds Shelves and Items Not Checked Out: If a patron has taken their holds without checking them out, libraries should contact the patron.

- If the patron has the items, please check the items out to patron's card.
- If you cannot get in touch with the patron or they say they don't have them, you can mark them missing. You may also want to have a conversation with the patron if you notice it's a repeat offender.
- Checking the items out or setting them to missing gets the items out of "Hold Cancelled" status or "Expired on Holds Shelf" status and holds the patron accountable for having the items.

Announcements:

- NOR (Ruth Keeler Library) is back open
- YCR is temporarily closed for renovations. If you try to place a hold on an item and the hold doesn't go through, it may be because YCR is the only library that owns that item.
- LAR has a new Director- Jessica Veissy
- NEW has a new Senior Clerk- Brian McLellan

Our next meeting is scheduled for November 10.

Respectfully Submitted,

Marie Trapasso

MTP/MVA