DALNET Circulation Standards Task Force Meeting
January 24, 1991 at Detroit Public Library

Minutes

Present: Gerry Bosler, Louise Bugg, Eric Condic, Helen Ma,
Jeff Pearson, Fran Young.

1. Minutes from January 10, 1991, Meeting Correction

The heading for item 4. should read ..."Name Differences"
rather than ..."Home Differences."

2. Circulation Forum Section

The Detroit Public Library was selected as the site for the all
day Circulation Forum, to be held on Monday, April 8. The
Explorer's Room will be used. Free parking will be available
that day in the DPL Staff parking area. Coffee and donuts will
be provided.

Helen will investigate options and costs for providing an
optional deli lunch. Payment in advance would be required.
Those who pay for the lunch will have an indication on their
name tags. Every effort will be made to keep costs to attendees
low to encourage participation. All staff involved with circula-
tion in the DALNET/NOTIS environment will be welcome to attend.

The program was reviewed in detail. All speakers have been con-
firmed except Louann Stewart, OU. Speakers making joint presen-
tations will be responsible for coordinating their sessions.
The morning's sessions are primarily presentations with some
time for questions and comments. The afternoon's sessions are
primarily discussion sessions, with briefer presentations aimed
at opening discussion from the audience.

Louise will revise the registration form, including a map to
DPL Main showing parking. A more detailed agenda will be
created for the Task Force.

3. Infopass Procedure

The document will be re-named "Recommended Procedures..." to
clarify its intent. This is not a policy document, but rather a
procedure for handling Infopass patrons within the shared
DALNET NOTIS patron file. It is expected that individual DALNET
libraries may vary these procedures to meet their local
policies.

4. Note Field Standards

Jeff distributed a first pass "core list" of 5 to 10 coded
patron notes. He will revise the list based on the discussion
so Task Force members can review it before the next meeting.

5. "Available" and "Needed" Notice Wording

Dody Fox is still working on these changes. Sample notices with the new wording should be ready for review at the next meeting.

6. SAS Reports -- Circ Statistics by Call Number Range

The group began work on specifications for the next circulation SAS report: "Circulation statistics by call number range."

- Need count of circulation by location code (4,4), totalled by library building, within a specified time period;
- Both the circulation history file (counting only regular dis-charges, NOT browses) and the action file (counting active charges) should be included;
- Only circulations to "real people" should be counted, however, each library should be able to specify which of their patron categories represent charges to "real people";
- The report should be available monthly, possibly with "run-ning cumulation" and "percentage change from previous month" columns
(taking into account three different fiscal years within DALNET);
- Counts should be done for call number ranges in LC, DDC, and SuDOCS classification systems. Collections with accession-type numbers or unclassified should have a total for all items with-out any further breakdown;
- Circs for both linked and unlinked items should be included;
- The subset of the report should also be available upon special request for a specific library.

Task Force members agreed to bring call number ranges they already had for statistical reporting to the next meeting.

7. Other

Macomb requested a sample report of delinquent patrons owing more than $1.00, to help them determine where to set the cutoff for the "followup" bills.

UD reported a problem with fines not calculating for faculty overdues.

The next Task Force meeting is scheduled for Thursday, March 7th at 2:00 p.m. in the WSU Purdy Library, Dean's Conference Room.

Notes by
Louise Bugg
January 28, 1991

Attachments
LB91-112

DRAFT No. 2

DALNET CIRCULATION FORUM

A session sponsored by the DALNET CIRCULATION STANDARDS TASK
FORCE for Circulation Staff from all DALNET Libraries.

WHEN: April 8, 1991, 8:30 a.m. - 3:30 p.m.
WHERE: Detroit Public Library, Explorer's Room
REGISTRATION DEADLINE: March 25, 1991
COSTS: Deli lunch (optional) $ FREE PARKING
CONTACT FOR FURTHER INFO: Jeff Pearson, WSU, 577-4480

PLEASE BRING SAMPLES OF Library cards, Forms, Training
Materials, Brochures for Handout Table.

FORUM SCHEDULE

Time	Session
8:30 - 9:00	Registration and Coffee
9:00 - 9:15	Welcome and Introductions -- Eric Condic, OU, moderator
9:15 - 10:00	DALNET Circulation Standards -- Task Force Members
10:00 - 10:30	Circulation SAS Reports -- Louise Bugg, Jeff Pearson, WSU
10:30 - 11:00	Break
11:00 - 12:00	Barcoding and Linking -- Circulation on the Fly -- Louann Stewart, OU; DPL's Linking Method -- Helen Ma, DPL; NOTIS Batch Linker Program -- Louise Bugg, WSU
12:00 - 1:00	Lunch
1:00 - 2:30	Circulation Desk Workflow/Management -- Gerry Bosler, MCC, moderator of discussion session led by a panel, on various topics, including overdues, bills, discharge, library card waiver, patron registration issues.
2:30 - 3:00	Circulation Staff Training -- Terry Potvin, DPL; Fran Young, UD
3:00 - 3:30	NOTIS Circulation Enhancements -- Louise Bugg, WSU

DALNET CIRCULATION FORUM -- REGISTRATION FORM

Name:———————————————————————Phone No:—————————————

Library Name/Address————————————————————————————————

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$——————— for deli lunch (optional) enclosed. Make checks payable
          to: Jeff Pearson.

Submit topics for circ desk management discussion session on back of
this form.

Return by March 25, 1991 to: Betty Franks, Systems Office, Wayne State
University, 242 Purdy Library, 5265 Cass, Detroit, MI   48202.

DRAFT No. 1

DALNET CIRCULATION FORUM

Detroit Public Library, Explorer's Room

April 8, 1991, 8:30 a.m. - 3:30 p.m.

Detailed Agenda

8:30 - 9:00   Registration and coffee
9:00 - 9:15   Welcome -- Eric Condic, OU, moderator
9:15 - 10:00   DALNET Circulation Standards -- Task Force Members
               · Patron record, incl. resolving patrons name differences
                 and SSN policies -- Eric Condic, OU
               · Item Record -- Jeff Pearson, WSU
               · Course Reserve -- Julian Stam, WSU
               · Infopass -- Fran Young, UD
10:00 - 10:30 Circulation SAS Reports -- Jeff Pearson, Louise Bugg, WSU
               · Delinquent patron report
               · Followup bills
               · Circ statistics
10:30 - 11:00 Break
11:00 - 12:00 Barcoding and Linking
               · Circulation on the Fly -- Louann Stewart, OU
               · DPL's Linking Method -- Helen Ma, DPL
               · NOTIS Batch Linker Program -- Louise Bugg, WSU
12:00 - 1:00   Deli Lunch (optional)
1:00 - 2:30   Circulation Desk Workflow/Management
                       Panel discussion with audience moderated by Gerry
                       Bosler, MCC, including:
                       · Overdues, Bills, Fines -- Eric Condic, OU;
                                                   Jeff Pearson, WSU;
                       · Library Card Waiver -- Jeff Pearson, WSU;
                       · Discharge Problems/Procedures -- Fran Young, UD;
                       · Patron Registration Issues -- Terry Potvin, DPL;
                                                       Gerry Bosler, MCC

Registrants may suggest additional topics in advance of this session.

2:30 - 3:00   Circulation Staff Training -- Terry Potvin, DPL;
                                             Fran Young, UD
3:00 - 3:30   NOTIS Circulation Enhancements -- Louise Bugg, WSU

L. Bugg
1-28-91

RECOMMENDED PROCEDURES FOR PROCESSING INFOPASSES

1. Make sure the patron has a valid INFOPASS:
   a. INFOPASS form is the current SEMLOL form
   b. form is filled out completely and correctly
   c. INFOPASS form valid for ten days from date of issuance;
      extension at the discretion of the institution

2. Determine if the patron already has a patron record in the
system. Search by both name and social security number.

3. If the patron has a patron record, create a home unit
subrecord. If the patron has no patron record, create one,
observing the patron record recommendations submitted by the
DALNET Circulation Standards Task Force.

4. Place the patron category code for guest borrowers or INFOPASS
patrons appropriate for your institution in the patron category
field of the patron record.

5. Type the next day's date in the "ID EXPIRES" field.

6. Enter the barcode from a Guest Borrowers card in the "PATRON
ID" field. Make sure record completely updates.

7. Have the patron sign his/her new library card, and inform them
that the card is theirs to keep but cannot be used again unless
presented with another INFOPASS.

Institutions may chose not to issue guest cards, but to enter the
barcode number from a barcode strip in the "PATRON ID" field, and
then discard it. If an INFOPASS patron already in the system
presents another INFOPASS, desk personnel would have to retrieve
the Patron ID number from the Patron Record in order to charge
books.

8. If the patron is using a previously issued INFOPASS library
card, check their Patron Charges Index (or HAS screen) to
determine if they already have books charged from your unit. They
may only charge up to and including the allowable limit of books.

9. Once the books are charged, write the item ID numbers from the
charged books on the INFOPASS form, or attach a copy of the HAS
screen. Stamp the due date on the form.

10. Retain and file the INFOPASS form appropriately.

Note: The system will allow any number of books to be charged if
the patron has under the allowable limit charged at the beginning
of a charge session. If the patron already has the allowable
limit charged the system will block any more charges. It ~~might be~~ is
a good idea to notify INFOPASS patrons who charge the limit that
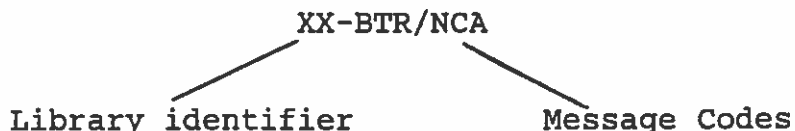they must return books before another INFOPASS can be used.

Also, a patron may wish to use an INFOPASS at more than one unit
of a multi-unit institution. The   unit   that   gets   the INFOPASS
first should indicate on the form how many books have been taken
out initially (some written indication beyond the item ID
numbers), make a copy of the INFOPASS for the library's records,
and give the INFOPASS back to the patron. The patron may still
only take out the charge limit with an INFOPASS. Indicate this to
the patron when you return the INFOPASS to them.

Note: The above instructions reflect suggested guidelines for the
processing of INFOPASSES. Variations from these procedures may be
necessary to accomodate the policies of individual institutions.

J.P. - fourth draft 1/28/91

SUGGESTED CORE LIST

CODES FOR PATRON RECORD NOTE FIELDS

XX-BTR/NCA

Library identifier   Message Codes

MESSAGE CODES

XX-ACA	Account sent to collection agency
XX-BBC	Blocked for bad check
XX-BFO	Blocked for overdue book
XX-BTR	Blocked transcript records
XX-C__	Contact (followed by initials of person to be contacted, e.g. CJP means "contact Jeffrey Pearson")
XX-FSS	Faulty social security number
XX-HRB	Holding recalled books--must return
XX-MPR	Multiple patron records; indicates if patron has both tape-loaded and keyed patron records
XX-NCA	Needs correct address
XX-PC_	Patron claims return, and number of claims. Used to keep track of the number of times a patron claims to have returned undischarged books. For example, "PC2" means the patron claims to have returned undischarged books on two separate occasions.

CODE ARRANGEMENT

1. Coded notes from a single location are separated by a virgule, or "slash". For example, "WP-NCA/BTR" means "Wayne State Purdy-needs correct address, blocked transcript".

2. Coded notes from different locations are separated by a coma. For example; "WC-NCA,WP-BTR" means "Wayne County-needs correct address, Wayne State Purdy-blocked transcript".