

DALNET Circulation Task Force Meeting
July 25, 1990

Minutes

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

1. NOTIS Circulation Management and Statistical Reports

The group reviewed input from DALNET Library Project Managers for the draft priority listing of NOTIS Circulation reports to be developed. The top two priorities for reports were identified in each of three categories: (1) patron reports, (2) statistical reports, and (3) course reserves reports. Louise will write a memo to forward these development priorities to the DALNET Board.

2. Infopass Policy/Procedure

Jeff Pearson distributed copies of Wayne State's procedure for handling Infopass patrons on NOTIS. Members of the group exchanged information about their Infopass policies. They will review the WSUL document in light of their own procedures for the next meeting. Jeff will test the NOTIS patron record for limits on the number of patron groups, categories, and subrecords, to help determine needed DALNET policies. It may be necessary (or at least highly desirable) to re-use Infopass ID's issued to a specific patron to conserve NOTIS record space. Findings will be reported at the next meeting.

3. Social Security Number Policies

Issues identified in handling social security numbers (SSN's) in the shared DALNET patron file were:

- (1) patrons who refuse to give their SSN's;
- (2) the use of "pseudo" SSN's for patrons without SSN's;
- (3) patrons who request their SSN's be deleted from their patron records; and
- (4) duplicate, or multiple, SSN's.

The group came up with these recommendations:

- (1) no patron records without SSN's should be tapeloaded into the DALNET patron file;
- (2) "pseudo" SSN's should not be entered into DALNET patron records in the SSN field;

- (3) DALNET library staff may delete the SSN on a patron's record at the request of the patron;
- (4) if a patron has multiple records with more than one SSN, DALNET library staff should ask to see a social security card to verify the correct number. Since each patron should have only one record, the one matching the social security card number should be retained;
- (5) if more than one patron has the same SSN, DALNET library staff should ask to see each one's social security card. If both patrons were issued the same number, they should be referred to the Social Security Office. The DALNET patron file will prevent more than one record with the same SSN from being created;
- (6) SSN's should not be updated via tapeloads.

NOTE: Patron records can be blocked to alert staff to request SSN information. When patrons at more than one library are involved, staff will need to coordinate their efforts to obtain SSN information.

The group will review these recommendations at the next meeting to develop the addendum to the DALNET Circulation Standards document requested by the Board.

4. Guidelines for Patron Name Differences

At the request of the University of Detroit, the group began work on developing more detailed guidelines for resolving name differences in the patron file. There was agreement that names should not be automatically updated via tapeload, because that would result in incorrect name changes. The 2/14/90 DALNET Patron Record Recommendations already provide general guidance in this area.

Louise will draft some detailed guidelines for review at the next meeting.

5. Disclaimer Wording on Circ Notices

Jerry Bosler requested the addition of disclaimer wording to the DALNET overdue notices, e.g., **IF YOU RETURNED THESE ITEMS, PLEASE CONTACT CIRC DEPT.**

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Dody will do some sample overdues with this wording for review at the next meeting.

The next meeting is scheduled for September 19, 2:00 - 4:00 p.m., at DPL Main Library, Conat Room.

Notes by

Louise Bugg
July 31, 1990

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