DALNET CIRCULATION STANDARDS TASK FORCE

SUMMARY MINUTES
September 7, 1988

1) Issues to be addressed by the Task Force

Three major areas will be addressed by the Task Force:
patron records, unlinked item records and statistical
reports. First priority will be given to patron record
issues.

Key issues to be considered with patron records are:
A) Standards for patron name
B) Standards for pseudopatron records
C) Rules for the use of patron records
D) Guidelines for the information in the root of each
patron record
E) Tapeload guidelines
F) Duplication of records/subrecords

2) Discussion of patron record issues

A) Patron record names:
1) Personal names
It was agreed that personal names should be
entered in all uppercase letters in the following
format: LAST NAME, FIRST NAME, MIDDLE NAME/INITIAL (op-
tional) Example: SMITH, JOHN A

2) Pseudopatron names
It was agreed that suffixes will be used for each
DALNET institution when pseudopatrons are created.
Pseudopatron names will be entered in all uppercase
letters in the following format: PSEUDOPATRON
NAME (INSTITUTIONAL DALNET SYMBOL-OPTIONAL CHARACTERS)
Example: LOST$_\wedge$(WSU-SHIFFMAN MEDICAL LIBRARY)

There was discussion about the use of the pseudo-
patron ILL for interlibrary loan purposes because
of billing problems. Bills, fines notices etc.
would not be issued in the name of the borrowing
institution if the pseudopatron ILL is used. If
separate library cards are created for each borrowing
library, there will have to be guidelines for the
creation of these institutional records. A decision
will have to be made on the authority sources for
the names and addresses of institutional borrowers.
At the next Task Force meeting, sources currently
used in ILL operations will be identified and discussed.
The feasibility of AACRII was discussed. It was
pointed out that the people creating patron records
may not be professionals who are trained to interpret
cataloging rules.

B)   Social Security Number

The social security number field is an optional field.
It was recommended that: 1) For keyed records, social
security number is optional; 2) for tapeloaded records,
it is highly desirable that social security numbers
be included. In the future no updating on tapeloads
will be done if no social security number appears in the
patron record; 3) For pseudopatrons, no social security
number will be used.

3) Work for next meeting

A)   Louise Bugg will test overtyping of the root of the
     patron record.

B)   Louise Bugg will check on themaximum number of subrecords
     allowed for each patron record.

C)   Task Force members will bring lists of sources used to
     determine official names and addresses for corporate borrowers.

D)   Task Force members will bring lists of pseudopatrons
     that will be used by their institutions.

4) Next meeting

The next Task Force meeting will be held on Wednesday,
September 21, 1988 at Detroit Public Library in Helen Ma's
office at 2:00.