

DALNET Circulation Standards Task Force Meeting

November 7, 1990

Minutes

Present: G. Bosler, L. Bugg, E. Condic, H. Ma, J. Pearson

Absent with notice: F. Young

1. SAS Reports Update

Jeff reported that the list of borrowers delinquent on paying their bills will be run regularly for WSUL beginning late November. Follow-up bills will also be printed.

Louise will have Dody Fox test run the delinquent list for Macomb and Oakland.

2. Infopass Policy/Procedure (Attached)

Jeff distributed a draft Infopass policy/procedure for discussion. Areas that can vary by library include the patron category, and assigning/handling the barcodes/patron ID's. The group will review the document for the next meeting.

3. Social Security Number (SSN) Policies

The draft recommendations distributed with the previous minutes were discussed. When patrons request deletion of their SSN, it should only be done if they only have a library card at the library where they are making the request. A coded note should be added to alert staff to the action taken.

Gerry will research if libraries can require a SSN. This policy will be finalized at the next meeting.

4. Guidelines for Resolving Patron Name Differences

Helen submitted comments from the Public Library on the need for name elements like Jr. and II to distinguish generations of borrowers living at the same address. Wording in the guidelines was revised and a new draft is attached to these minutes.

5. Note Field Standards

a. Sharing Codes

Jeff will develop a core list of coded patron notes from lists the Task Force members will send him.

b. Standards Enforcement

There are still notes appearing that are not in the standardized coded format. Circulation supervisors need to remind their staff to use coded notes only.

6. Circulation Forum Session

The Task Force began plans for a circulation forum session open to circulation staff from DALNET libraries. It will be held in January or February. Possible sites include Detroit Public, Macomb Community College, and Oakland University. The purpose of the half-day session will be to educate DALNET staff about the circulation standards in effect. There will also be time to have presentations on various aspects of circulation implementation and to have general questions/discussion period for information exchange. Plans will be firmed up at the next meeting.

7. Other

- a. Jeff will distribute copies of WSUL's one-time library card waiver policy at the next meeting. This policy provides a way to allow charges without a library card in hand for one time only.
- b. Jeff responded to a question that WSUL issues library cards as soon as a student's patron record is tape-loaded, which can be at point of pre-registration.
- c. New USPS Address Format

Louise told the group that Bill Kane was researching the new address format promulgated by the U.S. Postal Service for their OCR sorting equipment. We will probably need to review/revise the patron record standards document to conform to these new requirements.

Agenda items for the next meeting include:

- Overdue notice wording change;
- Hold/recall notice wording;
- SAS Report #2: Cumulative Statistics--Specifications Development.

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The next meeting is scheduled for **Wednesday, December 12 at 2:00 p.m. at Oakland University Library.**

Notes by Louise Bugg
November 15, 1990

Attachments: 1. Infopass Policy/Procedure
2. DALNET Guidelines for Resolving Patron Name Differences

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