

**NEOS Access Services Committee Meeting  
Cameron Library  
Oct 2, 2017  
Minutes**

**In Attendance:** Deanna Walker (Olds) Bonita Bjornson (Kings), Peggy Morgan (UofA ITS), Anne Carr-Wiggin (NEOS), Roger Salus (Covenant Health), Marg Sheppard (NorQuest), Laura Lemmens (AB Gov't Library), Lana Thompson (MacEwan), Karen Hildebrandt (Concordia) Roberto Pellegrino (AITF) Natalya Brettle (UofA)

**Teleconference:** Kathy Williams (Lakeland) Sarah Schmidt (Keyano), Brenda Zimmerman (GPRC), Barbara Mahoney (RDC), Wilmer Tenerife (Burman), Shiloe Thomas (Northern Lakes). Donna Gordon, Melanie Belliveau (AHS)

**1. Call to Order/Welcome/Additions to Agenda: 10:06 AM**

This will be Donna Gordon's last meeting. Melanie Belliveau will be the new Access Services member from AHS.

**2. Approval to Draft Previous Meeting Minutes: *Approved by consensus***

**3. TAL Stickers for Registered TAL Patron's cards – Brenda/Anne**

Grande Prairie Regional College has been adding NEOS / TAL stickers to Grande Prairie Public Library cards and registers them on Workflows as TAL borrowers. In doing so, patrons can borrow items with their public library card instead of the paper TAL card. GPRC has been changing the membership profile name for those borrowers from NEOS-TAL to NEOS-EXTRN, to reflect the agreed up on changes this past year. Agreement that it was fine to continue the practice of adding stickers to public library cards and GRPC will share the sticker template for those interested in adapting it.

This past year several NEOS libraries have begun to register borrowers from other libraries as NEOS External NEOS-EXTERNAL clients with their home library card and barcode. See below for more information on how this works. It was noted that libraries decided to use the NEOS-EXTRN profile for this because clients need a separate TAL Card to borrow beyond NEOS, and the EXTRN profile gives access to the NEOS libraries that are not TAL members. There is also potential concern about making the TAL Card brand less visible.

**4. Four week loans for secondary users – Anne/Karen**

This question came up during training for Northern Lakes College. Northern Lakes College sends library items to their users through NLC's many small centres – 20+ locations. Courier service between centres is often on a weekly basis. Given the logistics of sending items to their distance users, the two week loan period for secondary users is not long enough. The question was asked – should we consider changing loans for secondary users from two weeks to four weeks.

General discussion about changing loan period for secondary users with some libraries supporting the change. MacEwan University stated they were not in favour of changing loan periods for all secondary users but would consider extending loans for distance borrowers. Many libraries said they were already extending loans for their distant borrowers. GRPC stated they were willing to extend distance user loans to 4 weeks, but not for all secondary users.

The Policy on Sharing Materials does allow for longer loan periods for distance clients:

2.1.3 *For Distance Clients the home library may override the loan period from two weeks (14 days) to three weeks (21 days) without seeking permission from the lending library*

Peggy noted items would not be recallable if the due date was changed with the special due date wizard. Renewals would remain at 2 weeks.

**Recommendation for a change in policy** – goes to the Director’s meeting:

2.1.3 *For Distance Clients the home library may override the loan period from two weeks (14 days) to **four weeks (28 days)** without seeking permission from the lending library*

**Approved by consensus**

## **5. Lost books paid online & reimbursement – Anne**

At the Spring Directors' meeting, there was mention of our practice of reimbursing libraries when clients pay for lost books and make payments to libraries other than the library that owns the books. This happens in two ways. Clients pay online to libraries that take online payments or they pay directly to their institutions, for example to the registrar's office or finance office, and not via the library. With the first group, each year Peggy Morgan identifies the clients and transactions and Anne emails the libraries and asks them to invoice the library that has received the payment. In the second case, the transactions aren't identified.

There was discussion at the Directors meeting and some Directors felt that it wasn't worthwhile to have this process and that we might consider having the libraries keep the payments rather than having the owning library be reimbursed. Directors decided to ask the Access Services Committee to consider it.

Peggy said reporting should get easier with BLUEcloud Analytics (BCA). If she is able to create the report in BCA, libraries could check their own information.

Keyano, King’s and MacEwan would like to continue the practice of being reimbursed for their lost books. Concordia is fine either way. The practice of reimbursing libraries when clients pay for lost books at another library will continue.

### **Additional comments re: Fines reimbursement**

Fines stay with the NEOS member library where they are paid. A discussion arose about the practice of reimbursing students for fines. In one instance, a student paid a large fine at UofA. The large fine was a result of overdue items from 4 libraries. The student then asked for refund of the Kings portion of the overdue fine from Kings. It would cost more money to process the request, than the actual amount of the fine. Agreement that fines should normally not be reimbursed to the borrower, especially when it is a legitimate overdue fine. Important to ensure front line staff are giving the right message regarding fines. It was noted that the Fines Appeal process is a way of considering issues with people’s accounts in light of policy, practice and the particular circumstances of each appeal.

## **6. Removing aged fines automatically - Peggy**

UofA forgives all aged fines older than 7 years through an automated process. Then they can remove expired user records that could not be removed due to the outstanding fines. At the May NEOS

Directors' meeting, the same automated process was offered to all NEOS libraries. Many NEOS libraries have already responded to the offer.

MacEwan had questions about the process and Peggy shared the information as it may be helpful for all libraries interested in this process.

- They can exclude some bill reasons, e.g. keep lost bills charges
- Forgiving fines through the scripting process produces the same result as manually paying/or forgiving/cancelling fines. User records are only removed from Symphony at year's end, so the affected student records will remain in Symphony for several months after the fines have been removed. Therefore the ties between student registration system and Symphony should continue to work as normal.
- The timing of the bill removal period can coordinate with libraries' yearend.

If any library has not already done so, please let Peggy know if you are interested.

## **7. Reducing named stations - Peggy**

Named workstations can be selected in the configuration window when logging into Symphony. These used to be needed to link bill payments with the payment library but are no longer necessary. Payment libraries are now linked to bill payments automatically in the Report of Cash Receipts daily reports.

Peggy will leave 2 named workstations for each NEOS location and remove the rest of the named workstations. Choose PCGUI-DISP as the workstation in the config screen seen when first logging into Workflows.

## **8. Discard process with dedicated DISCARD user accounts - Peggy**

Currently many libraries mark items for DISCARD by using the Modify Title or Edit Item wizards to change the home location of the item (which also changes the current location). These items are then removed from the catalogue by the monthly remove discard report.

Drawbacks:

- it's time consuming to manually edit the home location of items to DISCARD
- the remove discard report selects on current location. If the current location of an item has been modified (e.g. if a DISCARD book has been checked out), it will not be selected.
- collecting historical stats for discarded items is difficult.

It's possible to modify the discard process to make it more in line with the process of marking items missing. That is:

- create one (or more) users per library with the delivered user profile of DISCARD. Items checked out to this profile are shadowed in the online catalogue. The DISCARD user is non-billable and can be configured in the circ map so that an UNLIMITED loan period applies to checkouts.
- use the Checkout wizard to check out the item to the DISCARD user, thereby changing the current (but not the home location) of the items to DISCARD.

- generate checkout statistics for this profile (e.g. by time period, by item library) via All Checkouts Measures (Historical) or All Checkout Measures (Current) in Director's Station. The ability to run reports for items marked DISCARD will also be available in BLUEcloud Analytics.
- on a regular basis, run:
  - the Convert DISCARD Items report to discharge the items from the DISCARD user and change the current location to DISCARD and,
  - the Remove DISCARD Items report to remove these items from the catalogue.

A question was raised – what to do if an item is accidentally checked out to the user DISCARD. Discharging or checking the item in will correct the error. Many libraries' Tech Services staff use Global Item Modification to set items to DISCARD.

This is an alternate way to discard items and could be a great option for circulation staff. For libraries who want to use it, please let Peggy know.

## **9. NEOS Flags - Lana**

NEOS Transit flags are used by libraries that don't print transit slips from a receipt printer. With MacEwan down to 2 locations, a separate MacEwan Transit Flag is no longer necessary. Recommend combining MacEwan locations with the Academic Transit Flag. Also recommend combining Health and Government to one flag. Everyone agreed with making these changes. Roberto will make the revisions.

## **10. Confirmation of New Chair – Anne**

Bonita is stepping down as Chair and we thank her for her service! Lana from MacEwan was acclaimed as Chair.

Karen is stepping down as Minute taker and we thank her for her service!! Recording of the minutes will be done on a rotating basis between members present at the minute.

## **11. Next meeting – Tuesday February 6, 2018 at 10:00 am**

# Procedures for using Home Library Cards/Barcodes with a NEOS External Profile

## ***Background***

These procedures reflect recommendations and policy changes agreed upon by the NEOS Access Services Committee and NEOS Directors in 2016, and may be adapted for use in libraries that wish to use clients' home library cards as External Cards. All staff, even if their library is not going to be registering clients using their home cards/barcodes, should be aware of this policy and practice, as clients may come to any NEOS library with their home library cards that have a NEOS External profile.

The NEOS Access Services Committee formed a subcommittee to investigate the use of home library cards/barcodes for External Clients. This would allow staff to use a client's home library barcode to set up an External Client profile in WorkFlows which would enable the client to use the card within NEOS without having to have a separate card. This practice was tested at Red Deer College and Concordia University with no significant issues.

## ***Procedures***

- NEOS Libraries **may** use a client's home library card and barcode with a **NEOS External Profile**. (Please note: NEOS libraries decided that clients using their home library cards be given a NEOS-EXTRN profile rather than a NEOS-TAL profile. This is because:
  - If people want to borrow beyond NEOS they will need a separate TAL Card.
  - An External profile would give clients access to NEOS libraries that are not TAL members.
- Home barcodes from any library may be used. If when signing up a client there is no barcode conflict, then staff can proceed.
- Have the client show identification.
- Check WorkFlows for the client's name.
- Use normal procedures to set up an External Card at your library, using the client's home library barcode as the User ID and the NEOS-EXTRN Profile.
- Explain to the client that they have now been given a NEOS External Client profile and they can use their home library card at any NEOS library to check out items in accordance with that library's borrowing policy for External Clients.

## ***Some considerations:***

- There is potential for confusion, both for clients and staff, when the physical card is a home library card but has an External profile within NEOS.
- All barcodes may not work in all NEOS library scanners and self-check machines.
- If there is a new NEOS member in the future with barcodes that conflict with existing External client barcodes, the client will no longer be able to use the conflicting barcode.
- It will be very important to have the client show identification and to check WorkFlows to avoid duplicate accounts.

## **NEOS Policy on Sharing Materials November 2016**

### **External Clients**

2.3.1 External Clients are eligible to borrow from the NEOS Member Library in which they are registered. NEOS Member Libraries have agreed to grant borrowing privileges to registered External Clients of other NEOS libraries. External Clients have the same borrowing privileges in the Integrated Library System as Secondary Clients, except that they have a borrowing limit of 30 items. Other services to External Clients are at the discretion of each NEOS library.

2.3.2 The criteria used by any NEOS Member Library to screen and register External Clients are those guidelines currently in use in that library.

2.3.3 There is one profile across NEOS for External Clients, and a client setting up a profile at one NEOS library is able to borrow and place holds at any NEOS library. Libraries may use the client's home library card and barcode to register the client as an External Client, as long as there is no conflict with the barcode number.

2.3.4 The expiry date for External client privileges should normally be no later than one year from the registration date. In the case of cards where the holder has a special relationship with the library (e.g. alumni, Emeriti or retired staff, or board members) the expiry date can be up to 5 years from the registration date.

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