

NEOS Access Services Committee Meeting

August 10, 2021

Via Video Call

Minutes

Attending: Samantha Nugent (NorQuest College) (Chair), Melanie Belliveau (Alberta Health Services), Wilmer Tenerife (Burman University), Debbie Quast (Concordia University of Edmonton), , Amanda Wills (Grande Prairie Regional College), Bonita Bjornson (King's University), , Kathy Williams (Lakeland College), Trish Hurlbert (MacEwan University), Kaitlin Kirk (Northern Lakes College), Barbara Mahoney (Red Deer College), Natalya Brettle (University of Alberta), Karina Dunn (Vanguard College), Scott Davies (University of Alberta ITS), Elaine Coupland (University of Alberta ITS), Anne Carr-Wiggin (NEOS)

Regrets: Roberto Pellegrino (Alberta Innovates), Tara Sommerfeld-Gladue (Covenant Health), Kathleen Brennan (Keyano College), Jim Derksen (Newman Theological College), Jon Newman (Olds College)

1. Approval of Agenda - Approved
2. Approval of [Minutes from May 11, 2021 meeting](#) - Approved
3. Frequency and method of meetings - how often? Totally via Zoom or a hybrid in-person/Zoom?
 - a. Remain with Zoom at this point.
 - b. Frequency - required to meet twice per year. Early-mid October good to allow for items to go to Directors Meeting in late November.Decision: Meeting will be scheduled virtually every two months. (It will be cancelled if not needed.) The next meeting is scheduled for October 5, 2021, 10:00 am.
4. Reconsideration of earlier discussion about increasing secondary client loan periods [Results of original survey](#) (There may be some changes in opinion since then.)

History and Discussion:

- Issues: Loan period for primaries may be shorter than secondary client.
- Recall and overdue fines.
- Would need to agree on a shared/common recall fine.
- Can we postpone? Staff are just returning and preparing for term?
- Recommendation will need to go to Directors for approval.
- This initiative excludes externals.
- Users are blocked when they have an overdue recall.

Decision: Anne will circulate a summary of the issues and considerations for members to take to their colleagues. The topic will be on the agenda for the next meeting.

5. Days for available holds to expire
 - a. Scott summarized history and current status:
 - i. Pre-pandemic it was 5 business days NEOS-wide
 - ii. For the last year, it's been 10 calendar days, so items aren't tied up too long if a library has limited hours, and to keep hold expiry predictable
 - iii. As libraries have been reopening more fully, they are switching back to 5 days

- b. Question: Does the committee want to set a target date for everyone to be back to 5 days?

Decision: Scott will configure the setting to 5 business days on September 3, 2021, there may be one or two exceptions as reopening plans are not uniform.

6. Recalls

- a. When do we turn them on?

Decision: Yes, Scott will turn notices on September 13th. Items will be due September 20th.

7. Bills notices

- a. Scott summarized history and current status:
 - i. Since March (except May), we have been sending monthly notices of lost bills from last 24 months (rolling)
 - ii. This is a critical part of the lost item lifecycle (otherwise users don't hear from the library after their first assumed lost notice at 32 days overdue)
- b. Questions: Does the committee want to add other kinds of bills back into these notices? (overdue, damage, reserve/recall overdue, etc.)

Does the committee want to continue with the rolling 24 months approach? Go back to sending bills for all dates every month? Have a separate, less-frequent notice cycle for older bills?

- 1. Targeting two years' worth of bills was [discussed favourably on the listserv](#) pre-pandemic, with a suggestion that older bills be sent every 6 months instead

Decision: Yes, add regular bill types into the notices. Previous discussion regarding time periods for bill notices was favorable. Monthly is a 24 month rolling cycle. Older notices every 6 months.

8. Secondary and external client borrowing

- a. Scott provided history and current status:
 - i. NEOS-EXTRN and NEOS-TAL clients currently remain blocked from placing their own holds
 - ii. Concordia, GPRC, Lakeland, Northern Lakes, Red Deer, and Vanguard can currently accommodate secondary/external hold pickup
 - iii. Burman, Keyano, King's, Lakeland, MacEwan, Newman, Red Deer, and Vanguard can currently accommodate NEOS-PS hold pickup
 - iv. NorQuest, U of A, and King's will accommodate secondary/external hold pickup as of Aug. 16
 - v. Our system cannot let us have one set of pickup libraries for NEOS-PS and another set for NEOS-EXTRN and NEOS-TAL - this is why holds have not yet been enabled for all externals
 - 1. What/when is the tipping point for enabling holds for all externals, knowing we may lose some NEOS-PS pickup points that cannot

accommodate them (e.g. MacEwan won't be able to until September sometime)?

- a. Decision: Enable borrowing for NEOS-EXTRN/TAL now - Scott will do this today and it will take effect tomorrow with 6 available pickup locations. This will increase as institutions open.
 - vi. Side discussion: when to stop using NEOS-PS
 1. Can we let the current NEOS-PS accounts expire and not create any new users with this profile. New users will be registered as NEOS-Externals OR Change them all to NEOS-EXTRN and deal with any pickup location issues individually. Institutions can decide how to deal with them noting that the available pickup locations will change.
 2. Scott will send a user list of NEOS-PS
9. Review of library notice text (Working group: Samantha, Trish, Scott, Anne, Deb, Natalya, Melanie)
- a. Setting up a working group to review the text of the shared notices. Scott will follow up with the above group.
10. Notice text change.
- a. NOTICE change - Adding the "DO NOT REPLY" text to the top of notices. This is due to the no-reply change for notices sent and the discontinuation of libnot.
11. Payment locations for secondary and external patrons.
- a. Discussion and Questions:
 - b. Which libraries can act as a payment location?
 - i. UAL - Student connect kiosks can accept payments. Patrons can call the University of Alberta Library Finance department and pay with a credit card.
 - ii. King's - has increased their capacity to accept NEOS overdue fines. The threshold for payments is \$149.00 to prevent Lost Items fines.
 - iii. NorQuest - Anyone with a NEOS barcode can pay by e-Transfer to the Office of the Registrar.
 - c. What is the process when fines are paid outside the patron's home library?
 - i. Overdue fees stay with the library where they are paid. Lost fines are done at the home library and/or reconciled by tracking using a BCA report and invoicing library where fines were paid.
 - d. Reminder to please add your library's payment information to the NEOS website and/or the NEOS Status Dashboard.
12. Blacklight catalogue update.
- NEOS has established a Discovery committee. The end date for NEOS Blacklight is greater than 1 year. Currently the two most used Discovery products are EDS and Worldcat Local.
13. NEOS Dashboard ([Dashboard](#))
- a. Reminder to remember to keep your library information current.
 - b. Feedback - This is a great tool and is proving very useful. Working great, please update as your environment changes.

- c. Suggestion to include information about your library's quarantine period to the dashboard.

14. Date of next meeting

Tuesday, October 5th 10:00 am.