

Minutes MAAC
April 23, 2002

Present: Ellen Eliceiri, Bridges; Loretta Ponzer, Archway Alternate; Carol Warrington, Archway; Sharon Upchurch, Lance; June DeWeese, Merlin Observer; Mary Jo Barbush-Weiss, Merlin; Robin Kespohl, MCO; Mark Wahrenbrock, MCO; Joni Blake, Arthur; Gordon Johnston, Galahad; Jim Mulder, Towers; Linda Medaris, Quest; Elise Fisher, Wilo; Scott Britton, Wash U.

Reports from Clusters:

Towers is the new name for the Northwest Cluster. Towers will sign off on its test pac this week.

Merlin is going to begin using a privacy notice on their opacs similar to the one used by Michigan State. The notice states:

Protect your privacy!

To prevent others (who use this PC after you) from seeing your personal library information, please return to this web page after viewing your record and click "New Search".

The use of a privacy notice is a cluster decision. Representatives are to take this suggestion back to their clusters.

Loan Balancing Table:

Bridges has been upgraded on the loan-balancing table to be equal with others on InnReach for 6 months or more.

Recall Testing:

Arthur, Bridges, Wash U and Merlin have been conducting tests to see if the Recall Function works. If the recall function works properly, loan period for MOBIUS loans and number renewals may be increased. Recalls should be used primarily for reserve material and can only be placed by staff. If a recall has been placed on a book already checked out, the patron will not be able to renew a book and will receive a recall notice. If the borrower has not checked out the book before the recall is placed, a notice will not be generated but the staff will be alerted at checkout by a message.

Mary Jo reported that in the initial test some confusion arose when the recall dates were changed manually. The result was that the due date in the borrowing Innopac was different from the due date in the lending Innopac for the same item. During the second test the minimum use date was changed from 21 to 10 days and the result was the same due date in both Innopacs. Assuming that the minimum use must be shorter than the regular checkout to produce the desired results, the minimum use date was changed from 21 to 20 in the MOBIUS Patron Circ loan rule. This will be discussed again in 6 months.

Black bags:

. Robin reported that there should be 69 bags per site. INCOLSA system only has 29 per site. A plan was presented by Mary Jo to inventory the black bags. May 22nd was designated Black Bag Inventory Day. The following items should be reported to MCO Help Desk on May 23rd:

1. Empty Bags on Shelf
2. Bags going out that day
3. Bags coming in with the courier delivery

The count should be made at delivery time.

Addressing Book Bands:

Gordon Johnston wanted clarification as to what due date goes on the book bands. Some libraries are sending books with a due date on the book. The due date should be recorded on the book when the patron checks out the material.

Scott Britton reminded everyone that when sending books back to the libraries that the borrowing library's name should be crossed off and the lending library's name should be circled. This alleviates confusion as to what's coming in and going out.

Resolving Grievances:

Mary Jo reported that there is a current dispute involving lost book reimbursement between two MOBIUS libraries. Mary Jo felt that if this situation escalates there should be some sort of process in place to mediate grievances. MAAC's charge does not include mediating disputes between libraries. The bylaws of MOBIUS do not include any provision for a grievance process. George Rickerson suggested that we send a recommendation for a grievance resolution process, along with some context for the request, to the Executive Committee. The following recommendation will be sent to the Executive Committee:

MAAC requests a MOBIUS process to resolve issues, problems, misunderstandings, grievances, and etc. between MOBIUS libraries that cannot be resolved by the libraries themselves. We suggest an ad hoc committee comprised of member representatives not party to the dispute.

Mary Jo said that there is also a potential problem with some Wash U patrons. Wash U Medical Sciences Library is not a part of MOBIUS but the patrons of the medical school are part of Wash U's general patron database and can borrow via MOBIUS. The problem is that other MOBIUS library patrons cannot borrow from the Wash U Medical Science Library via MOBIUS because their holdings are not in the MOBIUS Union Catalog. Scott acknowledged that this is the case with the medical school patrons but pointed out that the Medical Sciences library will lend via Interlibrary Loan and the number of books

in question is very small. He suggested that if it is an issue that a possible solution would be to change the medical school patron type. It was decided that this should be taken back to the clusters to see if this is indeed an issue among MOBIUS members.

Vote on Enhancements:

MAAC voted on circulation enhancements for Robin to take to the IUG meeting this month. The method of voting was 1= very important; 2= important; 3=not as important. The following "1" votes were tallied:

40 (Billed item: status code); 20 (Broken & incomplete trans'ns: auto report, repair); 53 (Cancel & transfer request to diff.branch); 7 (Check in at Owning site: In transit code); 15 (Check in at Owning Site: In Transit screen message); 28 (Loan status, Owning site: display full loan info); 32 (Over due notice: print library name); 42 (Patron record, permit merging); 21 (Reports: In Transit too long); 22 (Reports: Returned too long); 34 (Reports: Returned too long); 33 (Reports: Holds management report); 50 (Requesting: Pick up location flexibility)

The following "2" votes were tallied:

55 (Cancel request: increase text field); 31 (Canceled request: transfer to another system); 54 (Checkin at Owning site: remove links, do fines); 3 (Checkin: system msg for item with IR hold); 13 (Checkout at Owning site: accompanying items); 25 (Mgmt Info: Statistics report by library); 24 (Mgmt info: Statistics report for shared system); 35 (Mgmt Info: Statistics unwanted items); 1 (Pickup notices: remove items already checked out); 8 (Renewal: retain original due date); 16 (Reports add sort by patron name); 23 (Reports Received too long); 30 (Requesting; request balancing within an institution); 12 (Requesting: system messages when request denied).

The following "3" votes were tallied:

41 (Barcode editing); 51 (Canceled request: Convert to ILL request); 11 (Checkin: retain last patron info); 48 (Checkin Borrowing site: print labels); 9 (Checkout: change system message cleared); 38 (Checkout: support checkout and delivery to home); 36 (Fines: remove od fines for claims ret'd); 39 (Management Info- Turnaround time stats); 17 (Mgmt Info: Statistics Item # of checkouts); 49 (Paging slips: print loan period); 37 (Request balancing by individual library); 6 (Requesting announcement message); 4 (Requesting: display home library first); 29 (Requesting: patron verify, max # of items on 2 systems).

Proposed MOBIUS Patron Initiated Circulation Policies:

Mary Jo presented a policy for consideration. This policy was based on the OhioLink circulation policy. The suggested policy is as follows (MAAC suggested changes in bold):

1. Types of materials available for loan- monographs only are available through **MOBIUS patron initiated borrowing**.
2. Loan length- 21 days for all patron types.

3. Renewals—One renewal of 21 days is allowed. Items with additional holds may not be renewed.
4. Recalls- Materials may only be recalled by the owning library, and may be recalled from any patron type. Minimum use: **20** days.
5. Reserve- Materials borrowed through MOBIUS may not be placed on reserve at the borrowing institution.
6. ILL-Patrons should be strongly encouraged to use MOBIUS **patron initiated borrowing** instead of ILL.
7. Patron records-Complete Patron records are available only in the home cluster of the patron. Only authorized staff at the patron's home library may change, update or enter patron records for their borrowers. Only staff at the home library may override blocks for their patrons.
8. Loan balancing-An attempt will be made to balance lending and borrowing over the course of time at each institution, ~~unless that institution chooses to be a net lender~~. The patron will not be able to designate which copy is to be borrowed unless the title has one or more volumes attached to it.
9. Materials available locally-If a title is requested through MOBIUS and it is available locally, the system will choose **the** local item. (Enhancement- will reject the request and refer the patron to the local campus) Note: Robin will check on this enhancement and report at a later date.
10. Availability of materials-Coding in local records should accurately reflect whether or not the item is requestable.
11. MOBIUS loan rules- MOBIUS loan rules should not be overridden to permit longer loans than originally allowed, either by extending loan periods or checking in and checking out again.
12. New Materials- New materials will be automatically available for any MOBIUS borrower as soon as it is available to local patrons for circulation. If the material is ordered for a specific patron a hold should be placed by or for that patron on that order. NOTE: This should be taken back to the clusters for discussion.
13. Charges- A lost book replacement charge of \$120 will be billed to patrons who do not return MOBIUS items 45 days after the due date. This includes a \$100 lost book fee and \$20 nonrefundable billing fee. The patron's home library may keep the monies collected for the billing fee only when the books are returned, the owning library will get all monies collected for replacement costs of lost books.

New Appointments:

The following clusters should appoint new representatives for the next two-year term: Arthur, Merlin, Towers, Galahad, and Wilo. The new representatives' names, email, and phone number should be sent to Robin Kespohl.

Next meeting: July 23, 2002

Respectfully Submitted, Elise Fisher

