Minutes of Evergreen Advisory Committee Meeting
Via Zoom
Wednesday, December 1, 2021 at 2:30 PM

Committee Members Present: Debby Emerson (Wadsworth/Livingston), Lisa Gricius (Warsaw/Wyoming), Kelsy Hibbard-Baker (Geneva/Ontario), Kimberly Iraci (Williamson/Wayne), Margo Prak (Bloomfield/Ontario), Erin Robinson (Arcade/Wyoming)
Others Present: Dan Guarracino (Automation Librarian, PLS), Ron Kirsop (Executive Director, PLS), Kathryn Riedener (Cataloging, PLS)

1. Call to order
The meeting began at 2:32 PM.

2. OWWL Policy Review
The committee reviewed OWWL policies regarding patrons. The policies can be found here. The actual policies are in italics, while normal text is the committee's discussion and recommendations.

   A. **In-system vs. Out-of-system patrons**
   The PLS service area is defined as being formed by the counties of Wyoming, Livingston, Ontario, and Wayne in the state of New York.

   In-system patrons are all people living within the four county area. This includes residents of "unserved" communities, or, those communities within the geographic boundary of PLS, but outside of a PLS member library's chartered to serve area.

   Out-of-system patrons are people living outside of the four county area. (OWWLAC, 5/22/2018)

   The committee recommends that PLSDAC vote to define in-system patrons as anyone who owns property or who pays taxes to support PLS libraries, subject to PLS's Free Direct Access Plan. PLSDAC should also consider whether temporary residents, such as college students, qualify as in-system even if their permanent address is outside the OWWL service area.

   There is no difference in Evergreen permissions or OWWL2Go permissions for in-system and out-of-system patrons.

   B. **Out-of-system Patron Statistical Categories**
   The Residency and School Code statistical categories include areas that are outside of, but border the four PLS counties and/or share school districts with PLS communities. For these areas and school districts, select the appropriate codes. For all patrons who live in

non-contiguous areas, use the "OOS" code from the Residency and School District lists. (OWWLAC, 5/22/2012, 2/2014, 5/2018)

Some committee members at libraries near county borders admitted that they don't always do this, and will select OOS instead of searching for the school district in the dropdown menu.

The committee recommends adding rationale at the end of this policy such as: "This information is useful in determining the use of library resources by neighboring communities." This may help member library staff understand the importance of collecting accurate statistics from OOS patrons.

C. Online Library Card Registration Policy
The Online Library Card Registration Policy - Adopted affirms that online library card registration is available to all full and part-time residents of Ontario, Wayne, Wyoming, and Livingston Counties as well as any person who attends school or pays property taxes in these counties. Out-of-system self-registration forms will not be processed. (EAC 10/5/2020, PLSDAC 11/13/2020)

The committee did not have any recommended changes. Member libraries should continue to monitor their pending patrons and contact OOS requests to let them know they cannot obtain an online card.

D. Standard registration form
OWWLAC recommends using the standard registration form. The basic form can be modified with local library customizations as needed. (OWWLAC, 2/22/2006, 1/2014, 05/2018)

This form has been revised as of 07/2019 and can be downloaded from: Patrons Registration Form Printable.

The committee felt that the wording of this policy might make new employees think the form is required to use, even if it doesn't fit with their library workflow. As such, the committee recommends changing this policy completely to the following:

> A standard patron registration form is available to download here. Member libraries may use the form and customize it as necessary.

The committee also recommends removing the second sentence in this policy. The revision date is available on the actual form itself, and in parentheses in the file name itself on OWWL Docs.

E. Registration paperwork retention
OWWLAC recommends keeping registration paperwork for no longer than is reasonable for local workflow (i.e. time it takes to enter all data into the system).

If local library policy indicates retaining paper forms for any length of time, they should be stored securely. Scanning and saving documents electronically is one method used by libraries for secure, long term storage. (OWWLAC, 3/2005, 4/2005, 2/2014, 10/2014, 05/2018)

The committee's official recommendation is to keep registration paperwork for no longer than is reasonable for local workflow, so "OWWLAC" should be replaced with "EAC."

The committee recommends changing the second paragraph of this policy as follows:

> If local library records retention policy indicates retaining paper forms for any length of time, they should be stored securely. Scanning and saving documents electronically is one method used by libraries for secure, long term storage. If libraries retain registration forms in any capacity, security of these forms is the responsibility of the library.

The committee also recommends adding language to clarify proper disposal (such as shredding).

Because many libraries are not keeping registration forms, the Evergreen statistical category "Registration on file" may no longer apply. Ron recommended changing this to "Originally Registered at" or "Registered at"; then member library staff can communicate about whether the form is on file or was shredded. Dan and Kathryn will see if they can edit this in the Evergreen configuration.

F. Driver's license in patron account
Driver's licenses are not to be added to patron records in Evergreen. There is no option to add driver's license number in a dedicated field, nor should this data be added in any other area in the patron record. (OWWLAC 10/2014, PLS Policy 1/2015)

Libraries may include driver's license numbers in their paper registration files, security of these files is the responsibility of the library.

The committee had no recommended changes for this policy.

G. Replace registration paperwork
Changing home library, address, library card number, etc. does not necessitate completely new registration paperwork. If new paperwork is completed, the old paperwork should be discarded. If the updating library is not the same as the original card-issuing library, the original library should be alerted so that they can update their files, and the updating library should change the "Registration on file" statistical category entry. (OWWLAC, 2/2014)

The committee recommends changing the title of this section to "Updates to patron accounts".

The committee recommends changing this policy entirely to the following:

> Changing home library, address, library card number, etc. does not necessitate completely new registration.

> If a patron's home library or address has changed, the updating library should change the residency code, school code, home library, and hold pickup library as necessary.

The committee discussed whether patrons should be issued a new library card when their home library changes. Library card prefixes are tied to Owwl2Go statistics, and Owwl2Go cost share is based on digital circulation per library. For example, if a Geneva patron retains their GPL card after making Phelps their home library, their Owwl2Go use will be tied to Geneva's statistics and will impact Geneva's Owwl2Go cost share as a result.

Libraries with Hoopla subscriptions also rely on the home library prefix; a patron with a card from a library that *does not* subscribe to Hoopla will need a new card if their new home library *does* subscribe.

However, some patrons memorize their library card numbers and do not want a new card.

The committee has no recommendations regarding this.

H. Patron has a name change
The patron's Evergreen account is updated with the new name; if the library updating the account is the library holding the original paperwork, the signature can be updated on the original form. (OWWLAC, 2/2014)

The committee recommends changing this policy entirely to the following:

> Changes to a patron's legal name or preferred name can be made based on local library policy.

I. Agency cards
Cards may be issued to specific types of agencies for use by authorized agency staff persons, according to the guidelines laid out in the [Patrons Agency User Records](#) page and agreement.

The committee had no recommended changes except to replace "OWWLAC" with "EAC" on the linked site.

J. Expired accounts marked inactive
Patron accounts that have been Expired for more than 3 years will be marked "Inactive" automatically by the system. The accounts will be flagged with an Alert stating the reason

for being marked inactive, and remain in the database should the patrons return to the library. (OWWLAC, 2/2014)

The committee had no recommended changes.

Dan mentioned that he could build a report for libraries that includes inactive patrons who have reactivated their accounts.

K. Deleting inactive expired accounts
Patron records that have been inactive for 6 years will be deleted, including outstanding bills. (OWWLAC, 9/2014)

The committee discussed the timeline of patron account expiration, inactivity, and deletion. Two years from their last activity, the account is considered *expired*. If the patron does not use the account for an additional three years after that, the account becomes *inactive*. If the patron still does not use the account for another three years, it is *deleted*. The total timeline is about 8 years.

The committee recommends the following change:

> Patron records that have been inactive for 3 years will be deleted, including outstanding bills.

The committee wondered about patrons who either move or pass away and their account is manually marked inactive by library staff. Are these accounts subject to the same timeline for deletion? Dan will look into technical details.

L. Accessing Owwl2Go
Only patrons with current accounts in good standing can access Owwl2Go materials. (OWWLAC, 2/26/2013, 2/2014)

The committee recommends that
- Explain what "good standing" means, i.e. unexpired.
- PLSDAC remove the $5 block because the patron is borrowing digital materials that cannot be lost/stolen.

M. Account expiration
Patron accounts will expire every two years; staff must verify and update contact information before extending another two years. (OWWLAC, 10/2004, 1/2014)

Patrons with email accounts will receive a pre-expiration email notice, alerting them to contact the library to extend their library privileges. (OWWLAC, 1/2014)

The committee recommended moving this section above "Expired accounts marked inactive" so that the policy flow matches the process of patron accounts (first marked expired, then inactive, then deleted).

N. Renew patron account privilege by phone
Patron accounts may be renewed over the phone if staff first request the patron's current address; if this address does not match the address in the patron record, then the staff should request formal identification. (OWWLAC, 1/22/2013; 1/2014)

The committee recommends changing the name of this policy to "Renewing patron accounts" and changing the policy entirely to the following:

Patron accounts may be renewed in person, over the phone, or by email according to local library policy.

Committee members say they like that patrons have to contact the library to renew their account, but some patrons have indicated that they would like an online renewal option.

3. New business
One member library staff requested different colored banners on various Evergreen screens such as Checkout, Checkin, Item Status, etc. There is sometimes confusion where staff think they are scanning an item in Item Status, but accidentally check it in. Although there are visual differences between those screens, different colored banners would be more noticeable. This is not something that PLS can customize on the staff-side, but Dan can report it as a "wishlist" item to the Evergreen developers.

Shared libtech and libcirc accounts at most libraries will be deleted on December 20. PLS created a limited self-checkout Evergreen login for each library to replace the libcirc accounts.

4. Next meeting date/time
Wednesday, February 2 at 2:30 PM. The Zoom link from today's meeting should work as a recurring meeting link, but Dan will email the link to everyone beforehand.

Kelsy will not be able to attend this meeting. Erin agreed to take minutes. Kelsy will send a document with the agenda and minute outline prior to the meeting.

5. Adjourn
The meeting adjourned at 4:07 PM.

Respectfully submitted,
Kelsy Hibbard-Baker