Minutes of Evergreen Advisory Committee Meeting
Via Zoom
Wednesday, April 6, 2022 at 2:30 PM

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

1. Call to Order
The meeting began at 2:33 PM.

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

A. Mark Lost Manually
Any library can mark an item lost, even items not owned by that library. Marking an item lost will create a Lost Materials bill on the patron's account, which will typically block the patron from further circulation. Generally, it is recommended that if there is any doubt whether the item is actually lost, libraries should renew the item (within remaining renewal limits and respecting hold blocks) and allow the item become overdue until lost. (OWWLAC, 4/2014)

The committee suggested making a small grammatical change. ("allow the item TO become overdue until lost.")

B. Mark Item Lost by Patron, item not owned by your library
Any library may manually mark lost any other library's materials. When in doubt, contact the owning library before taking action. (OWWLAC, 4/2014)

No suggested changes.

C. Overdue Until Lost
All items that are overdue more than 8 weeks will be marked as lost, automatically by the Evergreen system. This will create a Lost Materials bill on the patron's account, which will typically block the patron from further circulation. (OWWLAC, 4/2014)

No suggested changes.

D. Items Damaged "Beyond Repair"
If an item is damaged to an extent that it cannot be repaired and remains checked out to the responsible patron, the item should be Marked Damaged and the patron billed for the full replacement price. (OWWLAC, 4/2014)

No suggested changes.

E. Damaged Items Not Owned By Your Library
If a damaged item is not owned by your library, use an CatalogingRecallHold to send the item back to the owning library for evaluation and to marked damaged as necessary. (OWWLAC, 4/2014)

The committee suggested making a small grammatical change ("to **be** marked damaged"). "CatalogingRecallHold" should be changed to "RecallHold."

Many libraries don't use the RecallHold option. They call the owning library and ask what to do with the damaged item. Dan explained that RecallHold is a better option because it ignores all patron holds and fulfills the RecallHold first, sending the item back to the owning library. When the owning library staff check the item in, Evergreen instructs them to route it to cataloging.

Could use more member library staff education on this, as some committee members expressed they were unaware of this option.

F. Payments accepted for lost/damaged items owned by another library
Any library may accept payment for any other libraries' lost or damaged materials, but the payment must be forwarded to the owning library.
- *PayBills should be made using the "Passthru" PaymentType*
- *Checks should be addressed to the owning library*
- *Cash may be sent through delivery*
- *Include bill receipt/documentation with payment*

(OWWLAC, 4/2014)

This was already discussed at a previous meeting.

Needs to be updated to "Work" payment type, not "Passthru"

G. Hold Limits
Patrons may have up to 20 holds. Any suspended holds do not count toward the 20 hold limit. This policy is set in system configuration. (OWWLAC, 3/2014)

Currently, suspended holds **do** count towards the 20 hold limit. This was a COVID change.

The committee suggested allowing 20 active holds and 30 suspended (50 total holds) and will present this to PLSDAC for approval.

H. **Hold not picked up**
All holds not picked up after 7 business days should be removed from the holds shelf, the patron hold cancelled, and the item routed to fill other holds or back to the owning library for reshelving. (OWWLAC, 4/2014)

All libraries should assess a $1.00 "Hold not picked up" bill for hold items not picked up within the 7 business day period. (OWWLAC, 4/2014)

The committee recommended removing the $1.00 "hold not picked up" fee. Instead, member libraries can decide if they want to charge a fee and make it a local policy.

Do holds expire after seven business days or calendar days? Dan said he will check whether Evergreen takes into account the days a library is closed when the hold expiration date is generated.

Do libraries follow the 7 day policy or just make their own judgment calls on when to cancel holds? This does impact system sharing if libraries don't check for expired holds often and items sit on the shelf for a long time. There is an Evergreen report for expired holds.

One suggestion was to change the policy to: "All holds not picked up in a reasonable amount of time not to exceed X days should be removed from the holds shelf."

The committee will continue the discussion via email after Dan compiles some data to see how long holds are sitting on shelves.

I. **Holds and accounts with circulation blocks**
If a patron's account has circulation blocks - fines of $5.00 or more or more than 5 overdue items - they may still place holds, the holds will be captured and sent to the patron's pickup library as normal. However, the patron must resolve the hold blocks before they will be able to check out their hold items. (OWWLAC, 8/2018)

The committee recommended a small grammar change and changing "hold blocks" to "circulation blocks" in the second sentence.

There was a discussion about whether it's possible to do away with the $5 circulation block and instead block patrons who have unresolved lost/damaged items. Then the patron would be penalized because they have lost or damaged materials, not a dollar amount in fines.

There was also a discussion about increasing the $5 block limit just based on inflation.

It was decided to leave the policy as-is for now and come up with more data and questions before addressing it in the future.

J. **Age-Based Hold Protection**
Age-based hold protection limits holds to those requests being picked up at the owning library, for a period of two months based on the copy create date. Use of age-based hold protection is optional, can be applied to all types of new materials, and can be removed from a copy at any time, as determined by the owning library. (OWWLAC, 2/26/2013, 4/2014)

Age-based hold protection is no longer based on copy create date, it's now copy availability date or copy active date.

The committee wondered if it is worth shortening age-based hold protection to one month.

There are currently two existing reports that might prompt some libraries to remove age-based hold protection on certain titles: the *High Demand* report and the ad-hoc report *Age Protected Items With No Local Demand*.

Dan offered to compile some data on age-based hold protection. The policy will stay as-is for now and the committee will revisit after Dan compiles data.

3. New Business

3.1 Permissions for Using Hold Groups
Which staff members should be able to manage Hold Groups? Folks with Circ II (and, it goes without saying, Library Admin) permissions may be the best option.

A hold group is an upcoming Evergreen feature that allows staff to create groups of patrons and then place a hold on a title for all of those patrons at the same time. Useful for book clubs.

The committee agreed that Circ II and Library Admin were reasonable levels for this permission.

3.2 Opt-In Setting for Overdue and Pre-Due Notices
We have the option to create a new "opt-in" setting that would allow patrons to decide whether or not they'd like to receive overdue emails. Our thinking is that this feature should not be enabled, but there may be reasons to implement this that we haven't thought of.

The committee agreed that it would be best for patrons to receive all Evergreen-related emails, rather than opt in/out for certain types.

3.3 Allow Expired Patrons to Renew Items
We also have the option to allow renewals by expired patrons. Our thinking is that this may be useful. One of the most common autorenewal errors is that a patron has expired; this would help prevent those errors.

Many denied autorenewals are because the patron's account has expired. No one was able to think of any negative situations that might arise from allowing expired patrons to renew their items. Recommended sending to PLSDAC for approval.

In the patron sidebar, Evergreen alerts staff if a patron's account will expire in the next three days. The committee recommended increasing this to 30 days (keeping in line with the email the patron receives). PLSDAC will need to approve.

3.4 Quick information items from the Changelog
- Bug tracker added at bottom of page
  - Won't be for all bugs, but ones that affect people's workflows will appear there.
- New item status ("Storage")

3.5 Patrons marked inactive
A member library employee asked, *When patrons are inactive and come in to renew their account, can updating their expiration date automatically mark them active again?*

Dan says probably not. Could add to a wishlist but it's likely another Evergreen user has already suggested this.

4. Next meeting date/time
Wednesday, June 1 at 2:30 PM.

5. Adjourn
The meeting adjourned at 3:55 PM.

Respectfully submitted,
Kelsy Hibbard-Baker