Florida State University
Campus Circulation Committee

Tuesday, August 12, 2014

Meeting Minutes

Meeting began at 10:05 a.m.

Creation and Maintenance of Patron Records

- **Patrick Fulton:** Patron record created improperly in Strozier when entered manually critical information, including EMPL ID. The EMPL ID is the key to all communication between Accounts Receivable and ALEPH for billing. Without that in place, libraries cannot bill. We should discuss processes for creating patron records, e.g., what times we will create patron records, what times we will not, etc. We should also consider cross-training among libraries, as well as generating basic training guides, including training documents and universal guidelines for creating patron records. For example, perhaps temporary patron records should not be created at each library.

- **Fulton to group:** When are we creating records? For example, we saw a temporary record for a patron who is affiliated with the Center for Intensive English Studies (CIES).

- **Mike Siriwardena:** That one is an odd situation. CIES students are affiliated with FSU but not officially with university. A list of CIES students is created at the beginning of the session, and Carol Mayhall makes all temporary records for these students. Some people start later, and they are not on the list; someone in circulation will have to create a temporary record for them to use the library.

- **Rachel Besara:** We have also created temporary records for visiting scholars.

- **Sara Nodine:** Regarding visiting scholars: the patron’s card/record should now just work automatically, and we shouldn’t have to create a patron record for visiting scholars now that shared bib among state universities has been implemented.

- **Siriwardena:** I’m not sure about college students. We may have to create records for TCC students and students from other state colleges if they want to borrow FSU items.

- **Fulton:** What was the verification process for visiting scholars?

- **Siriwardena:** We used to have a website to verify if students are active or TCC students. Now that all the state universities connected in ALEPH, library staff should be able to swipe visiting scholars’ cards to automatically see their patron records in ALEPH.

- **Fulton:** In the past, we should send to visiting scholars to Strozier to create a patron record; do we no longer have to do this?

- **Siriwardena:** No, they should already have a record in ALEPH.

- **Besara:** We used to create temporary records for international students who are new and don’t have SSNs, but we no longer do that.

- **Fulton:** What about incoming students who are not yet matriculated?

- **Siriwardena:** We tell incoming students that they have to wait until they officially start their classes.

- **Fulton:** When do incoming students’ patron records kick in?

- **Jillyann Sanchez:** Usually a week after they start classes.

- **Siriwardena:** Soon after they pay their tuition.

- **Fulton:** I will ask around to get some more information about when the patron records show up in the system and the overall timeline. Do we know who to contact about this issue -- anyone in the Registrar’s Office?

- **Siriwardena:** Dan [Schoonover] would know.
Sanchez: Another instance I have seen temporary records created is when students have lost their FSUIDs. When they get a new FSUID, they are issued a new library (206) number. Sometimes library staff will create a whole new record instead of updating the existing record.

Nodine: I think most of the duplicated records have been deleted after FLVC’s patron purge/clean up.

Fulton: I don’t think we’ve ever had a FAMU student swipe through successfully.

Fulton to group: For international students -- have we ever had any troubles with clearance or verification?

Group: No.

Cross-training Among Campus Libraries

Fulton: Perhaps we should consider cross-training among the campus libraries in which we create universal baseline training materials and instructional guides.

Sanchez: The University Libraries is already planning to implement this among the FSU Libraries in which circulation supervisors go to each campus library to get training within that library. The goal is to try and get everyone on campus to do the same basic processes/procedures. Department heads have asked library staff to go to each library and swap staff to make sure that general policies are aligned across the University Libraries. Another goal is to provide backup for staff shortages. In addition to unifying policies and procedures, cross-training will provide assistance during emergency situations and allow library staff across campus to understand why each library’s procedures exist.

Besara: I think it’s a good idea to establish a baseline training program across the campus library. This would provide unified training materials accessible to all libraries versus training done just by word of mouth.

Fulton: We could attach these kinds of document in LibGuide.

Sanchez: I will send Robyn some of the training documents we are using so she can upload to the LibGuide. Holly Kouns is the FSU Libraries contact for training.

Fulton: We can use these documents for comparison and create materials for ourselves for differentiation. It will be a good way to unify policies.

Nodine: What about staff permissions?

Fulton: Permissions differ among each campus library. Theoretically, if policies are unified, so will permissions.

Nodine: Cross-training will always be with someone from the home library present?

Sanchez: Yes; the only exception will be at the Scholars Commons reference desk since there is only one seat there.

Fulton: This will be great, especially for clarification on global and local patron blocks, as well as how each library handles this.

Sanchez: Cross-training is kicking off for Fall 2014. Leadership has proposed to include other campus libraries (e.g., Music, Goldstein, etc.).

Fulton: This is something that we will have to take back to our directors to see if this is feasible for each campus library.

Siriwardena: Only full-time circulation supervisors are participating in cross-training.

Besara: Currently, only circulation supervisors are being considered for participation, but we want to expand to other staff. This will provide a better understanding of how the libraries work among the staff.

Nodine: Is another purpose for cross-training for understaffed situations?

Siriwardena, Sanchez, Besara: Yes. Cross-training allows other library staff to fill in as backup for understaffed times at other libraries; supervisors from other libraries can fill in as needed.

Besara: We are also considering cross-staffing in which each library has a supervisor liaison from another campus library. This way, that one supervisor liaison would know the other library the best and would be better equipped to serve as backup.

Nodine: This is a good idea so that we have someone to rely on in an emergency situation who can step in and help (e.g., all supervisors away at a conference).

Fulton: We can start by sharing the core documents on our LibGuide.

Proxy Borrowers for Faculty

Robyn Rosasco: What are each campus library's policies and procedures for research assistants/office assistants/support personnel picking up and/or checking out books on behalf of faculty?

Siriwardena: For research assistants and graduate assistants, we ask the faculty member to complete the Faculty Authorization Form that authorizes the student to borrow or pick up the items on the faculty member’s behalf. We then put a note in the faculty member’s patron record in ALEPH. When the GA or RA comes to check out the book, he or she presents his or her FSUID or driver’s license, and the circulation staff member verifies this against the note in the faculty member’s patron record.

Rosasco: What about faculty members who have research support who are not affiliated with FSU? For example, many of our faculty members rely on office personnel to conduct library research for them.

Siriwardena: In those cases, you could ask the faculty member to complete a similar form for the office personnel. Instead of asking for the FSUID, ask for driver’s license number. You can put this information in the patron record.

Besara: We do the same, except we also include an expiration date to indicate when the proxy borrower will no longer need to borrow on behalf of the faculty member.
Sanchez: The Faculty Authorization Form is either in the FSU Libraries intranet or on the website. Robyn, I can send you a copy of the Faculty Authorization Form.

Rosasco: What about ILL requests? Sometimes we get multiple email addresses for one faculty member.

Fulton: You could give a temporary ILLiad login.

Rosasco: We don’t use ILLiad and do most of our ILLs manually, including the verification process (e.g., if requestor currently an active student, staff, or faculty member of FSU College of Medicine).

Amy Lipford: At law, we have mostly research assistants who will request on behalf of faculty, and we allow them to do so. We will not, however, allow faculty support assistants to ask for proprietary database access (e.g., Westlaw). We let them know it would violate the license agreement. We can usually figure out when a research assistant is requesting on behalf of the faculty member when we see the faculty member’s message in the email chain.

Fulton: Do any libraries create ILLiad proxy accounts?

Monica Bafetti: We once did, but we stopped.

Siriwardena: LEDS has cleaned up most faculty proxy requests.

Nodine: Music does allow spouses to borrow on behalf of a faculty member. We also sometimes allow students to borrow on behalf of a faculty member when the faculty is on medical leave, but the faculty was still requesting the book. These cases are usually just the student assistant picking up the item.

Meeting adjourned at 10:44 a.m.

Next meeting will be held at 10:00 – 11:00 a.m. in the College of Medicine.