

Tech Support Minutes

Tuesday July 24th, 2007

9:15 am

Downtown Library, Lee B. Brawner Conference Room

Attendance

Kay Bauman, Janet Brooks, Kathy Dunn, Anne Fischer, Teresa Goggins, Buddy Johnson, Aaron Killough, Karen Marriott, Donna Morris, Kim Terry, Jimmy Welch, and Deb Willis

Update on Action Items

1. Deb Willis reported over her findings from the Library Managers' on the text to include in the FAQ hand-out and simple search screen (Appendix 2).
 - a. Kim Terry will review the FAQ questions and answer them with the assistance of a Tech Use group member and report back at the next committee meeting.
 - b. After review of the simple search screen text, Tech Support Group discussed established a sub-committee to further investigate simplifying the Simple Search Screen. Committee members will include Janet Brooks, Kathy Dunn, Teresa Goggins, Buddy Johnson, and Kim Terry. The committee will meet and discuss their findings at the next Tech Support Group meeting.

New Business

1. Jimmy Welch gave a presentation on the cyberMARS shopping cart & printable bibliographies. Buddy Johnson submitted research from six different libraries that use bibliographies in their systems. CyberMARS' shopping cart and bibliographies update was modeled after the research found from those six different libraries. The update will allow customers to print or email formatted bibliographic information from cyberMARS and can contain 500 materials at one time.
 - a. IT will email Planning to see if training will need to be conducted for this new update and will allow staff to test the updates before going live on September 10th, 2007.

- i. Planning Services announced the updates on cyberMARS on August 7th, 2007 to allow for questions and time for possible debugging.*

Standing Topics

1. Internet— Teresa Goggins asked everyone in the group for feedback and input. The commission page has been updated to include upcoming meetings and she also presented a preview of the **Donate Now** page that will provide information for customers who wish to donate to the Endowment, Friends, or their time to the library system.
 - a. Buddy Johnson suggested adding information for customers who wish to donate photographs or diaries for the Oklahoma Images and Folklore Collection.
 - i. Buddy Johnson will work on a write up to add to the Donate Now page for donating photographs or diaries.
2. Intranet—Teresa Goggins announced the positive feedback she has received from the Paws for Recognition page on the Intranet.

ILS Issues (Appendix 1)

1. Tech Support received an email suggestion from a customer over having a button similar to the Magazine button on cyberMARS for Music CDs.
 - a. Tech Support discussed this item and possible ways of incorporating RSS feeds. More research is needed before making a decision. Deb Willis will conduct research to see what other libraries are doing over RSS feeds announcing new materials or updated lists.
2. Tech Support received a suggestion to change the word PENDING on overdue notices sent to customers to have the TOTAL amount due.
 - a. Information Technology will be working on designing new notices and will address this issue closer to the first of the year.
3. Tech Support received a suggestion to remove lost card records from the V-CIRC database.
 - a. Tech Support stated there are occasions when this information is needed and should keep a record for future reference to notice for commonalities or patterns.
4. Tech Support received a suggestion to add a "staff" category in V-CIRC.

- a. Tech Support announced there already is a "staff" category in cyberMARS that is good for record keeping.
5. Tech Support received a suggestion over how reserves are checked-out. This suggestion also asked for a prompt when mismatched reserves are about to be checked-out.
 - a. Tech Support announced that the new system may even remove these concerns so at this time, Tech Support decided to wait until the new system is in place before making any decision on this tech suggestion.
6. Tech Support received a suggestion to add something on the reserves screen on cyberMARS so customers could enter a range of dates the computer could skip them for the reserved item.
 - a. While this is highly desirable for cyberMARS, Tech Support suggested to place this item on wish list. Tech Support reminds committee members to inform staff of the comment line when customer asks for additional hold time.
7. Tech Support received a suggestion for changing the shelf number designation for Young Adult books in the library catalog.
 - a. Tech Support announced that this suggestion would not work because Young Adult books do not have a classification code, only a location code. Young Adult books are in a location and some libraries may have the same book in different locations.
8. Tech Support received a suggestion over public computers. The suggestion called for a security screen saver for the public PCs and the use could return back to the main screen by entering the library card number. Another suggestion was to have a splash screen with information about the five-minute waiting idle rule and how many pages customers can print for free.
 - a. This suggestion was forwarded to the Computer Use Group for further examination.
9. Tech Support received suggestion to allow mlsBudget to export Expenditures to an excel spreadsheet.
 - a. After discussion, IT announced it would update this function to allow exporting of Expenditures to excel spreadsheet.
 - i. *On August 1st, 2007, IT sent an announcement that stated the mlsBudget application has been enhanced to export the expenditure report to Excel.*

10. Tech Support received a suggestion for programmers to add their own .jpeg or .gif to the event calendar in the event that an illustration cannot be found that is suitable for their desired program.
 - a. Teresa Goggins stated she would send an email to all programmers informing them of the process of getting a new .jpeg or .gif.
 - i. *On July 26th, 2007, Planning Services sent the following email: Good morning, We received an inquiry in reference to adding your own jpeg or gif on the event calendar. Kellie Bradford or I (Teresa) currently add the graphics to the calendar graphic files in order to keep size of the graphics consistent. All library programmers that have access to the calendar folder, which has access to the graphic files. If there is a graphic that you would like added, but do not see in the graphics folder, feel free to send an email and I will send a couple of version of the graphic requested. We normally respond within 8 hours or same business day. We have access to thousands of graphics that can be placed on our calendar graphic folder. This saves you and staff time from searching for graphics. Please feel to share this information for future reference. Remember, we are here to help you!*
11. Tech Support received a suggestion to examine the current rules for visitor access. Kay Bauman discussed an email over issuing library cards and returned mail (Appendix 3).
 - a. Tech Support will forward this item to Computer Use Group and Library Managers.
12. Tech Support received a suggestion to allow the staff log on to the public computers to have adult access.
 - a. Tech Support announced that there is very little difference between the filters and staff may require different levels of access.
13. Tech Support received a suggestion to examine the time gap between the time the reserve is received and the time the email notification has been sent to the customer.

- a. Tech Support announced that the internal process used by a particular library should be evaluated to determine if the time gap can be reduced between those two times. The new updates to system reserves may also help alleviate this problem.

Action Items

1. Kim Terry will review the FAQ questions and answer them with the assistance of a Tech Use group member and report back at the next committee meeting.
2. The simple search screen sub-committee will meet and discuss their findings at the next Tech Group meeting.
3. Buddy Johnson will work on a write up to add to the Donate Now page for donating photographs or diaries.
4. Deb Willis will conduct research to see what other libraries are doing over RSS feeds announcing new materials or updated lists.
5. IT will update this function to allow exporting of Expenditures to excel spreadsheet.
6. Teresa Goggins stated she would send an email to all programmers informing them of the process of getting a new .jpeg or .gif.
7. Forward two items to Computer Use Group for review:
 - a. Tech Support received a suggestion over public computers. The suggestion called for a security screen saver for the public PCs and the use could return back to the main screen by entering the library card number. Another suggestion was to have a splash screen with information about the five-minute waiting idle rule and how many pages customers can print for free.
 - b. Tech Support received a suggestion to examine the current rules for visitor access.

Upcoming Tech Support Meeting

Tuesday, October 23rd, 2007

9:15 am

Downtown Library, Lee B. Brawner Executive Conference Room

Appendix 1 – ILS Issues

Date: 5/17/2007 12:36 PM

From: midwestcity

To: Technical Concerns <techconcerns@metrolibrary.org>

To: IT

From: Beth Peevyhouse, MC Branch

Last week during the severe weather, we briefly had a power outage. Since this occurred, many of our computers are repeatedly logging customers off and are needed rebooted. This has happened in the past, but very rarely. The number of incidents has definitely increase since the power outage, but I am not sure if there is any true correlation between the two. Either way, our customers are losing their documents each time they are forced to restart the computer they are using.

Also, it seems that the computers are not automatically deleting information when a customer logs off. For example, Customer A saves a document to the desktop, then logs off, expecting it to be deleted. However, when Customer B logs on the same computer, then document is still there. This has happened with a number of web sites, as well.

Thanks for your help!

Beth Peevyhouse

Date: 7/19/2007 11:45 AM
From: Darcus Smith <dsmith@metrolibrary.org>
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Copy:
Subject:

Hello tech group,

I really feel as if we have the most inquisitive and thoughtful
> customers here at BI. Anyway, a customer asked me if I could ask if we
> could have a button to click on that just showed all of the music CDs we had
> in system. He used as point of reference the Magazines button that we have
> on our "available searches" search option in our system. I know we probably
> cannot change the working system, but he asked me twice to do this so I am
> sending an inquiry to you. I'll let him know what you tell me. Sorry to
> bug you about this.
> thanks,

Date: 5/1/2007 8:23 AM
From: Kay Bauman
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Subject: Fwd: Overdue notices sent to customers

***** BEGIN FORWARDED MESSAGE *****

On 4/28/2007 at 4:54 PM Southern Oaks Library <southernnoaks@metrolibrary.org> wrote:

Hi,

Would it be possible on the overdue notices sent to customers that the total in the amount due could read "pending"

<u>Explanation</u>	<u>Title</u>	<u>charge date</u>	<u>Due Date</u>	<u>Return date</u>	<u>amt due</u>
OVERDUE	xx	3/17/07	3/31/07		PENDING

Right now on the bottom of the column, the total due says \$.00, and customers are angry that they have a fine when they return the books. Perhaps just taking out the \$.00 would also alleviate this problem. This idea is submitted by Sally Phillips SO & Ann Aliotta.

***** END FORWARDED MESSAGE *****

Date: 5/2/2007 4:41 PM
From: Kay Bauman
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Subject: Fwd: Tracer lists

***** BEGIN FORWARDED MESSAGE *****

On 5/2/2007 at 4:41 PM Kay Bauman <kbauman@metrolibrary.org> wrote:

From: Kay Bauman <kbauman@metrolibrary.org>
To: rwayland@metrolibrary.org
Date: Wed, 02 May 2007 16:41:23 -0500
Subject: Tracer lists

Managers,

As you may recall the Tech Support decided to create a separate list for the permanent tracers that would be generated monthly in an effort to reduce the number of items to be searched each time. These new lists were to begin this week. Well, we have discovered that the permanent tracers currently stay on the list for 30 days. If we were to do a separate list for the permanent tracers the system list would be reduced by 64 pages and the permanent tracers would only be searched for once. The suggested change would not achieve our original intentions. Consequently, we have decided to NOT change the tracer list into two lists. There will continue to only be one list that has both types of *tracers* that includes *lost and paid* as well as the *in transit*.

Kay

***** END FORWARDED MESSAGE *****

Untitled

Anne Fischer -

I would like to submit some suggestions for changes in the VCirc program.

* Since we are not supposed to clear a lost card for any reason, it seems pointless to continue to have that as an option. It only provides opportunity for both error (hitting it accidentally) and unscrupulousness (employees intentionally disregarding policy).

* I think it would be far less confusing to employees looking up cards as well as take up less space in the database if the old lost card was removed from the system after the information has been transferred to a new card. If it is important to keep track of how many times an individual has lost their card is important, perhaps a counter for this could be added to the customer record.

* I have seen customer cards with far too many tracers placed on them (in some cases, more than 25), and think that this problem could be prevented by placing a restriction or limitation of no more than 5 (or whatever number is deemed within reason) tracers allowed to be placed on any individual's account at one time. This allows the customer and our system the opportunity to look for the material while preventing a customer from claiming that inordinate numbers of materials have been turned in and employees allowing this to happen.

Thank you for recieving and considering my thoughts.

Stormy Lee

Date: 5/9/2007 10:50 AM
From: Aaron Killough
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Subject: Staff category in VCirc

Tech. Group,

This is a suggestion from Melanie in Technical Processing. She was wondering if there could be a "Staff" category in vCirc. Persons in this category would not be assessed fines, but staff would be required to return materials if patrons requested them.

Submitted on behalf of Melanie by Aaron Killough--Cataloging

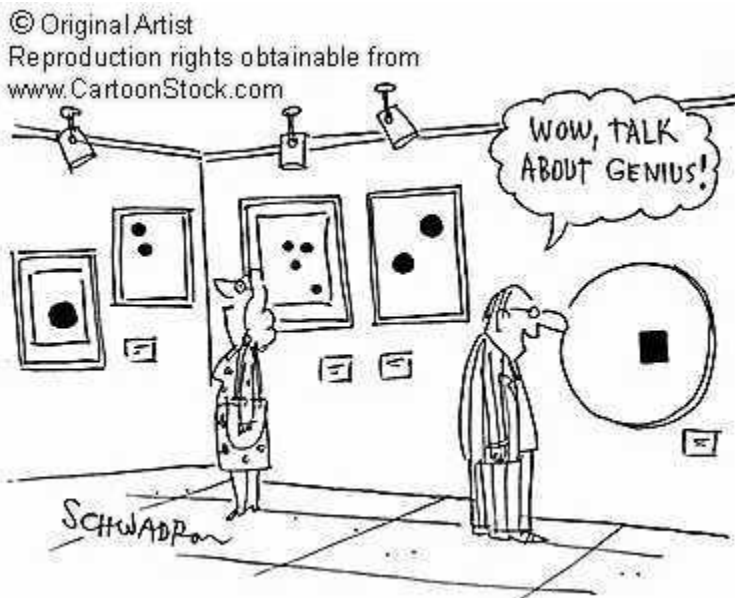
Date: 5/8/2007 2:32 PM
From: Karen Bays
To: Edmond Library <edmond@metrolibrary.org>
Copy: Technical Suggestions <techsuggestions@metrolibrary.org>
Subject: attn: Sandra--Re: reserves

Hi Sandi,

This is a great idea (#1)! Thank you so much for looking at the way we do things and suggesting an improvement--that is very helpful. The tech group meets regularly to discuss tech issues and review staff suggestions, and they will let you know what they decide.

Your #2 suggestion is also helpful, and in a perfect world they might be able to implement it. However, I don't believe that our current catalog infrastructure would allow us to implement #2 because of multiple acquisition dates for the same title which generate many different bibliography numbers for that title. Since the reserve process is dependant upon bibliography numbers, I think it would be very difficult to write new code which would link bibliography numbers for the same title. Many titles have only one bib number, but many others, especially classic fiction (e.g. Thomas Hardy's Return of the Native), have two or more. Don't know if this makes any sense--please ask me if not clear. Also, I don't know anything about system engineering, so it might be easier than I think. It never hurts to ask.

Thanks again for helping MLS by thinking outside the box!
Karen



***** REPLY SEPARATOR *****

On 5/8/2007 at 1:57 PM Edmond Library wrote:

1. If you are checking out a reserve item to a customer and it does not match any of their reserves, it should create a prompt for an override. This will prevent reserve mix-ups just in case two items are interchanged and the slips do not match the item.

Ex: John Doe reserves a movie and Jane Smith reserves a movie. When their reserves are processed John Doe's slip gets put on Jane Smith's movie and vice versa. Right now, if John Doe came up to check out his movie, the clerk would just verify the name on the slip and check out the item to the customer. If this is done too fast, it will not get caught by the customer until too late. When it is checked out, we cannot look up which customer it SHOULD have gone to. If there is a prompt, we can then stop and verify the item to see if it is correct.

2. Also, if a customer puts a reserve for an item, and then comes in and finds that item on the shelf; when the customer checks out the item, it would be nice if the **reserve** for the item was automatically deleted.

Thank you,
Sandra Gonzaga

Date: 5/17/2007 3:29 PM
From: Edmond Pages
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Copy: Karen Bays <kbays@metrolibrary.org>
Subject: reserves suggestion for TechSuggestions

Often, customers put a new item on reserve, wait, wait, and wait, and then when their 153rd place in line comes up, they are on vacation, they miss the reserve, then they start back at the bottom of the list again. Is there any way we could add something to the Reserves screen on CyberMARS so that customers could enter a range of dates during which they would be automatically skipped by the computer but would not lose their place in line?

Thank you,
Laura Parker
ED Page

Date: 5/22/2007 12:58 PM
From: ltemple@mls.lib.ok.us <ltemple@mls.lib.ok.us>
To: techsuggestions@metrolibrary.org
Copy:
Subject: shelf # designation for YA books

Friends,
Could you consider changing the shelf number designation for Young Adult books in the library catalog to YAXXX (YAFIC, YA736.9, etc.)? Most customers do not know to go to the 'holdings' screen to see location.

For instance: The shelf number for Code Talker, by Joseph Bruchac is currently listed as F/BRU. If this were changed to YAFIC/BRU or some variation thereof, it would make locating the book much more efficient.

Thanks for the consideration, Linda Temple

Linda Temple, Librarian
Midwest City Library
8143 E. Reno
Midwest City, OK 73110
405/732-4828 (phone)
405/606-3451 (fax)

Date: 5/21/2007 6:40 PM
From: Deb Willis <dwillis@metrolibrary.org>
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Copy:
Subject: Fwd: Public PCs in libraries
Attachments: suggestions.doc

***** BEGIN FORWARDED MESSAGE *****

On 5/17/2007 at 8:55 PM bstockton-hiss@cox.net <bstockton-hiss@cox.net> wrote:

>I'm one of the computer assistants at Belle Isle Library. Debbie Robertus
>suggested I send the attached to you. If nothing else, thank you for
>listening.
>
>Brenda Stockton-Hiss
>
>

***** END FORWARDED MESSAGE *****

- 1) A woman complained tonight about coming back to her PC from the printer to discover another customer at the machine. There was a phone list on the monitor so it's not like the second woman thought it was not in use. This customer was very upset. As a result of this incident, we would like to suggest a security screen saver for the public PCs, one that would allow the user back on by entering the library card number.
- 2) We still get complaints from users who are knocked off after the machine is left idle for five minutes. It would be handy to add something like a splash screen with some of the information our customers so conveniently forget such as the five-minute rule, how many pages can be printed for free, etc.

Yes, we know anything added to the present program just bogs things down. We explained these are public computers and care needs to be taken by the user. These are merely food for thought.

Date: 6/27/2007 3:05 PM
From: Kay Bauman
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Subject: Fwd: Suggestion: mlsBudget - Exporting Expenditures

***** BEGIN FORWARDED MESSAGE *****

On 6/27/2007 at 12:14 PM Deb Willis <dwillis@metrolibrary.org> wrote:

Greetings!

I would like to suggest that mlsBudget offer exporting of Expenditures to a spreadsheet.

Thanks!

deb

***** END FORWARDED MESSAGE *****

Date: 6/27/2007 5:30 PM
From: Karen Bays
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Subject: event calendar question

Hi Tech Group,

It is currently impossible for us to add our own .jpeg or .gif to the event calendar if we do not find an illustration for the online calendar that is suitable. Is it possible to give us options to add our own?

Thanks,
Karen Bays

Date: 6/29/2007 10:05 AM
From: Sue Hall
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Subject: visitor internet access

We have a customer who has been using visitor internet access for a number of months and different librarians have advised him that the visitor status is supposed to be temporary access to the internet. We have been rather lenient since he is out of work and trying to get a job by applying online and responding to email about positions. This person told us that he has a Luther address but lives just over the Logan county line so doesn't qualify for a MLS card.

After speaking with him on Thursday June 28th, I learned that he had gone to another library and gotten a card but was later called (probably by Circulation Control) that he didn't qualify for the card. He complained to us that the new card has "returned mail" on it. He was very agitated so we gave him the visitor pass again.

Most of us kind of recall that visitor access was intended to be used for no more than 30 days but do we have any specific rules about that? We thought this might be a question for the Tech Group.

Thanks for your input,
Sue Hall
Librarian
Belle Isle Library

Date: 7/8/2007 1:42 PM
From: Jonathan St.Aubin
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Subject: staff login adult access

I use the staff log in when I do my computer tutoring here at Edmond. I noticed it does not have adult access. I think it should have adult access. One of my student wanted to get a print of a piece of art and we were unable to get to several sites.

Thanks Jonathan

Date: 5/22/2007 1:08 PM
From: Karen Bays
To: Technical Suggestions <techsuggestions@metrolibrary.org>
Copy: Edmond Pages <edpages@metrolibrary.org>, Libby Holshouser
<lholshouser@mls.lib.ok.us>, Edmond Library <edmond@mls.lib.ok.us>, Jean Johnson
<jjohnson@mls.lib.ok.us>
Subject: time delay request on customer reserve notification

Dear Tech Group Members,

I need your help. I know this question has come up several times previously, but I was hoping that we might revisit it. It could be that when we get the new reserve printer-system later this year that some of our problem will be alleviated, but I still think Edmond will have a problem even with this improvement.

Customers see that their item is showing "READY" on the computer, and they drop everything to go pick it up.

Because Edmond processes a very large volume of reserves, I believe that we may have a unique problem in that it is much more efficient for our Pages to receive an entire cart of reserves all at once rather than many small batches.

However, processing the reserves in small batches, which is what we have recommended for the Pages and Clerks to do, makes it much easier/quicker to hunt for reserves before they have been shelved when a customer comes in immediately after seeing that her reserve is ready.

But due to the overwhelming volume of items to receive at Edmond, Pages often receive an entire cart at once, and those customers who come in after seeing their reserve showing "READY" when it is not really ready, must wait for several people to dig around hunting for items. So, this method is not really all that efficient after all, when you factor in several wild goose chases for customers. When they do receive an entire cart at once, Pages make an effort to stack reserves in a logical manner on the cart, which aids in finding reserves before they are shelved. Circulation clerks print item inquiries which helps pinpoint where the item might be.

If there were a time lag somehow added into the programming, so that the customer would receive the "READY" notification on their screen XX number of hours after it was received that would help our staff so much, and would create happier customers.

A few years ago, we tried posting signs informing customers (and having clerks inform customers directly) that their reserves will be ready for pickup after 1:00 p.m., and this was not found to be particularly helpful. Currently, we have divided the entire shipment of reserves up into portions where the morning Pages receive and process about 1/2 or more of all reserves, and the afternoon Clerks receive about another 1/4, and the afternoon/evening Pages receive about another 1/4.

Just thought it was worth a try to ask again. I understand that things are probably working much better

at other libraries that have fewer reserves to process.

Thanks for your consideration,

Karen Bays

Appendix 2 – Deb’s Handout at Tech Support Meeting

- ***FAQ: Public Multi-use Computers***

Note: this are not listed in any particular order

1. Why can't I use a library computer to download MLS emedia?
2. Why can't I extend my time, even when others are waiting, so I can complete the project I am working on?
3. Why can't there be one or more walk-up type computers with short time limits?
4. Why can't MLS restrict the content minors use on the computers so they aren't spending time looking at MySpace or playing video games?
5. Why can't I log into the computer system at ten minutes before closing (or get on the waiting list at twenty-five minutes before closing when there is a waiting list)?
6. How do I read the reservation slip and what does it tell me about the computer I am assigned to use?
7. How do I know when a computer is assigned to me?

- ***Help Text on Simple Search Screen***

1. Title Search: Enter the title, omitting “the,” “a,” “and” at the start of the title. Correct spelling does matter. If your result is unsatisfactory try your search as a keyword
2. Subject Search: Enter a single subject. Correct spelling does matter. If your results are unsatisfactory try your search as a keyword.
3. Shelf Number Search: This search only searches non-fiction titles. Do not include the “J” at the beginning of the shelf number. The / is essential to separate the first line from the second line.
4. Keyword: change to reflect implied “and” – “Type one or more descriptive words. Place quotation marks around phrases. Searches with consecutive words not in quotation marks are combined with an implied ‘and.’”
5. Add statement advising to “mouseover” buttons for search tips: “Mouseover each search button for search tips.”

Appendix 3 – Kay's Information to Library Managers over Issuing Library Cards

To: Managers of Library Operations

From: Kay Bauman

Date: October 5, 2006

Re: Issuing library cards & returned mail

Please ensure that all staff read and fully understand the procedures, which will take effect on Wednesday, October 11, 2006.

It has come to the administration's attention that MLS continually has a large number of returned mail from 800 W. California, which is the City Rescue Mission. The loss rate for materials from borrowers listed at that address is considerably higher than our system average. After looking into the situation, we have learned of a couple of factors that are of concern:

- Staff have not consistently used acceptable forms of identification when issuing library cards
- It appears that staff have occasionally removed returned mail flags without re-validating the customer's address

The combination of these factors has made it impossible for us to communicate with some customers, which means that the customers may be unaware of problems associated with their library cards.

The administration has reviewed and clarified the guidelines as explained in our training material to correct some of the inconsistencies verifying and/or re-verifying name and address information. Specifically we have reviewed and/or clarified the following procedures:

- Issuing library cards
- Removing returned mail flags
- Visitor cards for computer use

Additionally, in an effort to address the higher than average loss rate for materials borrowed by those listing 800 W. California as their address, we have placed a tote at the City Rescue Mission to serve as a book drop. The tote has a sign that says "Looking for Lost Books". Our Maintenance team will make regular stops to pick up the returned materials and the Downtown staff will check the materials in from this location as "Found on Shelf".

Ensure that all staff read this memo and follow the procedures below.

Source: AGOP 104: Got Cards? Issuing Library Cards Page 12 & 13 – **Note:** *portions of this section have been modified slightly in hopes of clarifying the differences between identification that verifies a person's name and those that verify an address.*

Eligibility Requirements

1) The first step in issuing a library card, Application and Identification

- a) The list of acceptable forms of identification is printed on the back of the application. It would be most helpful if you could encourage customers to fill out applications in blue or black ink. Color ink such as red and pink etc. do not scan well, if at all. Please remember to fill out the "FOR OFFICE USE ONLY" in black or blue ink also.

- b) Give the customer the appropriate application to fill out. Explain the identification requirements and, if necessary, give directions on how to fill out the form.
- c) Ask to see two forms of identification from those older than 17 years of age. At least one of these must verify the current address. Identification with the customer's picture on it is preferred. For those under 17 years of age ask to see at least one form of identification.

(1) **Identification & address verification for a Library Card Policy and Procedures Manual AL 200 Eligibility.**

(a) Acceptable name verifications are:

- Driver's license (may be used to verify name or address not both)
- Current vehicle insurance verification form
- Personal check with printed name and address (may be used to verify name or address not both)
- Student ID card, with picture of the student on it, or other acceptable evidence of current school or college enrollment
- Social security card
- Medicare or other medical plan card
- Current credit card
- Military ID card; include rank and serial number on the application.
- Voter registration card
- Oklahoma county ad valorem property tax statement (may be used to verify name or address not both)
- Parent or guardian's identification for students under age 17 who are unable to provide proof of eligibility, provided the parent or guardian meets eligibility requirements

(b) Acceptable address verifications are:

- Driver's license (may be used to verify name or address not both)
- Personal check with printed name and address (used to verify name or address not both)
- Oklahoma county ad valorem property tax statement (may be used to verify name or address not both)
- Utility bills or receipts postmarked within 30 days
- Telephone directory verification for a student applicant;
- Telephone directory verification for an adult applicant if the adult has provided at least one ID with his/her picture on it or two other sources for name verification
- Postcard (MLS form #011) mail-back procedure -- staff is instructed to use this method for those who cannot meet the foregoing requirements.

(c) Pioneer library system card verifies their eligibility for a reciprocal card.

- d) Check the application for completeness and legibility.
- e) Sign your initials on the application in the space labeled "ID checked".

Flags

Returned Mail

A customer card that has a Return Mail message, or flag, may not be used to check out materials until the flag is removed. A Return Mail flag means that an overdue statement, bill, or reserve notice that was sent to the customer was returned to the library as undeliverable. Before the customer can use the card, the address must be re-validated.

To re-validate the card, the customer must fill out a new application form. Use the same procedures for verifying the name and address as when issuing a new card.

If the customer indicates that the address in our records is correct, follow the same procedures as when issuing a new card:

- Have the customer fill out a new application form
- Ask to see an acceptable form in order to verify his/her address:
 - Driver's license (may be used to verify name or address not both)
 - Personal check with printed name and address (used to verify name or address not both)
 - Oklahoma county ad valorem property tax statement (may be used to verify name or address not both)
 - Utility bills or receipts postmarked within 30 days
 - Telephone directory verification for a student applicant
 - Telephone directory verification for an adult applicant if the adult has provided at least one ID with his/her picture on it or two other sources for name verification
 - Postcard (MLS form #011) mail-back procedure -- staff is instructed to use this method for those who cannot meet the foregoing requirements

When replacing, updating, or exchanging an old card for a customer whose address has changed, check to make sure that the new customer card is not flagged Returned Mail. If the customer's card has been flagged returned mail, remove the flag when you update the information.

Removing a Returned Mail Flag

- 1) Have the customer fill out an application, whether any of the information has changed or not, then verify the information. The customer must show two forms of ID, one of which must verify his/her current address.
- 2) Scan in the customer's card.
- 3) Touch or click on the Customer tab. Enter the new information in the Customer Record screen and touch Apply.
- 4) Touch or click on the Flags tab.
- 5) In the Returned Mail box, select Clear to remove the flag.

- 6) Write in the upper right hand corner of the new application "Update" if there was a change to any of the information. Write "Same address" on the new application if the information on file was correct.

Note: Staff may issue a visitor card for computer use so that an individual who has a returned mail flag on his/her library card may have time to verify his/her address information. Do not issue a visitor card to customers with other types of flags or stops on their card. Customers with other types of flags or stops will need to clear their records in order to use the computer. The visitor card is for customers who cannot verify that they reside in our service area.

For more information about visitor cards issued for computer use see the "What's New" section of the Intranet or click this link: http://morris/GotInfo/general/cu_visitorsproc_2006-06.pdf

Procedures to follow for issuing visitors cards for computers.

Customer:

1. Fills out a *Visitor's Request to Use Library Computers* form.
2. Gives the completed form and shows identification to a staff member.
3. Receives a card number and password to use a library computer throughout the day.

Staff:

1. Numerous cards will be kept at reference or circulation desk for visitors —both children's and adult's.
2. When a customer asks for computer access, staff will take one card, enter into the computer the card number and assign a four digit password (see footnote) that will be put into the place of the name in the computer. Staff will write this information onto a slip of paper to give to the customer. You can make up cards in advance if you want to, and clip the customer's slip of paper to the card, and just have them ready to hand out. Be very careful that the adult or children's portion of the card information is filled out correctly. We do not want to give the wrong type card to either adults or children. This will mean that visitor children will not have access to Internet, because all children's cards will be blocked from Internet until their parent approves Internet. If the visitor parent is actually there, s/he can sign the Internet permission portion of the form and the child will have Internet access. This will involve extra effort by the staff, and should not occur often.
3. The staff will log the visitor's card on the log sheet. Since this has confidential information, this log must not be left visible to customers.
4. The staff will place the actual plastic library card, in the "in use" section of the card box.
5. The customer will then have access all day, in accordance with the general use patterns of the library.
6. If a customer asks for a second card during the day, the staff will glance up the log list, and say, "I'm sorry, but you have already been issued a card today, let me write the number for you again." And do so.
7. Each evening about 15 minutes before closing, the staff will take the used cards to circulation, scan them, then replace the password with a new password for the next use. The cleaned cards will go back into the "Ready for Use" section of the card box.
8. At the end of each day, send all of the completed *Visitor's Request to Use Library Computer* forms to the Library Manager.

Footnote on passwords: A password is a four-digit word or nonsense word that is put into the name section of the application. Each staff can use the same password all day, or can change it with each customer. I processed five cards using BOOM as the password, and it worked just fine. The point is to mix up the cards and the passwords on a daily basis. In other words use one word on Monday, and a different one on Tuesday etc.