

DALNET Circulation Task Force Meeting

September 19, 1990

Minutes

1. SAS Reports Update

- a. Louise reported that Dody Fox had created a SAS report this Summer that listed Wayne State's delinquent borrowers, grouped by patron category. It listed all Wayne State borrowers whose unpaid bills were above a specified amount as of a specific date. Sample pages from the report were distributed.
- b. Jeff explained how the list of delinquent borrowers was used to generate follow-up bills. A cover letter, varying by patron category, was included in the mailing. Sample follow-up bills and cover letters were distributed.

Wayne State is working on a procedure for regularly generating follow-up bills and for identifying those patrons who don't respond, so the appropriate action can be taken. When the process is operational later this Fall, other DALNET libraries will also be able to use these reports and bills.

2. Infopass Policy/Procedure

Jeff reported on his test to estimate the number of ID subrecords that can fit on a patron record. He input over 30 ID subrecords with no problem. The number will vary, of course, depending on space taken in the record by address subrecords and multiple patron group information.

Jeff will draft a policy statement for creating ID's for Infopasses in the shared DALNET patron database. It may be desirable, for those libraries honoring Infopasses, to try to minimize the number of ID subrecords used for one patron. An old ID can be re-validated for subsequent uses by that patron, rather than issuing a new ID for each Infopass.

3. Social Security Number (SSN) Policies

The social security number section of the minutes from the July meeting was reviewed. Additions were made to indicate what to do with SSN tapeload problems. Louise will write the SSN policy recommendations and attach to the minutes for review before forwarding to the DALNET Board.

4. Guidelines for Resolving Patron Name Differences

The draft guidelines previously distributed were discussed. Periods are not to be input after initials, but variations can be ignored. Louise will revise the guidelines and distribute with the minutes for final review at the next meeting.

5. Disclaimer Wording on Overdue Notices

The group reviewed a sample printout of an overdue notice with the proposed disclaimer wording. The wording will be revised to: "If you returned these items, please call the library at the above number." Samples with the revised disclaimer will be sent to DALNET Project Managers for their comments. The disclaimer will also be tested on overdue mailers.

Gerry Bosler invited the group to **Macomb Community College South Campus** for the next meeting, November 7, from 2:00 to 4:00 p.m. One agenda item will be planning a DALNET Circulation Forum session to which circ staff from all DALNET libraries will be invited.

Notes by,

Louise Bugg
September 26, 1990

Attachments:

1. WSUL Codes for Patron Record Note Fields
2. DALNET Guidelines for Resolving Patron Name Differences, Sept. 19, 1990
3. Patron Record Recommendations