

DALNET Circulation Standards Task Force
Summary Minutes
October 18, 1988

1) **Review of Minutes of September 21, 1988**

- a) It was pointed out that, although the Task Force recommends the use of separate patron records for ILL, any Dalnet institution can choose the procedure it will use. For those Dalnet members who do use separate patron records for ILL, it is recommended that the procedures outlined on September 21 be followed.
- b) In a follow-up to the September 7 minutes, the following correction was made: work on recommendations for the patron record has been started but is not yet completed.

2) **Patron Record**

a) **NOTE FIELD**

Information which appears in the NOTE field displays on the charge screen. Since there is only one NOTE field per patron record (not one per subrecord) there will have to be rules on who can enter data into this field, how data is entered and who can delete data from this field. The primary reason for putting information into this field has been to explain a block on a patron record. The following recommendations were made about the use of the NOTE field:

- i) Messages that are used in the NOTE field should be standardized within service unit but not necessarily throughout DALNET;
- ii) Only the person who enters data into the NOTE field should remove the data;
- iii) An institutional prefix should be included when data is entered into the NOTE field. In response to DPL's suggestion that the NOTE could be used for parental information, it was proposed that the use of the department field, the patron code field, the name field or a combination of all of these could possibly be a better way to capture this data. The use of the proxy name format was also suggested.

The Task Force has no recommended procedures, policies, guidelines etc. for the remainder of the patron record.

3) **Use of Patron Records**

Each Dalnet institution must follow the Library Privacy Act and treat patron records as confidential information. Information in the patron record is to be revealed only to the patron who provides appropriate identification. In addition, only the information from your institution's subrecord should be given to the patron. This raises an issue that should be considered by the Dalnet Board--are joint patron records owned by Dalnet.

4) Tapeload Guidelines

In a tapeload the name will never be updated. This will create a problem area when there's a match on social security number but not on name. A standard format will minimize the number of mismatches. However, institutions often have no control over the format of the name as it appears on a tape. The following guidelines for the resolutions of mismatches in the patron record are recommended by the Task Force:

- a) The resolution of trivial differences is at the discretion of the institution;
- b) When a choice has to be made between 2 forms of a name, use the most complete form of the name;
- c) Anytime there's a question, leave the first record in the system, block the patron ID and put a message in the note field to get correct name, address, or social security number.

Still to be resolved is a procedure to indicate that a name has been corrected.

5) Item Record

The item record will be a primary topic of discussion at the next Task Force meeting.

6) Reserves

In preparation for a discussion of reserves, Task Force members are asked to bring the following to the next meeting:

- a) Copy of the item record;
- b) 4.5 T.O.M. section on reserves;
- c) A list of the types of things included in the reserves collections.

Classifications of reserve collection materials now include:

- a) true class reserves;
- b) general/permanent reserve;
- c) photocopies;
- d) unclassified materials;
- e) uncataloged materials;
- f) pseudo-instructors;
- g) personal copies.

7) Next Meeting

The next Task Force meeting is scheduled for Tuesday, November 1, 1988 at 2:00 p.m. at DPL.