

OWLSnet Patron Registration Committee Meeting
Outagamie Waupaca Library System
June 18, 2008

Present: Brian Kopetsky, APL; Carolyn Habeck, HPL; Barbara Wentzel, LIT; Ann Hunt, NLP; Laura Jandacek, Gerri Moeller, OWLS

1. Call to order
 - The meeting came to order at 9:30am in the OWLS meeting room.
2. Minutes of the April 3, 2008 and May 20, 2008 meetings
 - The minutes of the April 3 meeting were accepted as distributed.
 - There was a correction to the minutes of the May 20 meeting. It stated that there would not be a pop-up message added to the out-of-state patron accounts, which is incorrect. Minutes stand as corrected. Gerri added the pop-up message but then removed it due to an individual library conflict with this message. We will explore this issue later in the meeting.
3. Patron Registration Procedures
 - The group reviewed the drafts of the procedures related to Walking Books, Mail Returned and Merging/Deleting Patron Records. The group discussed email bounce procedures and agreed to add email bounce procedures to the Mail Returned section.
 - Kathy Mitchell, CPL was unable to attend this meeting but requested we review the following specific areas which she communicated to Gerri before the meeting.
 - . The wording will be changed in the Expiration Date piece and will read as follows: "An expiration date not to exceed three years is required for all cards".
 - . The group discussed the insertion of "E" behind the telephone number in patron accounts who have requested email as their notice preference. This is an OWLS recommended procedure- many libraries use this "E" as a visual cue in regards to notifying patrons of items on the hold shelf. It was agreed to add this procedure into the Notice Preference section.
 - . The Name Changes section will be changed and deleting the old account will be removed from the procedure.
 - According to the OWLSnet Borrowers' Card Program, any OWLSnet library may issue a local library card to an out-of-state resident, however OWLSnet libraries are not required to honor these cards. Currently, since the local library cards look the same as a standard OWLSnet card, and the cards are not coded differently, there is no way for libraries to be aware that a card is a local library card. A pop-up message was put on out-of-state patron records, but this interfered with selfcheck machines. The group discussed this matter and it was determined that the issue should be brought up later at AAC.
 - Committee members received a draft copy of the OWLS Recommendations for setting up PC Management with SAM. The procedures for allowing children access to the Internet and global settings for linking patrons to the SAM database may have an impact on our current registration procedures. OWLS will be recommending a redesign of the OWLSnet patron registration form.

Ideally, the new form would be available for printing from the Internet and contain an area to document patron internet access preference.

- Committee members also received a draft copy of an InfoSoup online application for patron registration to the group for consideration and feedback. The form is larger (8 ½ x 11) than the current registration cards and many libraries would need to redesign their current storage systems to retain these records. This enhanced form has the potential to provide more accurate patron information (including internet preferences), communicate important library policies and expedite the overall patron registration process.

4. Survey Results

- 32 libraries responded to the survey about their current patron registration practices. The group reviewed the compiled data and the final comprehensive document of survey results.
- Committee members observed that the answers to the survey vary greatly; some libraries may be firmly committed to their current practices, so establishing a standard patron registration procedure may be challenging.

5. What's next?

- Gerri will modify "Patron Procedure Document" and send out.
- The group will review the draft of InfoSoup Application for library card and provide feedback.

6. No new meeting was set at this time.

7. The meeting was adjourned at 11:35am.