

Circulation Services Group Meeting of March 2, 2021

Tuesday, March 2, 2021; 2-3:30pm [Zoom Link](#)

Participants: Brian Light (SSD), Jenna Jackson (Access Services), Mark Marrow (Access Services), Phylicia Mosiah (LHS), Kristen Van Vliet (ILL), Ellen Dario (NRLF), Jenny Schuelke (EPS), Rosemary Sallee (Preservation), Angela Arnold (MUSI), Albert Chung (EAST), Jen Osgood (AHD), Francis Francisco (LHS), Erica Howland (SSD), Fedora Gertzman (Bancroft), Brice Sullivan (LHS), Peter Basmarjian (SSD), Samantha Teremi (AH/C), Molly Rose (ENVI), Beth Shippey (EPS), Paul King (IGS), Neda Salem (Ethnic Studies), Sophie Rainer (Access Services), Dori Hsiao (SSD), Michael Villarreal (EPS), Peter Soriano (EPS), Agustin Ramirez-Lee (ITSL), Nancy Lewis (Doe/Moffitt), Eileen Pinto (LIT), Michael Golden (LBNL), Lillian Lee (SSD), Marito Solis (Doe/Moffitt), Tom Brown (Doe/Moffitt), Michele Buchman (LHS), Noel Gundestrup (NRLF), Sheehan Grant (AHD)

1. Introductions
2. Announcements
 - a. Alma logins have been generated for trainers; should be dispersed in the near term.
 - b. No processing fees attached to items billed going forward
 - i. Should say "If you had items due 2/1 and your items were billed in that 30 day cycle, those items billed 3/1 won't have processing fees.
 - ii. No processing fees generated after 2/8
 1. Anything due prior billed as normal
3. Claims returned process update (Brice)
 - a. Discussed issue of claims returns, formed a sub-group (Brice, Brian, Jenna, Neda)
 - b. All items that have been claimed returned have had their due dates updated to 11/1/21
 - c. All items have been marked using the claims return status
 - d. Additional Proposals will be taken to and approved by ASAG
 - e. Continuing issues
 - i. How to roll up existing claims returns
 1. Both items that were claimed returned from the current batch but not given the 11/1 due date, and those CRed before the closure
 - a. A possibility of changing the status from Claims Returned to something else and changing the
 - ii. The current CR process is not tied to the due date, but rather a 30 day schedule from the initial date
 1. Updating the timeline of searches, so that automated messages don't go out
 - iii. Dealing with holds
 1. Typically don't extend due dates if there is a hold.

- a. A potentially solution would be to cancel holds for items available through HathiTrust
 - iv. Billed items
 - 1. Typically don't extend due date? after an item has been billed.
 - 2. It appears that the 3rd notice blocks the account and keeps us from modifying the date at all
 - v. Large volumes of claims returns from one patron
 - 1. Is there a limit to the number of items we will allow a patron to CR
 - vi. For ILL claims returns, please contact ILL prior to making any modifications to the record
 - 1. Lender governs what we can permit
- 4. What do we and our Patrons want to know about Bancroft and their collections? (Fedora)
 - a. Preparing for presentations, both "how to use Bancroft" to CSG and
 - b. Questions about Bancroft
 - i. Can non-institutional patrons use physical Bancroft material during the pandemic?
 - 1. No
 - ii. What resources are currently available?
 - 1. All digital material
 - 2. Physical material in person by appointment
 - iii. Can Bancroft items be taken to non-Bancroft locations
 - 1. No
 - iv. Are there other special collections that we have access to through Bancroft?
 - v. In normal times, anyone is able to access the material, with proper identification.
 - vi. Does Bancroft have any browsable material?
 - 1. No, not really, but there are galleries and displays
 - vii. The decision to limit access during the pandemic is due to limitations by city/county
 - 1. Only "in person academic research" is considered
 - viii. Biggest taboos that patrons break?
 - 1. People having their phones on, or having pens
 - 2. People aren't generally turned away
 - c. Questions about us from Bancroft
 - i. [Spreadsheet about special collections holdings at the various libraries](#)
- 5. Open Discussion