2020-04-27 Resource Access Meeting Notes

Date
27 Apr 2020

Attendees
- Andrea Loigman
- Holly Mistlebauer
- Elizabeth Chenette
- Erin Nettifee
- Brooks Travis
- David Bottorff
- Cate Boerema
- Darcy Branchini
- Kimie Kester
- Cornelia Davis
- HB Kouns
- Jana Freytag
- Joanne Leary
- Laurence Mini
- Mark Arnold
- Emma Boettcher
- Cheryl Malmborg
- Cornelia Awenius
- Donna Minor
- Thomas Paige
- Anya Arnold
- Mary E Yokubaitis

Discussion Items

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
<th>Who</th>
<th>Description</th>
<th>Goals/Info</th>
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| 2min  | Admin trivia | Andrea Loigman  |             | - Notetaker - Elizabeth Chenette  
|       |            |                 |             | - Take a look Holly's video on using manual fee/fine charge table |
| 20min | fines /fees | Holly Mistlebauer | Refunding fees/fines process | Understanding of how the amounts should be handled for round 2 implementers. Create sub-group for accounting going forward. |
| 20min | Reques ts   | Cate Boerema    | Request handling when item is marked Declared lost, Withdrawn or Missing | - What should happen when an item that has one or more open requests on it is Declared lost, Withdrawn or Missing?  
|       |            |                 |             | - Current behavior is that the Request status becomes "Open - Not yet filled"  
|       |            |                 |             | - But what then happens to those requests? How does the staff know to cancel them or move them?  
|       |            |                 |             | - Deck for discussion: https://docs.google.com/presentation/d/1T6D4W3tswLnyrd61LWPHTncOFVL82-T5JA8CZBssPwk/edit?usp=sharing  
|       |            |                 |             | - Goal is to answer questions in deck |
| 20min | MVP        | Holly Mistlebauer | Discuss RA related MVP slippage | PO MVP Feature Status |

Meeting Outcomes

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Product Owner</th>
<th>Planned Release (if known)</th>
<th>Decision Reached</th>
<th>Reasoning</th>
<th>Link to supporting materials</th>
<th>Comments</th>
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<tbody>
<tr>
<td>e.g. loans, fees /fines</td>
<td>Name</td>
<td>e.g. Q4 2018, Q1 2019</td>
<td>Clearly stated decision</td>
<td>Because</td>
<td>e.g. mock-up, JIRA issue</td>
<td>...</td>
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If you mark an item declared lost, claimed returned, missing, withdrawn and there are open requests on the item:

1. There should be a popup letting you know
2. There should be a link to the requests app (pre-filtered to show the relevant request(s))
3. You can then move the request to another item or cancel it
4. You can also use the requests csv report periodically to check for items with status declared lost, missing etc with open requests to catch any that might have been missed in this process

JIRA feature has been created:

- UXPROD-2411 - Display Popup When Requested Item is Marked Missing, Withdrawn, Claimed Returned or Declared lost

Delivery requests side bar convo:

- Delivery requests have no service points (they have requester addresses)
- When you check in a delivery request at any service point
- The system prompts you to check the item out to the requester
- If you decline to do that, the request will stay in "Open - Awaiting delivery"
- There is no notion of In transit for a delivery request
- There is no notion of a delivery request fulfillment service point -
- It sounds like folks would like to have the request status In transit until it gets to a fulfilling service point and, only when it gets there, to have the check in trigger check out to the requester
- This would likely require flagging service points that can do delivery and some way of knowing which items should go to which delivery service points for fulfillment?

Cate will put this topic on the RA SIG agenda document for future discussion

Notes

Reminder for everyone to look at Holly's video on using manual fee/fine charge table.

Holly Mistlebauer—Refunding fees/fines process

--Holly walked the group through a slide deck explaining how the refunding process will function for Round II implementers (Summer 2020), Round III (December 2020), and where we’d like it to be for Round IV implementers (Summer 2021) (Refunding fees/fines process)

--Holly will take the basic process forward to the Round II implementers to ask if this will meet their initial needs.

--Holly/Andrea are calling for volunteers for a sub-group for to determine needs related to the refunding process and institutional accounting going forward to Round IV. People may contact Holly or Andrea to sign up to be on this subgroup. Meetings on this sub-group most likely won’t start right away.

Cate Boerema—Request handling when item is marked declared lost, withdrawn, or missing

--Deck for discussion: https://docs.google.com/presentation/d/1T6D4W3fswLnyrd61LWPHNcOFVL82-T5JAJ8CZBspwk/edit?usp=sharing

--When marking an item declared lost, claimed returned, missing, withdrawn, but there are open requests on the item, the group suggested a pop-up that prompts staff for further action related to the request. Possibly with a link to the request (not MVP) so that the request could be canceled or moved to another item. Additionally, the in-app requests report would be another way to catch any requests on lost, claimed returned, missing or withdrawn items.

--When items are checked in with active delivery requests on them, FOLIO checks the item out to the requester to fulfill the delivery request, then the item is mailed out to the requester. A few group members were concerned that the item was checked out to the requester but may then need to be sent to the location that will mail it out for delivery. In transit is not used with delivery requests currently because there are no service points associated with delivery requests. This topic was flagged for future discussion by the RA SIG group.

Holly Mistlebauer—Discuss RA related MVP slippage PO MVP Feature Status

--Tabled until Monday