2019-11-21 Resource Access Meeting Notes

Date
21 Nov 2019

Attendees
- Andrea Loigman
- Holly Mistlebauer
- Sharon Wiles-Young
- Erin Nettifee
- Donna Minor
- Joanne Leary
- Cheryl Malmborg
- Andy Horbal
- Emma Boettcher
- Elizabeth Chenette
- Brian Arrigo
- Laurence Mini
- David Bottorff
- Cate Boerema
- Kimie Kester
- William Weare
- Donna Minor
- Rameka Barnes
- Mary E Yokubaitis
- Allison Estell

Discussion Items

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
<th>Who</th>
<th>Description</th>
<th>Goals</th>
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</thead>
<tbody>
<tr>
<td>5min</td>
<td>Housekeeping</td>
<td>Andrea Loigman</td>
<td></td>
<td>• Notetaker - Elizabeth Chenette</td>
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<td></td>
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<td>• Reminders:</td>
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<td>• Add your name to the Wolfcon attendee list (for either physical or virtual attendance)</td>
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<td>• Huda Khan will answer questions related to Cornell Usability test methods and results at 11/25 meeting. (2019_09_FOLIO_Circulation Report.pdf)</td>
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<tr>
<td>20min</td>
<td>Aged to Lost</td>
<td>Holly Mistlebauer</td>
<td>Aged to Lost: Item Statuses can't.</td>
<td>Knowledge of what Item Status should be set to when aged to lost occurs, is billed, is paid, etc.</td>
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<tr>
<td>15min</td>
<td>Aged to Lost</td>
<td>Holly Mistlebauer</td>
<td>Aged to Lost: Additional Requirements</td>
<td>Knowledge that additional “Aged to Lost” requirements are correct.</td>
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<tr>
<td>10min</td>
<td>Call Number Sorting</td>
<td>Holly Mistlebauer</td>
<td>Sorting of Call Number in Fees/Fines History</td>
<td>The Call Number display feature for Fees/Fines has now been separated from the sorting of the Call Number in Fees/Fines History. The feature was highly ranked when both were together. Is the sorting still a high priority?</td>
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Meeting Outcomes

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Product Owner</th>
<th>Planned Release (if known)</th>
<th>Decision Reached</th>
<th>Comments</th>
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<tbody>
<tr>
<td>Fees/Fines</td>
<td>Holly Mistlebauer</td>
<td>MVP</td>
<td>Sorting of normalized call number on Fees/Fines History (aka Open/Closed/All Fees/Fines) will be removed from MVP (feature UXPROD-2128) given it is primarily used for edge cases. Instead, we will add a normal sort (if possible) for now. Post-MVP we will complete UXPROD-2128 or UXPROD-100/UXPROD-102 so that edge cases can be more easily researched.</td>
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Aged to Lost | Holly Mistlebauer | MVP
---|---|---
**Item Status will be “Aged to lost” when item is identified as aged to lost. TAMU will enter a manual lost fee after they determine the actual cost of the lost item, which will change the item status to “Declared lost.” After the lost item is paid the Item Status will be changed to “Lost and paid.” After the list item is replaced the Item Status will be changed to “Lost and replaced.”**

Aged to Lost | Holly Mistlebauer | MVP
---|---|---
If an aged to lost item is returned before the patron has paid the lost item fee, the lost item fee will automatically be waive (as will the lost item processing fee if a flag is set to do so). If an aged to lost item is returned after the patron has paid the lost item fee, the lost item fee will manually be refunded (as will the lost item processing fee if a flag is set to do so).

**Notes**

FOLIO RA SIG Meeting Notes 11-21-2019

Holly–Aged to lost–What should item status be set to?

--Aged to lost: Goes directly to billed for many institutions. When an item is aged to lost, the status of the item will be “Aged to lost.” And it stays “aged to lost” until it is “lost and paid” or “lost and replaced.” In the details for the “aged to lost,” we indicate that it is a system generated aged to lost.

--Declared lost: When an item is “declared lost,” meaning the patron has told a staff member they’ve lost the item. Then it becomes “declared lost” until it is “lost and paid” or “lost and replaced.” This would have a user’s login showing that it was a manually declared lost status.

--Lost and paid = when aged to lost item fee(s) paid by patron

--Lost and replaced = when aged to lost item replaced by patron

Some institutions age items to lost and bill right away. Others bill after a few weeks or whatever time they specify.

Is it aged to lost status regardless of whether it is billed or not?

After paid = lost and paid? For Duke and Chicago: Lost means Billed (no gap exists); TAMU (has a gap) ages to lost = lost system applied = then lost library applied (meaning billed).

At TAMU: When first aged to lost, status of item will be “Aged to lost.” After staff finds actual cost, they enter manual lost item and the system changes item to “declared lost.” Uses “billed” (meaning it has been sent to the bursar) in a note field for staff use.

We need to be able to apply a manual bill to an item with the status of Aged to lost and that it flips it to the declared lost status. But don’t bill it twice for institutions that bill automatically.

Holly–Additional requirements for aged to lost–clarification needed

--When patrons are notified of the Lost item fee, they will also be notified in the notice text of the replacement option if Replacement option = Yes. Holly would need to work with Darcy on how to implement the replacement text in notices. When patrons are notified of aged to lost, if loan policy says patrons are allowed to replace the item, then in the same notice patron is notified they can replace the item or pay for it? Lost item policy specifies whether an item could be replaced. Item type tells whether item is in the replacement category.

--Aged to lost item renewed: After an item ages to lost, do not allow the patron to renew the item, but do allow staff with special permission to do so. When item is renewed by staff, status would change to “Loaned” and number of renewals would be increased. The lost item fee will be waived. The Lost item processing fee will be waived.

--Aged to lost item returned: The item status will be changed to Available? Yes. The Lost item fee will be waived if the date is not beyond the “no refunds after” interval in the lost item fee policy. The lost item processing fee will be waived if lost item fee policy flag “if lost item returned, remove lost item processing fee” = “yes.” No automatic refunds at Chicago. Staff review to determine whether refunds would be issued.

Holly – Sorting call numbers – fine/fee history

Fee fine history and how to display the call number correctly and sorting the call number. Easier to display than sort correctly. Code not written yet for this. Sometimes no call number exists. All columns in fee/fine are sortable. Not needed for MVP. Let call number sort in the imperfect way that human readable call number will sort most of the time for call numbers that are different enough from each other. Would be close. Don’t let it sort at all? Call number normalization will work for all call number types. Let it sort on what displays to make it easier on developers (not MVP). Include normalized call number.