

Notice

Milwaukee County  
Federated Library System  
Library Directors Advisory Council

Regular Meeting  
Thursday, November 2, 2023  
10:00 AM – 12:00 PM

*This meeting will be held:*

Online at  
Meeting URL: [CLICK HERE](#)  
Meeting ID: 878 7080 9068  
Passcode: Djbm8LW8  
Telephone Passcode: 47632933

Agenda

*The LDAC reserves the right to take action on any of the items listed below.*

1. Call to order.
2. Welcome to new members.
3. Additional agenda items/adoption of agenda
4. Approval of minutes for the October 5, 2023 LDAC meeting

Action

Action

[Attachment A](#)

## Topics Requiring Action or Discussion.

5. Requirements for obtaining a library card in Milwaukee County.

[Attachment B](#)

6. [Proposed LDAC meeting schedule for 2024.](#)

- a. Host sites for April – October.
- b. Interest in a MCFLS Director retreat?

## Technology

7. Newsbank update.
8. Update on changes to bibliographic database, including authority control.

## Informational.

9. Strategic planning update.
10. Legislative update. Latest on library-related bills introduced.

## Additional Business

## Member Library Updates

### Sub-committee agendas and minutes

Circulation Services—Agenda and minutes available at <https://mcfls.libguides.com/circulation/meetings>

Youth Services—Agenda and minutes available at <https://mcfls.libguides.com/youth/meetings>

Young Adult Services—Agenda and minutes available at <https://mcfls.libguides.com/youth/yameetings>

Adult and Reference Services—Agenda and minutes available at <https://mcfls.libguides.com/adult/meetings>

### Next Meeting

Scheduled for Thursday, December 7 via Zoom online meeting software.

### Adjournment

Milwaukee County Federated Library System  
Library Directors Advisory Council  
Regular Monthly Meeting held Thursday, October 5<sup>th</sup>, 2023  
10:00am –12:00pm  
Via Zoom meeting software

Present: Tristan Boswell, Chair and South Milwaukee Public Library  
Amy Krahm, St. Francis Public Library  
Nyama Reed, Whitefish Bay Public Library  
Karli Pederson, Milwaukee Public Library  
Michael Koszalka, West Allis Public Library  
Rebecca Roepke, Cudahy Family Library  
Brian Van Klooster, Greendale Public Library  
Jill Lininger, Oak Creek Public Library  
Stephanie Lewin-Lane, Hales Corner Public Library  
Dana Andersen-Kopczyk, Brown Deer Public Library  
Marion Royal, Milwaukee Public Library  
Haley Samuelson, Shorewood Public Library  
Jennifer Einwalter, Greenfield Public Library

Excused: Pete Loeffel, Wauwatosa Public Library  
Jennifer Loeffel, Franklin Public Library  
Rhonda Gould, North Shore Library

MCFLS Staff: Steve Hesel, Director  
Jen Schmidt, Library Systems Administrator  
Brittney Hornung, Business Manager  
Belinda Lai, Library Systems Technician

Guests: Keri Whitmore  
Beth Henika, Milwaukee Public Library

Call to Order.

Chair Boswell called the regularly scheduled monthly meeting of the Milwaukee County Federated Library System Board of Trustees Library Directors Advisory Council to order at 10:01 a.m.

Additional Agenda Items/Adoption of Agenda.

Jill Lininger added general information on videotaping in library and a question on library cards given to patrons who own property but don't live in the municipality.

Director Hesel added an update for the All of Us grant project and a brief update on workforce development.

Amy Krahm motioned and Jill Lininger seconded the motion to adopt the additional agenda items and approve the agenda as presented. Unanimously approved.

Approval of Minutes for the September 7<sup>th</sup>, 2023 LDAC Meeting.

Chair Boswell referred to the minutes of the September 7<sup>th</sup>, 2023 meeting shown as Attachment A of the agenda packet. Stephanie Lewin-Lane motioned and Amy Krahn seconded the motion to approve the minutes as presented. Unanimously approved.

TOPICS REQUIRING ACTION OR DISCUSSION

2024 MCFLS Budget – Draft.

Director Heser referred to the 2024 MCFLS Budget shown as attachment B of the Agenda packet. Some highlights with the 2024 budget include: State aid increase by 10% which also results in a 10% increase in reciprocal borrowing in 2025. MCFLS will lead a migration to a new online catalog called Aspen Discovery. This will modernize resource and discovery sharing at an additional \$20,000 cost being covered by the system. Health insurance costs increased by 10% for the system which is on the lower end of increases compared to other systems. This will be monitored going into next year with a possible change if there is another significant increase. The system is investing in cloud infrastructure for patron telephone notifications through Shoutbomb which will save the system money.

Member costs that will be covered by the system in 2024 include Cataloging cost, County Cat and self-check costs, Patron Point marketing platform for Library newsletters, and Shout bomb text notifications. Amy Krahn asked if there were costs related to maintenance costs for self-checks and what they are so this can be shared with individual boards. Some electronic resources also being covered include transparent languages, gimlet, Gale courses, overdrive magazines, and literacy database costs. Director Heser discussed the idea to have MCFLS move towards paying for more infrastructure costs and having member libraries manage their own collections and cover collection costs such as Hoopla and Overdrive. Director Heser also shared charts depicting current costs and the overall savings of \$136,631. Karli Pederson asked if budgeted funds for items such as electronic resources or literacy resources were not utilized, can those funds be allocated to reducing other member costs. Amy Krahn asked if the county aid is comparable to what other systems receive. Milwaukee County does not receive as much funding as other county's because the State Statute does not fund cross county use costs because of the population size and county classification.

2024 MCFLS System Plan – Draft.

Director Heser shared the 2024 MCFLS System plan shown as attachment C of the Agenda packet and gave a quick summary of the plan. The system will be utilizing Strategic planning process this year to review upcoming contracts that expire in 2024 and focus on member support. The hope is to get this plan to the MCFLS Board by March 2024. The system is looking at more infrastructure support for member libraries, marketing campaigns through adult literacy and learning tools, Aspen catalog change and internet redundancy. MCFLS is moving more to the cloud for better back up options such as telephone notifications, email and Share point backups. Director Heser also shared collaboration projects that have taken place with other systems and plans for this next year.

TECHNOLOGY

Aspen Discovery – Update and Timeline for 2024 implementation.

Jen Schmidt shared an update on Aspen Discovery implementation and timeline shown as Attachment D of the agenda packet. MCFLS plans to go live with Aspen by May 2024. The current contract with Encore through June 2024 and the new Aspen Catalog will begin in May 2024. This allows for an overlap with

the catalogs so that staff will see a draft of the public catalog before it goes live. There has been multiple forms of training materials and formats to support different learning styles for member library staff. All of this information has been shared with individual committees and posted on Libguides. There will need to be designated staff for administrative accounts during this training process. Jen Schmidt shared an example of the Wisconsin Valley library system page and the different themes they have per member library. The decision needs to be made on whether we keep the unified catalog or if member libraries would like individual themes with the catalog. These different themes could also be used as library web pages if they do not have one yet. Jill Lininger suggested sticking with the system catalog instead of separate library catalogs and maintaining consistency for our patrons. It has always been a singular system catalog and would be less confusing to staff and patrons to keep everything together. Discussion ensued. If libraries wanted to use the individual themes, they would need to designate staff to maintain their pages because MCFLS would not be able to maintain these. If a library is interested in the individual theme please reach out to Jen by November. One of the bigger changes noted by the Database Maintenance committee is the record grouping where there are multiple formats for one title such as physical book, audio book, ebook, CD book, etc. making it a ferberized catalog display.

#### Changes to Interlibrary Loan Process for MCFLS Members.

Director Hesel introduced Beth Henika and Karli Pederson to discuss changes to Interlibrary Loan Process for MCFLS member libraries. Karli Pederson shared that the ILL services have been moved to the collections area and gave a brief overview of how this new process is going to benefit member libraries and also patrons. Beth Henika shared and reviewed the new request form that will be available through Jotform instead of the current PDF form which should make the process easier and better protect patron personal information. This does not change the ILL service, just a new procedure for the request form. Tristan Boswell asked if there was a way to track the 5 item limit with this process. Currently, South Milwaukee prints and maintains a copy of the request form to track. Karli Pederson shares that this will also be tracked through this ILL process but the Jotform should have a print option if libraries would want to still track this at the library. The ILL email address will be shared out as well if member libraries have questions or need any information.

#### INFORMATIONAL

##### Strategic planning update and timeline

Director Hesel shared an update on Strategic planning and the projected timeline shown as Attachment of the agenda packet. There is going to be a brief patron satisfaction survey about MCFLS going out in the next week. There will also be another survey for major stakeholders such as Board members, MCFLS staff, and member library staff to fill out. The in person Strategic Planning session is scheduled for January 18<sup>th</sup> 9:00am-3:00pm with provided lunch and snacks. Brian VanKlooster asked how this survey will be presented to the public, if it was an email blast to everyone or if it will be distributed in a different way. Director Hesel shared that it will be going out on Facebook ads, through social media and in the MCFLS newsletter. The initial thought was to capture data from as many people as possible whether it's a typical library user or non-user. Karli Pederson asked if there was a way to do the survey but not electronically for those that may not have access to electronic versions. Director Hesel will look into this option, currently it is only electronic.

#### Inclusive Services update

Director Heser shared an update on inclusive services that was discussed at the most recent committee meeting with Chantel Clark. Inclusive Services is looking into expansion of support for selection and purchases of new materials for Milwaukee County Correctional Services. Pete Loeffel has put together about \$2,000 worth of materials. MCFLS is looking to see how they can support purchases of those materials to support residents of Milwaukee County wherever they are. If there is a need for funding to purchase more materials, the system is looking into covering these costs. Inclusive Services is also looking at reaching out to member libraries regarding their need for help with the service guide and assessment. The next Inclusive Services committee meeting is November 9<sup>th</sup> and will be developing a plan to approach member libraries on how best to use the assessment guide. Director Heser also shared that members of the Inclusive Services committee will also serve on other MCFLS subcommittees.

#### ADDITIONAL AGENDA ITEMS

##### Videotaping in Libraries

Jill Lininger shared that there is a group coming into the library and videotaping and harassing patrons. There may be an online trend where people come into the library and try to provoke negative responses from librarians on video. Oak Creek does not currently have a videotaping policy and because it is a public building, patrons should be allowed to video tape. Amy Krahn shared that they developed a videotaping policy because of situations like this. Marion Royal shared that they also allow videotaping because it is a public space but when patrons break the code of conduct they receive a letter of banning to be able to not allow those patrons in that public space.

##### Patrons signing up for library cards but do not reside in the municipality

Oak Creek has recently experienced patrons signing up for library cards with their property they own but is not their pertinent residence. Do other libraries experience this and do they give out library cards to these patrons. Nyama Reed shared that they have previously said no to these patrons because it is not their legal residence. Director Heser is going to look into the language used in the member agreement and bring this discussion back for future LDAC discussion.

##### All of us grant update

Director Heser gave a brief update on the All of Us Grant technology mixer boxes. All items have been purchased and are waiting on a few last steps before these will officially become available to check out through the mixer program.

##### Workforce Development Update

Director Heser shared that there will be a survey going out to all member libraries to see which libraries have interest in the workforce development program and what each library would like them to do.

#### MEMBER LIBRARY UPDATES

None.

#### SUB-COMMITTEE AGENDAS AND MINUTES.

Circulation Services—Agenda and minutes available at <https://mcfls.libguides.com/circulation/meetings>

Youth Services—Agenda and minutes available at <https://mcfls.libguides.com/youth/meetings>

Young Adult Services—Agenda and minutes available at <https://mcfls.libguides.com/youth/yameetings>  
Adult and Reference Services—Agenda and minutes available at <https://mcfls.libguides.com/adult/meetings>

Next meeting

Scheduled for Thursday, November 2<sup>nd</sup>, 2023 at 10:00 am, via Zoom online meeting software

With no further business, Karli Pederson motioned and Amy Krahn seconded to adjourn the meeting at 12:01 pm. Unanimously approved.

Membership Agreement between the Milwaukee County Federated Library System  
and the

\_\_\_\_\_ Public Library

In order to furnish the residents in the Milwaukee County Federated Library System (MCFLS) the best possible access to library materials and services, and in compliance with Chapter 43 of the Wisconsin State Statutes, the \_\_\_\_\_ Public Library and the Milwaukee County Federated Library System enter into the following agreement:

As required by 43.24 (2) Wisconsin Statutes, MCFLS shall provide the following services to member libraries and their patrons:

1. Interlibrary loan of materials among all participating public libraries.
2. Backup reference and interlibrary loan services from MCFLS and resource library, including the development of and access to specialized collections.
3. Agreements with member libraries to provide, to any resident of Milwaukee County, the same library services, on the same terms, that are provided to the residents of the municipality that established the member library, except for the group programming preference and remote database access authorized under s. 43.15 (4) (c) 4.
4. Referral or routing of reference and interlibrary loan requests from libraries within MCFLS to libraries within and outside the system.
5. In-service training for participating public library personnel and trustees within MCFLS.
6. Rapid and regular delivery and communication systems for participating public libraries.
7. Professional consultant services to participating public libraries and counties.
8. Promotion and facilitation of library services to users with special needs.
9. Cooperation and continuous planning with other types of libraries in the system area which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.
10. Planning with DLTCL and participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources.
11. Other services as required by Chapter 43.24 (20)(i) of the Wisconsin Statutes.



To be eligible for MCFLS membership, and the services described above, participating libraries agree to meet the following requirements:

1. Be established under Chapter 43.
2. Be located in the MCFLS service area (Milwaukee County).
3. Be authorized by its municipal governing body to participate in MCFLS.
4. Agree to participate in MCFLS and its activities, to participate in interlibrary loan of materials with other MCFLS libraries and to provide, to any resident of the system area, the same library services, on the same terms, that are provided to the residents of the municipality that established the member library. This subdivision does not prohibit a member library from giving preference to its residents in library group programs if the library limits the number of persons who may participate in the group program, or from providing remote access to a library's electronic database only to its residents.
5. Employ a head librarian holding current public library certification from the Department of Public Instruction and whose employment requires that he or she be present in the library for at least 10 hours of each week the library is open to the public, less leave time.
6. Honor valid borrower cards from other MCFLS member libraries.
7. Loan materials to other MCFLS libraries through MCFLS interlibrary loan programs.
8. Accept the return of materials borrowed from other participating MCFLS libraries for pickup by MCFLS delivery service, and permit local materials to be returned to other participating system libraries.
9. Maintain and provide accurate service and financial records as required by the DLTCL.
10. Be open at least 20 hours each week or, if the library existed prior to June 3, 2006, at least the number of hours each week that the library was open to the public in 2005, whichever is fewer.
11. Annually spend at least \$2,500 on library materials.
12. Agree to other requirements of Chapter 43 as they pertain to MCFLS member libraries.

This agreement shall be in effect from the time it is signed by all parties, and is subject to amendments as may be mutually agreed upon. It shall continue in force unless terminated according to Wisconsin Statute 43.18.

\_\_\_\_\_  
Library Board President      Date

\_\_\_\_\_  
MCFLS Board President      Date

\_\_\_\_\_  
Library Director      Date

\_\_\_\_\_  
MCFLS System Director      Date

## C-01 NEW PATRON INPUT STANDARDS

You can create a new patron record in Sierra Circulation using the following commands. In Circulation Desk mode from the command menu, select **File > New Patron**. In some cases, you may be prompted to choose a new patron template--choose the template for the library you are standing in. The library of registration is all ready selected for the template you select (i.e., East Patron template will show a code of "g" EAST in the LIB OF REG field).

in Sierra Circulation using the following commands. In **Circulation Desk** mode from the command menu, select **File > New Patron**. In some cases, you may be prompted to choose a new patron template--choose the template for the library you are standing in. The library of registration is all ready selected for the template you select (i.e., **East Patron** template will show a code of "g" EAST in the LIB OF REG field).

After selecting your template, the field prompts occur in the following order, with input standards provided for each. In most cases you will simply see the prompts below without having to select a template.

**1. EXP DATE** (Expiration Date): Usually 2 years for most patrons.(temporary/fee card are usually 1 year). Businesses, Educator Cards, Schools, and Nursing Homes are 1 year.

**EXP DATE is MM-DD-YYYY. However, when typing in the year part, you will see the "20" for the first part of the year.**

Staff are to calculate the expiration date based on the last day of the month in which the registration occurs, plus the appropriate number of years. For example, a fee card registered on August 13, 2014 would expire on August 31, 2015. A regular, adult patron registering on September 5, 2016 would expire on September 30, 2018.

**2. GENDER:** As of March 25th, 2018 the GENDER field is **no longer used in Sierra**.

### 3. P TYPE (Patron Type)

Select a patron type numeric code based on the local policy and appropriate location designation for the patron being register. Every municipality has a unique range of patron type codes to use. For example, West Allis is 70-79, Oak Creek is 240-249. **This is an important field. The wrong code may impact the application of local circulation fine and loan period policies.**

SEE ALSO: Insert C-7 PATRON TYPES

**4. BIRTH DATE** (Birth Year): Enter the full birth date of the individual as **mm-dd-yyyy**. **Unlike the EXP DATE, staff need to enter in four digits for the birth year. For entities other than individuals, e.g. business cards, use 01-01-2000.**

### 5. RESIDENCE (PCODE 3 field as of 3/1/2023)

Enter the numeric agency code for the library which corresponds to the community of residence of the patron.

Patrons often think they live in one community when in fact they live in another. Please always double check this information with the patron. If the he/she is unsure concerning the community of residence, it may be helpful to ask where the patron pays property taxes, or where the patron votes, etc. **This is an important field. The wrong code selection or failure to fill this field in may impact the reciprocal borrowing payment received or paid by your library. REFER TO C-68 RESIDENCE - PATRON TYPE DISCREPANCIES.**

The **RESIDENCE** codes are as follows: 1= Milwaukee, 6= Brown Deer, 83= Cudahy, 10= Franklin, 16= Greendale, 14= Greenfield, 96= Hales Corners, 8= Bayside, Foxpoint, Glendale, River Hills, 24= Oak Creek, 40= St. Francis, 89= Shorewood, 12= South Milwaukee, 34= Wauwatosa, 36=West Allis, 93=Whitefish Bay, 20= West Milwaukee.

**Please Note: Only individuals residing in the above communities are eligible for MCFLS cards. Residents of communities outside of Milwaukee County may purchase a FEE CARD from some MCFLS member library locations.**

### 6. PICKUP LOC (replaces the RESIDENCE field as of 3/1/2023)

The PICKUP LOC is the patron field individuals may set as the hold pickup location. As of March 2023, our library system no longer needs to have this field match with the RESIDENCE field. Patrons may select any hold pickup location and that location does not need to match the municipality where they reside.

**IMPORTANT: Please use ONLY numbers for this field. Staff will see item locations mixed in with library locations but you should only enter in library location codes. Looking at the example below for Zablocki, we should not have any patron records with 19a, 19abc, etc. only 19 for Zablocki itself. This is a field patrons are able to change in their public CountyCat record.**

Code	Description
17ypb	King Branch Young Adult Paperbacks
17yse	King Branch Young Adult Series
19	Zablocki Branch
19a	Zablocki Branch Adult Nonfiction
19abc	Zablocki Branch Adult Book Club Kits
19ac	Zablocki Branch Adult Careers/Jobs
19acd	Zablocki Branch Adult Music CDs
19acw	



## 7. NSL DIVISIONS

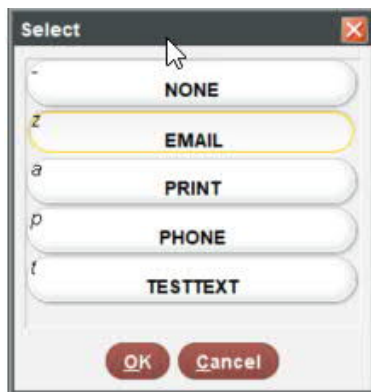
The **NSL DIVISIONS** field is only used for those patrons who live in municipalities served by the **North Shore Library**. These include only Bayside, Fox Point, Glendale and River Hills. If your patron's address includes one of these municipalities, choose the appropriate code, otherwise leave this field blank. This field is just as important as PTYPE for statistics purposes.

For more information on the NSL DIVISIONS field, see CountyCat Manual Insert C-87 - NSL DIVISIONS FIXED FIELD.

## 8. NOTICE PREF

The NOTICE PREF field is the fixed field which sets the delivery method for circulation notices. The options include Email, Telephone and Text. There is a '-' NONE field but staff are asked to not leave the code as - NONE because Sierra will still want to send a library notice even if it is set to none. The Sierra notice order is this: EMAIL, then finding no email, PHONE, then finding no phone number, then PAPER.

The **Text notice preference code of 't'** is separate from the Sierra notice types. It is tied to Shoutbomb where MCFLS gets its text notices from. The 't' code gets ignored by Sierra and is for use with Shoutbomb. Sierra will still work to generate its own notice in this order: EMAIL, PHONE, PAPER. That means, if a patron has this field set to 't' but has an email address, he/she will receive that type of Sierra notice as well as the text notice. Similarly, if a patron has this field set to 't' but has a phone in his/her record, he/she will receive a phone notification. If, on the rare occasion, a patron has neither of those fields, the patron with this preference of 't' will also get a paper circulation notice from Sierra. PLEASE READ THE SUMMARY OF NOTICES DELIVERY BASED ON NOTICE PREFERENCE. In order for a patron to get a text notice from Shoutbomb, this field must have a 't' AND the TEXT MESSAGE NUMBER field must be filled in.



For more information on NOTICE PREF and how it works with the Innovative software to send notices, see CountyCat Manual Insert C-65 - TELEFORMS (FORMERLY TELEPHONE NOTIFICATION SYSTEM) - Q and A.

Libraries are urged to let patrons know that print notices will take longer to get to the patron and also incur a cost for postage and forms for the library. Email is the recommended option for all notices since this method includes the name of the patron and title of the item. Text and email notices also provide much quicker delivery than the phone or print notices

## 9. PATRN NAME (Patron Name) (ALL CAPS) - CHANGES EFFECTIVE 9/18/2017:

Enter the patron name as follows: LAST NAME, [space] FIRST NAME [space] MIDDLE INITIAL. Please note a comma is included after the last name.

The name is necessary to display the name on the library card.

The comma is necessary to display the name normally on notices (example: JAMES A BROWN).

- Insert commas after the LAST NAME. For multiple surnames, surnames with spaces or hyphenated names, place all characters before the comma.
- Place name SUFFIXES (such as 'JR', 'SR' or 'III') after the MIDDLE INITIAL. The SUFFIX should be the last element of the name.
- No periods should be used in this field, but commas, single quotation marks and hyphens are acceptable. For example:

Examples:

BROWN, JAMES A

BROWN-JOHNSON, JAMES A

LOPEZ RAMIREZ, TERESA ANN

VANDEN BURGT, KELLY E

O'MEARA, CHRISTOPHER J

RICHARDSON, HENRY T JR

STEVENS, BRADLEY R III

Please note: In Sierra, duplicate checking for new patron records, is set to check the 'b' barcode, 'n' name, and 'u' school ID fields. In order for the system to put up a duplicate found message, the search has to be an exact match. Sierra cannot be set up for near matches.

## 10. ADDRESS: (ALL CAPS)

Enter all relevant address information. Use standard abbreviations where appropriate.

- If a patron has a PO BOX, the PO BOX is entered in the ADDRESS field, and the street address in ADDRESS2 field.



- Numbered streets should be entered as follows : 1111 N 64 ST
- If a nine digit zip code is available, enter as follows: 53222-1111
- If the patron has an apartment number, you may use the pound symbol (#) such as #7 or the abbreviation APT

**Cases when ADDRESS1 and ADDRESS2 are needed:**

**PO BOX:** Any patron having a PO BOX should have that information in ADDRESS1 and the address for the actual residence in ADDRESS2. The PO BOX information should be entered in like this: PO BOX. Please enter it in all capital letters with no periods (Do not enter it as follows: P.O. Box).

**TEACHER CARD:** Libraries offering Teacher Cards may need the ADDRESS2 field. Here, the ADDRESS1 field is for the school's address and the ADDRESS2 field is for the teacher's home address.

## 11. TELEPHONE:

Enter the telephone number, including area code NOT IN PARENTHESES. Insert [-] after first three digit of local telephone number. For example: 414 286-5555. Do you see the one space and the dash?

If a patron is going to sign up for text notices starting in April 2020, and this is the person's cell phone, you should keep the format here as it is spelled out, xxx xxx-xxxx, but you will need to enter in the cell phone number AGAIN in the new TEXT MESSAGE NUMBER and there it is with no spaces or dashes such as 4142865555!

For patrons not wishing to receive Telephone Notification calls (TNS) or any notice from the library, staff may want to insert a 'z' in the NOTICE PREF field and then use the circadm@mcfls.org for the email address.

**NOTE: Please make sure there are no words, commas or MULTIPLE PHONE NUMBERS in the TELEPHONE1 field. See the below two screenshots for examples of things not to put into the TELEPHONE field. If you see the word 'unlisted' or 'disconnected' in the telephone field, it is best to put a 't' for CHECK PHONE, in the PMESSAGE field and remove the telephone field altogether.**

OR . . . .

In April 2020, MCFLS will enable the TEXT MESSAGE NUMBER field and NOTICE PREF code of 't' for text. If, a patron's TELEPHONE number is the person's cell phone and he/she wants text notices, the cell phone number needs to ALSO BE ENTERED into the TEXT MESSAGE NUMBER field regardless of it being in the TELEPHONE field.

## 12. ADDRESS2: (ALL CAPS) Same standards as ADDRESS field.

Cases when the ADDRESS2 is needed with ADDRESS1:

**PO BOX:** Any patron having a PO BOX should have that information in ADDRESS1 and the address for the actual residence in ADDRESS2. The PO BOX information should be entered in like this: PO BOX. Please enter it in all captial letters with no periods (Do not enter it as follows: P.O. Box).

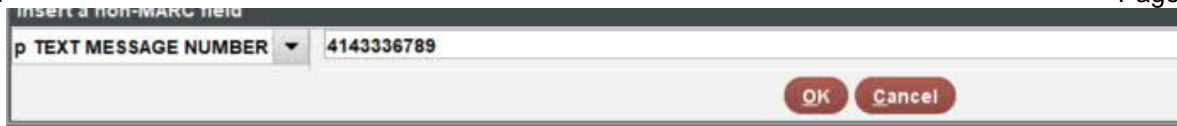
**TEACHER CARD:** Libraries offering Teacher Cards may need the ADDRESS2 field. Here, the ADDRESS1 field is for the school's address and the ADDRESS2 field is for the teacher's home address.

## 13. TEXT MESSAGE NUMBER (Formerly TELEPHONE2)

**Updated 3/10/2020:** MCFLS received LDAC approval in January 2020 to repurpose the TELEPHONE2 field for use with the company Shoutbomb to identify a new method for signing up patrons for text notifications. The field will go live in April 2020. At that time MCFLS member libraries will see not only the variable 'p' field in Sierra patron records but also, this field will also appear on the CountyCat patron record allowing patrons to enter in their number on their own.

With the NOTICE PREF as 't' and a cell phone number (no spaces or dashes) entered into this field, MCFLS will communicate with Shoutbomb to sign up the patron for text notices. If a patron simply wants his/her cell phone in this field, that is fine, but the NOTICE PREF code must be set to 't' if he/she also wants text notifications. See the proper formatting below: See also: the SUMMARY OF SIERRA NOTICES page for details because this type of notice is in addition to email, phone or paper notices from Sierra.

**Please enter in the cell phone or text message number without spaces or dashes.**

A screenshot of a web form. At the top, it says "Insert a non-MARC field". Below that is a dropdown menu with "p TEXT MESSAGE NUMBER" selected. To the right of the dropdown is a text input field containing the number "4143336789". At the bottom right of the form are two red buttons labeled "OK" and "Cancel".

#### 14. EMAIL ADDR (Email Address)

This field is used for patrons wishing to receive hold or overdue notifications via email. The notice preference may be either 'z' for only email or 't' for text notice from Shoutbomb and email from Sierra. To add multiple email addresses, use ONE EMAIL ADDR field and join the addresses together, separated by one comma and no spaces:

**user@mail.com,user@anotheraddress.com**

#### 15. SCHOOL/EMP School/Employer (ALL CAPS) [OPTIONAL]

This is an optional field. It is used to enter either the complete name of a patron's school or employer.

#### 16. SS NUMBER (Social Security Number) [OBSOLETE AS OF 08/12/14]:

All social security numbers have been removed from the database and the field itself removed as of 08/12/14.

#### 17. DRIVERS LIC/ID NO (Driver's license or Identification Number) [OBSOLETE AS OF 01/21/18]

All driver's license numbers have been removed from the database as of 01/21/18.

#### 18. PARENT NAME (ALL CAPS) [OPTIONAL]:

This is an optional field. It is used to store the name of the patron's parent (used for child patron records).

Enter the parent name using the same entry standards as the patron name: LAST NAME(S), FIRST NAME MIDDLE INITIAL.

#### 19. PARENT ID [OPTIONAL]:

This is an optional field. It is used to keep an identification number for the patron's parent (used for child patron records).

#### 20. CONTACT OK [OPTIONAL]:

Used to indicate the patron has given their assent to contact from libraries listed in the field. The library names should be entered as follows to help retrieve these records with Create Lists:

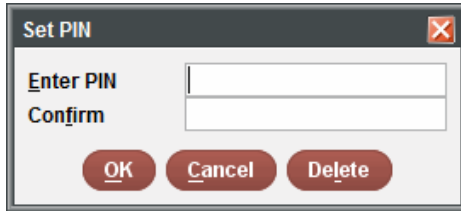
Brown Deer  
Cudahy  
Franklin  
Greendale  
Greenfield  
Hales Corners  
Milwaukee  
North Shore  
Oak Creek  
St. Francis  
Shorewood  
South Milwaukee  
Wauwatosa  
West Allis  
Whitefish Bay

#### 21. PATRON PIN (Patron Personal Identification Number)

This is a variable length field. When you enter the patron's personal identification number (PIN)--the PIN



must be entered twice in the popup box that appears to confirm the PIN has been entered correctly. The information is masked so staff may want to relay to patrons that staff cannot view the information and that CountyCat has a prompt on the login page to reset one's PIN.



- **DEFAULT:** The patron's full birth date, represented as a string of 8 numbers, with no dashes, spaces or any separators. For example, a patron with a birth date of April 30th, 1992 would have a default PIN of 04301992.
- **[OPTIONAL]** If your library has purchased a USB numeric key pad, the PIN may be entered by the patron themselves. Staff will offer the patron the key pad and prompt them to enter in their PIN and confirm the number at the appropriate time--the numbers do not appear as viewable within Sierra Circulation.

## 22. P BARCODE: (Patron Barcode)

Key or wand the barcode which is being assigned to the patron. If your location wands a barcode and an extra, ending space is added to the field as a result, please reach out the LSA at MCFLS to reprogram your barcode scanner.

Important: Please do NOT put characters in this field. Also, the patron record should not have multiple P BARCODES. Since it is used for accessing e-resource and CountyCat, systems cannot recognize which current barcode is correct when there are multiple instances.

## 23. LBARCODE (Last or Lost Barcode)

If a patron loses their library card or needs their library card replaced with a new number, record the old barcode number in the LBARCODE field followed by a short description and the initials of the staff member and the date. The best practice for this field, is to have only one instance of the L BARCODE. All staff should note that MCFLS runs and distributes an annual report of patron records having more than one L BARCODE each year right before the May Circ Services meeting. This is to assist any interested locations in doing clean up of the field.

- **555666777888 lost card @34 8/24/14 sh**

**OverDrive/Libby and L BARCODE:** As patrons get a new library card and barcode, the L BARCODE can hold the older barcode. For OverDrive and Libby, the L BARCODE will still be tied to the patron so he/she will not lose their holds. Once the patron has a new barcode and that barcode is in the patron record as a P BARCODE, OverDrive should recognize the person and retain the hold activity because of MCFLS's two barcode fields. Please see the Help for Libby tab and look for more information on Merging Patron Barcodes.

## 24. PERMISSIONS [OPTIONAL]

This is an optional field that was locally created by MCFLS (with Innovative's help) in May 2009. The field may be used by libraries to record one or more types of permissions tied to a patron account. Important, please create separate PERMISSION fields in a patron record for different types of permissions. Types of permission fields may be tied to these things:

1. **Hold Pickup Permission.** (As of May 2023, the content for this permission field applies for all libraries)
2. **R-Rated Movie Checkout Permission.**

## FORMAT FOR THE HOLD PICKUP PERMISSION :



1. The name of the person allowed to collect and checkout hold materials for the patron,
2. The @ symbol which tells which library the patron asked for the permission initially,
3. The location of the library (numeric code) where the patron asked for this request, and
4. The date and staff initials of the first person who took the request and entered it into Sierra.

**For example: MCFLSTON, MAISY HAS PERMISSION TO PICKUP HOLDS FOR PATRON. @13 5/23/23 JLS.**

**At the May 2023 meeting**, LDAC approved a system-wide change whereby information in the PERMISSION field is recognized and honored by all member libraries not just the patron's home library. This is true unless there are specific library limitations noted in the given patron record.

Library staff will work to consolidate multiple PERMISSION fields so that there is only one instance of that field per patron record. Libraries will further work to move information about permissions out of one or more staff NOTE fields and into the PERMISSION field where the information is intended. Below is an example of the correct format for the PERMISSION field.

NOTE: Some libraries may still require the patron completes a paper form that is kept on file at that library. Other libraries may require a verbal agreement by the patron to permit someone else to pickup their hold materials. In both cases, the library should also create a PERMISSION field for the given patron so that the information about a person able to collect and check out holds can be seen and identified at other libraries as well.

***DONE! This completes the prompts for creating a new patron record in Sierra Circ.***

## INFORMATION ON EDITING PATRON RECORDS

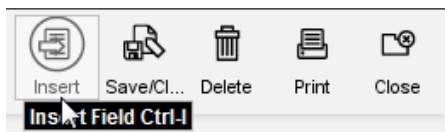
If you would like to:

### Change the value of a FIXED LENGTH FIELD (e.g., P TYPE, PMESSAGE)

- Double click on the white space for the given fixed field. Then select the appropriate code.
- See the attachment below which lists all of the Innovative fixed fields for patron records.

### Add in another VARIABLE LENGTH FIELD (e.g., MESSAGE, NOTE, etc).

- Click the **INSERT** button found at the top from the Sierra toolbar.
- Select the appropriate field from the drop down menu. Click OK
- See the attachment below which lists all of the Innovative variable fields for patron records.



 Patron Record Fixed Fields

 Patron Record Variable Fields

 LDAC May 4 Mtg Hold Permissions