



Network News

December 2021

Privacy Matters: Collecting Only Necessary Information about Patrons

By Kathy Lussier

At the FY21 SAILS Annual Meeting, privacy consultant Becky Yoose of LDH Consulting Services made the apt comparison between library patron data and glitter.

Just like glitter, data has a way of spreading to various nooks and crannies. Data is also very difficult to clean up once it is collected. As SAILS staff and the privacy audit task force have reviewed data practices, this comparison resonates. Reports with personal identifiable information get saved to PCs and to Google Drive. This data is often sent in email, landing in several Inboxes and Sent folders that may or may not be cleaned up.

“What is the first rule of glitter?”, Yoose asked at the Annual Meeting. “Do not use glitter.”

Similarly, one of the first questions we raise in a privacy audit is whether the personal information we collect on users is necessary for library operations. If libraries don’t collect unnecessary information, we don’t need to worry about cleaning it up when we’re done with it.

In reviewing data SAILS libraries collect on patrons, the Task Force immediately focused on the data collected in User Category 1 of the patron record. Unlike other user categories, each SAILS public library can choose what data to collect in User Category 1.

For many libraries, these codes may have been in place back in the SEAL and ABLE days before the SAILS network was formed. Now is a great time to consider whether your library really needs all of the information collected here or if you can reduce the amount of data you are collecting.

When user categories become too specific, we also end up with some categories that have been applied to just five or six patrons. This becomes problematic when those user categories then appear in statistical reports because it’s possible to narrow the identification of the person responsible for that statistic to just a handful of patrons.

Some of the information collected in this user category that libraries might want to reconsider include **gender**, **primary language**, and **census tracts / voting precincts**. Simplifying user categories has multiple advantages aside from user privacy issues. It’s a great opportunity to clean up the database and can make training easier for new circ staff who will no longer need to interpret cryptic codes.

At this time, 17 public libraries in SAILS no longer collect gender information in user category 1. Most of these libraries just made this change in the past few years as they considered how to represent patrons who do not identify as male or female. Rather than creating new categories to represent the broad spectrum of gender identity, these libraries determined that collecting gender information was not necessary to their operations. The American Library Association has published an informative brochure at https://bit.ly/ala_trans_inclusive that discusses points to consider when deciding whether or not to collect gender information.

In place of the old user categories, options for the use of this field include 1) tracking just juvenile, ya, adult and senior in user category 1 2) tracking whether or not the patron is a resident of your town (this information is also tracked in user category 2 or 3) not using this category at all.

If your library decides to change what information is collected in user category 1, SAILS staff can do the heavy lifting. Send an email to support@sailsinc.org, and support staff will update your patrons in batch to the new user categories. If your library decides to go with age-based user categories, support staff can also run a weekly process that will automatically move patrons to a new user category when they reach a certain age. We can do the same to update your user profiles.

If you have any questions or have other ideas as to where libraries can reduce the collection of unnecessary user information, feel free to send an email to support@sailsinc.org.

Fixing SMS Errors

Now that we're able to more easily see the errors that are happening with the SMS notices, we now have to know how to handle them. Though it is up to your library to come up with a method, we thought we'd share a few ideas to help you out.



Someone in the library should be receiving the ""SMS Errors" was edited recently" emails. It should currently be going to the circ contact we have for your library. To open the spreadsheet from the email, you don't need to request access to it. If you get prompted to request access, it's because you're clicking on the link to view the changes. There's a 2nd link on the email that says to "Open the current version of the Google Document "SMS Errors": Click here". If you click on that link, you won't need any special access to view the spreadsheet.

Don't worry about clearing out the fixed errors. These will get pushed to the bottom and we'll remove them periodically. These are the errors you will see and what they mean and how to respond.

ERROR - The destination number you are trying to reach is blocked from receiving this message; e.g., due to blacklisting

recommended action: the patron can get in touch with their carrier to make sure our service isn't being blocked. The number our text messages come from is 888-418-6527 and it displays as "Sails Sms Number". In the meantime, see if they'd rather receive email or voice notification. If you can't get an answer right away, and they have an email in their account, switch them to email. If they do not have email, switch them to voice.

ERROR - The destination number is unable to receive this message most likely because the destination number is a landline.

recommended action: contact the patron and see if they'd rather receive email or voice notification. If you can't get an answer right away, and they have an email in their account, switch them to email. If they do not have email, switch them to voice.

ERROR - The destination handset you are trying to reach is switched off or otherwise unavailable.

recommended action: if it's an available hold and you're not running text reminder notices (check [here](https://docs.google.com/spreadsheets/d/15pQizX17khK8qtfyZOH2RqcIJrjud7HxUXUOdyqGzNo/eusp=sharing)), you should contact the patron and let them know the hold is available and the text didn't get through to them. If the number comes up in error a second time, contact the patron and see if they'd rather receive email or voice notification.

ERROR - The destination number you are trying to reach is unknown and may no longer exist.

recommended action: contact the patron and see if they'd rather receive email or voice notification. If you can't get an answer right away, and they have an email in their account, switch them to email. If they do not have email, switch them to voice.

ERR_PH_NUM - The destination number was not formatted properly for the region code US, for example the area code was not recognized as valid.

recommended action: view the patron record and fix the phone number. If the fix isn't obvious, contact the patron and see if you can get a confirmed number. If you can't get an answer right away, and they have an email in their account, switch them to email. If they do not have email, switch them to voice.

Let us (support@sailsinc.org) know if there's anything that would make it easier for you to manage notifications. If we can do something to help, we will be more than happy to!

Circulation Tip of the Month

Overriding Holds at Checkout

Under SAILS policies, you may check out an item to a patron even if it is flagged to fill a hold. Please do not cancel the hold itself. You can proceed with the checkout and allow the hold to remain in the system for the next available copy.

Holds Block Override

Item has holds

This item is now being held for
333 Tony

Address

B HANDEL
32040000251056
Handel
Hogwood, Christopher.

Copy: 1
BOOK (BIOG)

Hold block override:

Override & Checkout Item Override Checkout Item & Cancel Hold Do Not Checkout Item

Handling Lost Items

This topic hasn't been reviewed in quite some time and since we had a question or two this past month, we thought it would be good to remind everyone of how to process lost items. There are 2 very different situations for how items are marked lost, and each is done a different way.

1. Probably the most common situation is an item is very overdue and our weekly assumed lost process marked these as lost-assumed and billed the patron.
 - a. If the item is returned, when you check it in,
 - i. the inactive checkout will come off the patron's record...
 - ii. the lost bill will be removed from the patron's record
 - iii. an overdue bill will be put on the patron's record
 - iv. a processing fee will remain on the patron's record.
 - b. If the item is returned and the lost bill was paid,
 - i. the inactive checkout will come off the patron's record
 - ii. the patron will not get refunded by the system.
 - iii. an overdue fine will be created on the patron's record.
 - c. If the item is returned and you can't find the item in the system, the patron's bill was probably forgiven and the item was removed from the system,
2. The other situation is when a patron comes up to the desk and reports an item they have checked out is lost. They've looked and can't find it.
 - a. The item will be overdue or checked out.
 - b. It will not have a status of assumed lost
 - c. Do NOT use the BILL A USER or PAY A BILL wizard. Use the MARK ITEM LOST wizard.
 - i. The patron will be billed for the replacement cost of the item.
 - ii. The item will be shadowed with the current location of LOST.
 - iii. If the patron is paying for the item at the same time you have the option to
 - iv. accept payment.

Please view the SAILS website for further details on handling payments for lost bills and preferred ways libraries would like their materials dealt with.
<https://www.sailsinc.org/circulation-desktop/lostclaimed-returned/>
 And of course, let us know if you have any questions! (support@sailsinc.org)



Multiple Holds on the Same Title Available for Some Profiles

As a reminder, some profiles are able to place multiple holds on a title without the need to provide an override code. The ability to place multiple holds has been available in the SAILS system since 2020.

This feature is useful for users who need to place holds for a book group, but can also be confusing because there is no warning letting the user know they may already have a hold on the title. Users who can place multiple holds without an override code are those with a profile of STAFF, FACULTY, TEACHER or CORRECTION.

The feature is implemented in two places:

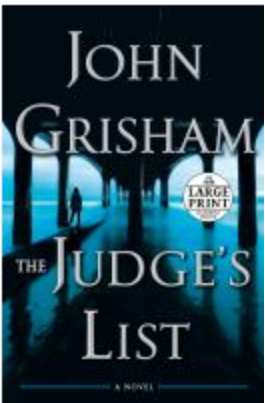
- In Workflows, staff are able to place a hold on behalf of patrons with these profiles without being required to enter an override password for each subsequent hold.
- Users with these profiles who log into Enterprise are able to place multiple holds on a title even if they already have a hold on the title. Enterprise will not provide a warning to these users that they have already placed a hold on the title.

The FACULTY profile is one that is used by teachers from school or academic libraries that are members of SAILS. The TEACHER profile is one used in some public libraries to provide special privileges to teachers using their library.

Anyone with questions about this feature should contact SAILS at support@sailsinc.org.

Top titles looked at in Enterprise for November

Radiohead (video format) - 124
The family naomi 118
TITLE=judge's list = AUTHOR Grisham, John 79
TITLE=murder list| =AUTHOR=Ryan, Hank Phillippi 70
TITLE=stranger in the lifeboat| =AUTHOR=Albom, Mitch 53
TITLE:"Never"| =AUTHOR:"Follett, Ken" 44
TITLE=Christmas Bookshop| =AUTHOR=Colgan, Jenny 43
Want to find these yourself? Check out all the [Enterprise stats](#) in Google Data Studio



Digital Commonwealth Presentation

by Chelsea Fernandes

As a follow-up to the Digital History Roundtable, we have invited Kate Boylan, President of the Board of Directors at the Digital Commonwealth to come and speak to our membership. This event will be held on January 11, 2022 via Zoom. We hope this will be an opportunity for you to see all that the Digital Commonwealth has to offer as well as ask questions and get connected. You can register here for this event:

<https://www.eventkeeper.com/code/ekform.cfm?curOrg=SAILS&curID=545856&CFID=32475636&CFTOKEN=585266bd7d803901-A68CB67A-D4AE-528A-5350E190E3560A46>

Any questions can be directed to Chelsea Fernandes at cfernandes@sailsinc.org.

Highlights of the November Board Meeting

- The Board voted to approve a Hybrid Work Policy for the SAILS office. The office has been open full time since August. SAILS staff have the option to periodically work remotely. All calls will automatically be forwarded to their phones on remote work days. The policy requires that staff continue to meet SAILS Guaranteed Service Levels when working remotely.
- The Board approved a revised Conflict of Interest form submitted by the SAILS Executive Director.
- The Executive Director reported that the first meeting date for the Electronic Resources Advisory Committee has been delayed because the committee chair has left the network. The Board agreed that the committee can be chaired by somebody who is not a library director. Anyone interested in serving on the committee should contact Kathy Lussier at klussier@sailsinc.org.
- Libby O'Neill was appointed to serve on the SAILS Nominating Committee. The committee had a vacancy due to the departure of Manny Leite, who will be taking a new position in Tennessee.

- The Board approved written testimony submitted to the Joint Committee on Tourism Arts and Cultural Development on a proposed bill that would require publishers to set reasonable terms when licensing e-books and digital audiobooks to libraries. The testimony was shared with SAILS directors to add their electronic signatures to the testimony. The testimony was ultimately signed by 39 directors from SAILS academic, public and K-12 school libraries. Thank you to everyone who added their signatures!
- The Board discussed the possibility of holding a Legislative Breakfast this year. A breakfast was not held last year due to COVID-19. The Legislative Breakfast committee has since met to discuss the breakfast and is looking for libraries to host small legislative coffees.



*The SAILS office will be closing at noon on December 23rd for Christmas eve
and will be closed all day on Friday, December 24th*

UPCOMING EVENTS:

Barcode Order Placed	December 8, 2021
Informal Director's Chat	December 14, 2021 10 - 11 AM
Digital Commonwealth Guest Presentation	January 11, 2022 10 - 11 AM
Martin Luther King Jr. Day	January 17, 2022 SAILS Office Closed
SAILS Membership Meeting	January 19, 2022 10 - 12PM

NOVEMBER STATISTICS

Circulation (no Overdrive)
Total Items Circulated: 251,363
Items Loaned between SAILS
Libraries: 54,443

OverDrive Circulation to SAILS patrons
Ebook: 30,683
Audio Book: 18,173
Video: 58
Magazines: 2,424

Database Size
Titles: 1,071,618
Items: 3,198,392
Total Patrons: 368,262



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