MORE Operations Committee meeting information
February 8, 2022

2. Discussion and possible action on CVTC patron records in MORE

At the March Directors Council meeting, I'll propose an amendment to the [MORE Patron Registration Policy](), specifically:

"General notes:

- MORE-member library staff verify an individual's identity and residence when registering them as a new patron
- Local library policy dictates the methods libraries may use to verify identity and place of residence
- Individuals may have a single MORE library record**, except CVTC affiliates may have both a CVTC patron record and a record created by a MORE-member public library.**"

CVTC patron record goals

1. Load CVTC patron data automatically and frequently

2. Upon loading records, allow CVTC patrons to access CVTC and MORE electronic resources, place holds on CVTC and MORE materials, and check out materials at CVTC

3. Upon initial load, disallow checkouts on CVTC patron accounts at other MORE-member libraries until library staff adjust the patron record

4. Make the procedure easy for library staff to understand, follow, and explain

Limitations

- It is not possible to automatically load ACT150 LOC data into patron records
- It is not possible to accurately determine duplication for automatic patron loads

Proposed procedure

CVTC patron records will be automatically loaded into the MORE patron database each week from the college's records

For each week's updated patron load:

- Existing records for continuing CVTC patrons will remain unchanged
- CVTC patron records for those who are no longer affiliated with CVTC, owe no money, and have no materials checked out will be deleted

- CVTC patron records for those who are no longer affiliated with CVTC but owe money, and/or have materials checked out will be retained. When possible, these accounts will be merged with existing MORE accounts.
- New CVTC patron records will be loaded with a distinct PTYPE and no ACT150 LOC value

CVTC patron records will include the data required in the [MORE Patron Registration Policy](#) except the ACT150 LOC fixed-field value, and will have a distinct PTYPE and a patron message with staff instructions.

Individuals may have both a CVTC patron record and a patron record from a MORE-member public library. Either account will work to borrow materials from MORE-member libraries and access online resources provided by MORE.

Only CVTC patron accounts may access certain resources from CVTC.

Upon loading, each CVTC patron record will have a blank ACT150 LOC field, and will have a "CVTC Only" patron type (PTYPE) that will prevent the CVTC patron from borrowing materials from MORE-member libraries. If the CVTC patron does want to check materials out from MORE-member public libraries, the patron must their place of residence with a MORE-member library staff person. Then, staff must:

1. Enter an ACT150 LOC value matching the patron's place of residence
2. Change the patron type from "CVTC Only" to "CVTC MORE Verified" (or similar)
3. Remove the patron message with staff instructions

The CVTC patron can then use their CVTC record to borrow materials from MORE-member libraries and access functions of the MORE Online Catalog, including placing holds.

3. Discussion and possible action on training for new employees, task sheets, quizzes, etc.
Staff training resources shared by MORE Operations Committee members

- Service Desk Procedures
  https://drive.google.com/file/d/1ENOl0cQ0Hkchq88ZHCbKWWJoZycPoFSA/view?usp=sharing
- Library Aide Procedures
  https://drive.google.com/file/d/1hawFYQdDxRY1F-VibLDJXCZwoe1ppDiB/view?usp=sharing
- Aide Training Checklist
  https://drive.google.com/file/d/1pCUgkO9-V7_I_2mKjzaaTSridBk_NBVw/view?usp=sharing
- LA Training Checklist
  https://drive.google.com/file/d/1S7v7xIeGsG7ycuErhRvzcYT-DXBivhm0/view?usp=sharing
- Shelving Quiz
  https://drive.google.com/file/d/1iup42SWHwBEIQOHQCwcl6kfi8CvPV2-L/view?usp=sharing
- Page Skills Test
  https://drive.google.com/file/d/1qonUaTPwulbzSgUUNxTdzW_6TWZPoUe7/view?usp=sharing