What do we do?

- Summer database cleanup includes:
  - Deleting expired patron records
  - Checking for on-the-fly patron records
  - Checking patron notes and messages
  - Verifying affiliate patron records

- Also, checking item records for in transit and on-the-fly items
Expired Patrons

- Goal is to delete patron records that have expired for at least one and one half years
  - For example, Summer of 2015 we delete records that expire December 31, 2013 or before.
  - Records with outstanding holds, fines or items charged can not be deleted without modifying the records first.
This search yielded over 8500 patron records. I generally sort them by patron type to see if there are any internal patrons that are still needed and should be updated. I also look for patrons who owe a small amount of fines that may need to be waived. On the first delete, 8371 patron records were removed. A list was exported so that the remaining 223 records can be evaluated and possibly deleted. Of these, an additional 83 had fines under $5 (some dating back to 1998) that were waived so that the patron records could be deleted. There are 135 records remaining – of these 25 have 31 law books checked out that did not get billed (law) so they can not be deleted. I recommend that we post these items as lost so they can be removed from the patron records and then those patron records can be deleted. We checked for the remaining fines in ISIS and determined that only 8 still show as owing in ISIS. The remaining fines and charges have been written off or the patron does not exist in ISIS. We will need to decide what to do with these records. (97 patrons, owing $8754.20 with 127 items checked out, including one deceased with $1888 owed for laptop)
There are a few records in the system right now for Springdale High School patrons who have applications on file that were paid, but are incomplete. We left the record “on-the-fly” until they have all of the needed information.

On-The-Fly Patron Records

- Search for any records that have the code “f” in the patron pmessage field.
- Sometimes records are created at the desk and then when the application is processed another record is created. Or, an “otf” record is overlaid by the system but the code remains.
What next?

- Patron messages and notes

Search for messages $\geq 0$ and it will pull all patron records with messages. Sort by message and patron name. Then we go through and clean up and delete messages that are not on the standardized list. For example:
Check address is a message that is not needed because we have a pcode that gives that message. We had 12 of these patron record messages.
Approximately 240 records have an ID Exception used. This is the most common message that is added to the patron record. We now have a message that will allow us to consistently enter the ID Exception used message.
Other Uses

- Sometimes a message is used in place of a friendly email reminder:

  REMIND PATRON TO REMOVE BOOKMARKS FROM BOOKS BEFORE RETURNING THEM

  MAPLE ST
  PRAIRE GROVE AR

We should email this patron after books were returned and simply remind her that we would prefer that she remove the bookmarks (probably a bunch of yellow post it note type stickers) before the items are returned. The same thing would be done with books that have pencil marks and we have to spend time erasing them.
Patron notes

- Internal use - Cannot be seen by the patron
- Mostly manually entered
  - System generated
    - claims returned and FERPA
  - Patron type clarification, such as:
    - Adjunct faculty or staff
    - High school designation
    - Cooperative Extension
    - ARK-Link (with OCLC code)

There are three times as many records with notes as there are with messages. Some of these are system generated, like the claims returned notes and the FERPA notations. Many are clarification of patron statuses for patrons that are manually entered.
Example:
Standardization

- We do have a standardized list of approved messages and notes that may be used.
- Please ask if you would like a copy of this list that includes our policies regarding notes and messages.
Spring International patrons who have enrolled as students still have the SI note field, which is deleted. SI faculty / staff are verified and deleted as needed. There are 690 patron records for “Circ only” which have been imported from the ISIS Affiliate database. Generally, these are Spring International patrons and the expiration dates have not been entered accurately which causes problems when there are overdue fines and outstanding materials as the students have already left and do not have forwarding addresses. There are about 90 patron records imported as Retirees by mistake that could not be deleted because they have outstanding fines or items. There are currently 28 Spring International Faculty / Staff in our system.

Crystal Bridges provided a list of patrons that could be deleted and I deleted those that did not have fines or materials checked out. There are still 63 CB patron records that were sent to the CB librarian to verify.
On the fly Item Records

- Create a list of items that have an “f” in the imessage field.
- Search for items
- Clean up records, or send to cataloging

The imessage is an internal message and does not display to the public, so it isn’t a critical element. I started this project with 1566 records. Many are in storage, so it is difficult to retrieve and fix those records. I generally ask Kelvin to retrieve a few at a time as he is able so I can fix them. There were approximately 275 map records which I immediately removed from my list. I also removed all microform records, usdocs, govrf and law. I was left with about 200 records to fix, including storage. We started retrieving the items and fixing the records. Branch libraries and PAM were sent their list of items (FAL and Physics only). All but 24 items were found and fixed. The remaining items will be put on search.
We had several unbound periodicals that were on the fly, but the catalog was showing that these issues had been bound. We found the items within the bound record so we deleted these item records since they are not circulating as individual items.
We started this list with 334 items. Many of them were in transit to storage from either ILL or Circulation. I had Kelvin verify these were in storage so they could be cleared. There were almost 100 and all of them were located. The majority had been put in transit by ILL staff. I searched in Law for most of their in-transit items and left the list so they could search for the remaining items (if they wanted). I was told they would prefer to not have items in transit, but this is not a viable option for us. The branch locations were able to locate most of their items. The items that were not found were put on search.

In-transit Item records

- Created a list of in-transit items (status=t)
- Sent lists of items belong to the branches to the supervisor in that area.
- Searched stacks for items in transit to main
Finished!

- These clean up projects are done every summer and help to maintain the integrity of the item and patron databases.

- Any Comments or Questions?