

## CARL Conversations: August 11, 2021

### Topic: Teacher Cards

#### Question and Answer Session

1. Why is the address in the teacher account the same as the patron's personal address? Shouldn't the teacher address be for the school they teach at?

No. This was how it was done in Sierra as well. The idea behind this is that the individual patron is responsible for any damage and or bills made to materials. The address in the teacher account is where any bills will get sent, so it makes sense to have the personal address because we don't want bills and notices getting sent to the school.

2. What is the procedure when a teacher changes home agency?

If a patron with a Teacher Card changes Home Agencies, the new library should start with a new Teacher Card form, after they have updated their personal account.

3. Do the home agency of the personal card and the teacher card need to match even if they don't necessarily work in that community?

Yes, the Home Agency should match on the personal and Teacher accounts. Library participation in teacher cards is voluntary, so if a patron comes in and wants a teacher card from your library, staff will need to inform them that their personal card would get updated in the process. Patrons only need to live OR work within the community in which they are getting the teacher card. BUT they must live in Wisconsin. This is always up to the individual library as well. Libraries can choose to be more restrictive in who they give teacher cards to.

4. Are Institutional cards the same as Teacher Cards? What's the difference?

No. Institutional cards are for just that, Institutions. Teacher cards are associated with an individual patron who takes on full responsibility of the items on their account. And they don't need to use their personal cards for materials for their classroom. Institution cards are associated with the Institution itself and take on the responsibility of the account. Any bills would get sent to the Institution address. Institution cards are also allowed more holds than teacher cards.

5. In the past teacher cards expired after a year, is that still the case?

Yes. The teacher card patron type is set up in CARL-X to expired June 1<sup>st</sup> of the following year. So, any teacher cards made now, will have an expiration date of June 1, 2022. We update the expiration date in the teacher template on June 1<sup>st</sup> of every year.

6. How long should libraries keep the Teacher Card forms?

This would be up to the individual libraires to decide. Staff can clean these out every year to see which ones have expired/been expired for some time. OWLS will start doing the patron purge

again, and teacher cards are included in this. When the list of purged accounts gets sent to libraries, staff can use that to remove any old forms.

7. Can patrons who live out of state get a teacher card, even if they work in WI?

No. Patrons wanting a teacher card MUST live in Wisconsin. They can live or work in one of the library municipalities, BUT, they need to be a WI resident.

8. If a patron pays the out-of-state fee for a personal card, can they still get a Teacher Card, if they pay for that too?

No. Libraries can issue personal cards to patrons who live out-of-state if they wish, but out-of-state patrons are not allowed to get a supplemental teacher card.

9. How do staff know if patrons already have a Teacher Card or not?

If a patron already has a personal account in the system, then they would need to go to the Notes tab of that account and look for any "TEACHER" notes. If there IS a note, then this patron already has a teacher card. If there is no note, then staff are good to move forward in making the new teacher card. The Notes tab is how CARL will "link" the two accounts. CARL-X doesn't have a linking function like Sierra did, so this is the closest way to getting accounts to "link."

10. What are the appropriate steps for creating a Teacher Card in CARL-X if they already have a personal card?

Once staff verify that a patron has a personal account in CARL, in good standing, all staff would need to do is click on the Clone button within their account. Then staff would need to change the patron type to Teacher and make any other appropriate changes listed in the instructions.

11. How should we enter in the name?

Molly made a mistake in the live demo when explaining this. It has been fixed in the documentation and explained here. When adding in the patron's name for their teacher card, staff should enter in the patron's first name into the First Name field and THEN add in "TEACHER" LASTNAME into the Last Name field. Previously, adding in "TEACHER" into the First Name field first, ended up with "TEACHER" looking like it was the middle name. Adding "TEACHER" into the Last Name field first will have "TEACHER" showing up first in the name field.

EX) Name: FIRSTNAME = MOLLY

LASTNAME = TEACHER, KOMP

12. Why does the library keep the Teacher Card (form with scannable barcode) and not just give to the patron?

According to the old committee documentation, the reasoning for this was to limit demand at non-participating libraries. Also, the committee liked that teacher checkouts would involve talking with staff and give libraries an opportunity to promote their collections and services. This can always be addressed in future discussions.

13. If staff use Connect for new registrations, then do they need to search for them in CARL-X in order to use the Clone feature for their Teacher Card?

Yes. As of now, the Clone feature is only available in CARL-X. Staff are more than welcome to create new/teacher cards in Connect, but if they are looking to use Clone to make it quicker to duplicate the personal card, then they would need to go into CARL-X to do so. Staff would just need to pull up the newly created personal account in CARL-X, and then click Clone for the teacher card account.

14. When using Connect for new registration and adding the teacher notes within CARL-X, will staff still see those notes in Connect?

Yes. If there is an account in CARL that has "TEACHER" in the name field, that account will show as one of results when staff search for that patron. When staff open that account in Connect, they will be able to see the teacher notes within the "staff notes" portion of the account.

15. Are staff using CARL-X mainly for creating new accounts?

It's a matter of preference when it comes to staff use of the two different platforms. OWLS did recommend using CARL-X for checking-in and checking-out mainly because of the functionality gaps with holds and the Big Red Boxes. But in terms of creating new accounts, it's up to the individual person.

16. Would it be best to review the Teacher Card procedure since it is out of date?

YES! This is an outdated procedure, created in 2010 and updated in 2016, that could use some fresh eyes to revamp. Times change quickly and there are many things that have changed about libraries in 11 years. This can be added to the AAC agenda and can be discussed in terms of creating a new committee to go over the current procedure and creating an updated version that works for everyone.