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MID-HUDSON LIBRARY SYSTEM
Resource Sharing Advisory Committee Meeting

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Date: May 6, 2025   **Location:** Online via Zoom

Committee members attending:

☒ Michelle Hoffman (Columbia)   ☒ Jaki Elmo-Emel (Greene)
☒ Shea Wert (Columbia)   ☒ Gina Loprinzo (Putnam)
☒ Carol Bancroft (Dutchess)   ☒ Donna Perolli (Putnam)
☒ Tom Lawrence (Dutchess)   ☒ Darren Lanspery (Ulster)
☐ Kimberly Benjamin (Greene)   ☒ Gisela Vella (Ulster)

Staff Attending: Laurie Shedrick (MHLS)

1:04 AM Call to Order

Minutes from March 11 meeting reviewed. Moved by Tom Lawrence, seconded by Gina Loprinzo. Approved unanimously.

County PTYPEs for unchartered towns
  a. Patrons within MHLS unserved
  b. Patrons served but in MHLS County

Some libraries want to offer patrons who reside in these areas access to services provided by the county, but limit some library-specific services and programs. Requests for these PTYPEs can be made on a county-level to MHLS. Committee members will carry the message back to their counties to discuss what might be shared through additional PTYPES.

Online Registration Barcodes in Mobile App
In order to check out physical items, patrons must have a 14-digit barcode. The mobile app pulls the first barcode in the patron record. The committee recommends that a workflow process be added that instructs staff to make sure the 14-digit barcode (with no spaces) is the first barcode field in the patron record

ACTION ITEM: Barcodes: New language for RS Standards
  Current language in RS Standards:
  BARCODE: Type or scan the patron barcode number. Do not add spaces.
  Update example:
  BARCODE: Type or scan the patron barcode number. Do not add spaces to the barcode string. Valid barcodes are numeric in format.

ACTION ITEM: Email Notification marked as SPAM
When patrons flag email notices as SPAM, MHLS runs the risk of losing the ability to send these notices from the Sierra server. When MHLS reaches a threshold of .01% SPAM reactions (approx. 3 per 1,000), Amazon Web Services (AWS) will place MHLS on a "warning list" that could ultimately result in being blocked from sending emails via AWS. Alerting patrons not to flag MHLS emails as SPAM is a start, and staff should understand the correct workflow to deal with this situation. In addition to the recommended addition to Resource Sharing Standards, libraries may want to insert a note into LX starter notices encouraging patrons to contact the
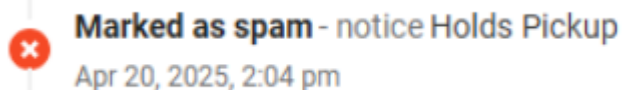
library to update preferences if they no longer wish to receive email notifications. A new email address for the patron may also be provided if they cannot list MHLS as a "safe sender."

Recommendation: Add the following policy to the Resource Sharing Standards in a new section "Email Notification"

Email Notification

Marked as Spam:
1. <u>Sierra Patron View</u>: Do not re-add the patron email field or update the notice preference when a note regarding blocked email is present in the patron record.
>   a.   Patrons who have marked a Sierra Circulation notice of any type will be set to Notice Preference = "Print" or "Phone," **not "None" or "Email."**
>   b.   The patron's email will be removed from the email field copied to a note field along with a dated message from MHLS technology operations staff, indicating that we have been notified that our email has been blocked by the patron.
2. **LX Starter View**: Do not re-add the patron email field or update the notice preference when the patron history includes any reference to **"Marked as Spam"**, as shown below:

Marked as spam - notice Holds Pickup
Apr 20, 2025, 2:04 pm

For more information, staff can refer to the Sierra patron record.
3. Remediation to reinstate email messaging include:
Patrons who have elected to establish the block must take the steps to remove the block before we can resume Circulation Notice service to email.
>   a.   The patron must first establish proof (a screen capture or print) of notices@midhudson.org listed as a safe sender.
>   b.   A ticket with Techsupport@midhudson.org must submitted with the proof unblocked status of the email notices@midhudson.org (Safe sender list)
>   c.   Staff will actively monitor the patron in LX Starter for block notification.

Update RS Standards "Printing Notices" Heading to simply "Notices"
The committee agreed to edit the language because printing notices is a largely outdate practice. Notices are typically sent by email, phone, or text.

MHLS Updates
The committee was updated on the adoption of Discover Kiosks, LX Starter, and the mobile app. Laurie also provided an update on Innovative Phone Alerts (IPA). Libraries that currently use TNS will automatically migrate to the new phone service. It was noticed that the IPA will originate from a different phone number, and that may be something patron notice. Also, libraries will have the ability to customize their own tagline, or use that standard tagline provided. Updated text alerts should be live by the end of the summer with an improved signup process. Analytics will be available with the new text service as well.

Meeting adjourned at 2:13 PM.
Next meeting: August 2025, date TBD by Doodle Poll
Minutes respectfully submitted by Carol Bancroft

Business Meeting of Thursday, June 5, 2025

1) <u>**Action Item #2:**</u> **Update to RSAC Standards for Barcode**
Background: The Barcode field should contain only 14 numeric digits. The first barcode listed in the record is considered the primary barcode.
Issue: The mobile app can render a scannable barcode from barcodes that do not contain spaces.

Current description: BARCODE: Type or scan the patron barcode number. Do not add spaces.

Recommendation: The committee recommends the following edit to the RS Standards:
- Patron Record Fields:
  BARCODE: Type or scan the patron barcode number. Do not add spaces to the barcode string. Valid barcodes are numeric in format.

  Procedures:

- The committee recommends authorizing MHLS to regularly clean up the barcode string to a numeric no space format.

- Valid Barcodes will be positioned first in the patron record

Status: Reviewed 5/6/2025 by RSAC
Effective Date: Upon approval

<u>**Action Item #3:**</u> **Circulation email marked as Spam**
Background: As reported in the February 2024 -MHLS Report to member library Directors:
Mail notifications sent from Sierra have been upgraded to an Amazon Email Relay (AWS SES). This is to keep with current industry standards adding DKIM (DomainKeys Identified Mail) authentication to our existing SPF (Sender Policy Framework) and DMARC (Domain-based Message Authentication, Reporting and Conformance). Gerry was proactive in identifying this as something we should do and worked with Innovative to complete the process. This helps ensure that your notices continue to be delivered to patrons' inbox without being blocked as spam.
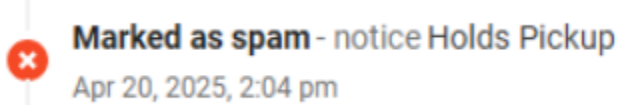The new standards are in place as a measure to protect individuals from bad actors who send unsolicited email, some with malicious intent. The new DMARC policy includes an acceptable threshold of .01% of daily spams without incident. A warning is issued for each blocked email and a threshold of .03%, indicates that the sender has passed the acceptable level of spam blocks and is blocked as a sender through AWS.
Issue: A "Block as Spam" will result in an entry in the Amazon Web Service's (AWS) suppression list. From point forward, AWS will block any emails sent from **Notices@midhudson.org**, to that address to respect the patron's request to block. Changing patron records in Sierra or in LX Starter will not remove the patron from the suppression list. Future emails will be blocked, and our sending email will be charged an infraction for any future emails from Sierra to that patron. Only the patron can remove the block by unblocking the original email in their own email client.

Recommendation: Add the following policy to the Resource Sharing Standards in a new section "Email Notification"

Marked as Spam:

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    a. Patrons who have marked a Sierra Circulation notice of any type will be set to Notice Preference = "Print" of "Phone", **Not "None" or "email"**.
    b. The patron's email will be removed from the email field copied to a note field along with a dated message from MHLS technology operations staff, indicating that we have been notified that our email has been blocked by the patron.
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