



Patron Record Clean Up for Alma Migration

In response to the CARLI Board's approval of the Resources Sharing Committee's recommendations on limiting the personally identifiable information (PII) being migrated to Alma, the CARLI Office asks each I-Share library liaison to complete this survey directing our next steps in data clean-up for your library.

Please complete this survey by Friday, 2/14/2019.

Please consult with your colleagues who work with fines/fees and patron record billing before submitting the survey to make sure they are aware of these decisions.

For more information about the clean-up guidelines, please see: [Patron record clean up for Alma Migration: Recommended and Required](#).

To download a PDF copy of this survey: [LINK](#)

Contact CARLI Support: support@carli.illinois.edu with any questions.

* 1. Select your Library:

* 2. Enter your name:

* 3. Enter your email address:

Before answering the questions below, please review this webpage for background and options: [Patron record clean up for Alma Migration: Recommended and Required \(https://www.carli.illinois.edu/products-services/i-share/circ/secure/datacleanup-finesfeespatrons\)](https://www.carli.illinois.edu/products-services/i-share/circ/secure/datacleanup-finesfeespatrons).

* 4. Please select one of the four options listed below for fine and fee forgiveness:

☐ **Option 1 (recommended): Library uses the same "forgive-before date" for both local and I-Share patrons.**

- *The CARLI Office staff will upload a report to the library's CARLI FTP directory of the patron's basic information, paired with their fines/fees that will be forgiven.
- *The CARLI Office will run the Voyager server Circjob 41, which forgives all fines and fees created within the given date range, for both local and I-Share patrons.
- *After running Circjob 41, the CARLI Office will run an updated version of the Voyager Discharge Macro to discharge the lost items on the patron's accounts, and then will update those lost items' status to "Withdrawn", "Missing", or "Lost- Library Applied" at the choice of the library.

☐ **Option 2: Library uses different "forgive-before dates" for local and I-Share patrons.**

- *The CARLI Office staff will upload a report to the library's CARLI FTP directory of the patron's basic information, paired with their fines/fees that will be forgiven.
- *The CARLI Office will run the Voyager server Circjob 40 separately for local patrons, and for I-Share patrons. Circjob 40 forgives all of the selected patrons' fines and fees; it is not limited to a specific type of fine.
- *After running Circjob 40, the CARLI Office will run an updated version of the Voyager Discharge Macro to discharge the lost items on the patron's accounts, and then will update those lost items' status to "Withdrawn", "Missing", or "Lost- Library Applied" at the choice of the library.

☐ **Option 3: Manual workflow**

- *The I-Share Library, or the CARLI Office staff, can generate a list of I-Share and of local patrons owing fines/fees to the library within the date range(s) for clean-up.
- *The I-Share library's staff can perform manual clean up in Voyager Circulation.

☐ **Option 4: Combination workflow**

- *Libraries could opt for a combination of Options 1, 2, and/or 3. (please explain)



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* 5. Forgive ALL fines and fees for BOTH local and I-Share library patrons created before which date?
(7 years required [before 1/1/2013]; 5 years [before 1/1/2015] or fewer is recommended.)

Fines and fees created before this date will be forgiven.

Example: 1/1/2013

MM/DD/YYYY



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- * 6. Forgive ALL fines and fees for LOCAL patrons created before which date?
(7 years recommended [before 1/1/2013]; 5 years [before 1/1/2015] or fewer recommended).

Fines and fees created before this date will be forgiven.

Example: 1/1/2013

- * 7. Forgive ALL fines and fees for other I-SHARE LIBRARY patrons created before which date?
(7 years required [before 1/1/2013]; 5 years [before 1/1/2015] or fewer is recommended.)

Fines and fees created before this date will be forgiven.

Example: 1/1/2013



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- * 8. For patron lost items discharged by CARLI Office staff, which item status should be applied?

- ☐ Withdrawn
- ☐ Missing
- ☐ Lost-Library Applied

9. Thank you for filling out this survey.

Is there anything additional you would like the CARLI Office to know?