New Setting: Retrieve Recent Patrons

Currently, you can retrieve the most recent patron that you've opened in the staff client (Circulation > Retrieve Last Patron).

The Evergreen 3.0 Web Client has a new feature that will retrieve the last several patrons (Circulation > Retrieve Recent Patrons). This will pull up a designated number of the most recent patrons you've opened up in the staff client.

Example Scenario: Jim returns some books and checks to make sure he doesn't owe any fines on them, then moves aside to look at the new books on display. Mary checks out a book and leaves. Jim comes back with a book to check out, and staff can retrieve his account without needing to scan his card again.

Example Scenario: Stephanie is paying off the fines on each of her 3 kids' accounts, so staff has them all open in different tabs. Staff accidentally closes one of the tabs, and uses this feature to retrieve it without asking Stephanie for the cards again.

Survey Results:

The following summary is based on survey results from 23 PINES Subcommittee members and Directors representing 20 library systems. Two questions were asked:

1. Do you think we should enable this feature?

Responses from Subcommittee Members:

	Responses	**Percentage**
Yes	10	91%
No	0	0%
Undecided	1	9%

Responses from Directors who are not Subcommittee Members:

	Responses	**Percentage**
Yes	11	92%
No	1	8%
Undecided	0	0%

2. How many recent patrons should we be able to retrieve in this manner?

Responses from Subcommittee Members:

	Responses	Percentage
1 (Just keep the current "Retrieve Last Patron" functionality)	1	9%
2 (Just the most recent patron and the patron before that)	2	18%
3 patrons	4	36%
4 patrons	1	9%
5 patrons	3	27%

Responses from Directors who are not Subcommittee Members:

	Responses	Percentage
1 patron	1	8%
2 patrons	3	25%
3 patrons	2	16%
4 patrons	0	0%
5 patrons	6	50%

Comments

- I believe that being able to retrieve the last two will take care of many accidental window closures. I don't have strong opinions about more than 2. I just don't think it's and unnecessary risk to patron privacy.
- I believe this opens the door to violate PINES policy of requiring to present a card to check out and also errors in accounts. This practice would allow for (grant permission) for staff members to select a patron and check out. This would eliminate also our defense of books being disputed on an account that a card must always be furnished.
- I have no concerns with the number of patrons able to be retrieved with this feature. If I were to suggest any limitation, it would be based on time since the account was originally retrieved -- expiring after a couple of hours or so. But even then, my feelings on that hypothetical limitation are equivocal at best.

- I like feature, but I'm concerned that staff may checkout on the wrong patron's account if we are able to retrieve too many accounts.
- I think it would be helpful to have 3 for a mom and 2 kids. More than that could be a liability or endanger patron privacy.
- I worry that Staff will accidentally check out books to the wrong patron.
- I'm not opposed to a higher number. Busier locations may want that. I think there reaches a point of diminishing returns, however.   I don't think you'll be able to make everybody happy.   It is a great feature, a logical and reasonable addition. I hope to be using it come January 16, 2018