

NLS Telephone Forum – 12-04-2019  
(paraphrased)

**Comment: (Richard Smith - NLS)**

Thank you, Brandon. We have 39 people on the line, so that's a good number of libraries calling in. A good (representation of) everyone from around the country. We have a nice group here and I'm going to go around the table. To my left is...

**Comment: (Library Staff - NLS)**

David Spett, NLS Data Analyst; Ed Field, Special Assistant to the Director; Tamara Rorie, Braille Development; Alice O'Reilly, Materials Development Division; Vickie Collins, Network Services section; Kristen Fernekes, Head of Communications and Outreach; Shana Osborne, Equipment Control Officer; Margie Goergen-Rood, Quality Assurance; Dominick Spinelli, Collection Development; Phil Carbo, Audiobook Production; Paula Bahmani, Education and Training; Don Olson, Network Services; Juliette Appold, Music Section; Steve Prine, Network Division; Karen (unintelligible), Project Coordinator; Meredith Beckhardt, Reference; MaryBeth Wise, Network Services...

**Comment: (Richard Smith - NLS)**

And Richard Smith, Chief of the Network Division. Welcome everyone. We just finished up the Thanksgiving Holiday. Now we're looking forward to Christmas, right? We'll have our Christmas party on the 18<sup>th</sup> and we'll enjoy that, but we have a lot of things going on even this past week, with the Veterans Administration visiting us and a lot of other things going on. I want to start – first on our agenda – with referral sources and David Spett.

**Comment: (David Spett - NLS)**

Thank you, Richard. As most of you know, and as we have discussed on prior Open Forum calls, NLS is working to understand how applicants hear about NLS services. Whether it's from friends, librarians, rehabilitation services, TV ads, the list goes on. This will be to the benefit of the whole Network. NLS will share our findings so that libraries can learn more about patron referrals if you don't have this information already. Plus, you'll be able to compare yourselves to peer libraries and to the nation as a whole. This effort will also help NLS' ability to respond to questions we receive from across the legislative branch. To accomplish this initiative, we are working to standardize referral source tracking across all applications and circulation systems. Right now, NLS does not collect data on how patrons get referred to NLS or to Network libraries across all of our channels. With your help, we can begin to do so.

We have been working with Keystone and with Data Management, to ensure that resource tracking is standardized in a way that works for NLS as well as the whole network. Once this information is entered into your circulation system for each patron, it will be sent to PIMMS where NLS can view the data. We will keep you posted on these efforts and rollouts. For WebREADS libraries, a new field will launch in the next few months – that allows you to list one or more referral sources for each new patron. In the coming months, we will provide information on timing, and we will provide additional context for each option on the list. We'll also be available to answer any and all questions you might have in advance of the rollout. KLAS libraries are on a different timetable. We know most of you already track referral sources, and we'll be reaching out to both you and to Keystone to make sure the mapping works with NLS' list. In some cases, we may ask you to add or change options from your existing list of referral sources. If you have questions, please don't hesitate to reach out to me anytime My email address is [dasp@loc.gov](mailto:dasp@loc.gov).

**Comment: (Richard Smith - NLS)**

Thanks, David. Next on our agenda, we have the Single Sign-On system update – and that will be Meredith...

**Comment: (Meredith Beckhardt - NLS)**

I was hoping to come here to let you all know that we're ready to send the remainder of the usernames out to the Network, but I'm actually going to pause this, because – I want to be frank with you – I have been logging into the system quite a bit lately. What started as just a hiccup seems to be more of a recurring problem – and I'd like to resolve this before new users get onto the system and just get frustrated with logging in. As some of you may have experienced, sometimes when you login to Single Sign-On, after you put in your credentials and your two-factor authentication code, an error message comes up. What I want to make sure you DON'T do, is hit the 'reset password' button because this isn't a password issue. Like I said, it's just some strange hiccup. If you (re-input) the URL, and go back into the system and start again, usually it lets you right in. But, this is happening quite frequently. I'm working with our I.T. people here. We made some progress today on narrowing down where we think the problem is. I don't know if it's going to be a quick resolution, but I think we're getting closer to figuring out the

problem so, I'm sorry for the delay but I wanted to be frank with you and explain why I'm delaying the rest of the rollout to the Network. While I have the floor – if Richard doesn't mind – I want to talk about one more issue. I want to talk about something with PICS. So, later in December, all of our PICS passwords are changing. The last time PICS passwords changed, it was around 2015, and things were handled much differently then than they're going to be handled this month. Back in 2015, the passwords were actually changed here – and then one of our staff people reached out to every single Network library and said, "here's your password." That's obviously not a very secure thing to do. We're changing the PICS passwords to conform to some new federal security requirements, so we want to do this right. You will be changing your own passwords and (unintelligible). Later this afternoon, I think they will be working out an exact date on when this will happen.

The day before the code is actually promoted to our production system, I'll send out an Operations Alert. I've listed out all the new parameters of the new password – for instance, whether you need it to have an uppercase or lowercase or numeric. All that information will be in the Operations Alert. What I'd recommend that you do – because these are shared passwords – (is) that you have a designated person in the library that will be the one who changes the passwords, and then that person will be responsible for communicating to the rest of your staff what the new password is. Keep in mind that each library has two different PICS passwords. There is a read-only password, and the username for those is just your library code. For instance, Texas' read-only account username is TX1A – and then there's also an admin account, and so in Texas' case it would be TX1A admin (**transcriber's note: upper/lowercase not specified**). So, everybody has the same formatted username. Make sure that after this date that you change both of those two user accounts with your new password. These new passwords – you wouldn't have to change them again for another 360 days, so it will last quite a while.

**Comment: (Richard Smith - NLS)**

Next on the agenda, I have our Outreach for Veterans and, that will be Kristen...

**Comment: (Kristen Fernekes - NLS)**

Hi everybody. I wanted to give you an update. For those of you who were in San Antonio this past spring or summer, we did a presentation about Veteran's Outreach and about some of the things that we were working on and hoping to accomplish – so, I wanted to give you a bit of an essay because today we had a really excellent meeting with a group of 14 people from Veteran's Affairs. These are individuals who work with blind rehabilitation facilities across the country, so, many of these individuals are people who supervise folks who are either working at these facilities or supervise individuals who go into the homes of veterans who need assistance, specifically blind rehabilitation. We had a really excellent meeting. There was a large group of individuals from NLS who were able to speak to this group. I wanted to convey first and foremost, their enthusiasm for the NLS program and the work that's being done not only here but at all of our Network libraries around the country. These people are big supporters of this work and they're very appreciative, and we of course, expressed our interest and appreciation in them helping us get the word out even further. We know that this program within Veteran's Affairs sees over 1 million individuals who either are blind or who have visual impairment significant enough to impact (their day-to-day functionality).

We want to make sure that we're helping them in every way possible to pass the word along about NLS' services and the work that is being done at Network libraries. One of the main things that I wanted to convey is that – something that they're very interested in is hoping to get ways of streamlining signups for individuals that they see. One of the things that they had asked us about was getting demonstration BARD accounts so that it would be very easy for them to show (prospective) patrons what is available to them from the standpoint of resources and services that we provide – and obviously, our collection. Paula was able to pass along some information to these individuals about how that could be done, introduce them to applications for institutional membership. I wanted to bring this to everyone's attention because, if you hear from these folks, please make it a priority to speak with them. I can't state enough how enthusiastic and pleased they were so, we think that this is a great opportunity for us and for all of our libraries across the country. If anybody has any questions – if anybody gets any questions from folks within Veteran's Affairs, if there's anything we can do to be of assistance, please let us know.

**Comment: (Richard Smith - NLS)**

Thank you, Kristen. They were enthusiastic. They specifically asked for BARD Mobile accounts and demos so that they could demo it to the patrons coming in. A lot of the centers around there...get patrons from many states, so they want to demonstrate BARD Mobile, so when they go back home to their state, they can sign up as individuals so, we're really excited about that. I'm going to look up and down the table and I think...Marge...

**Comment: (Margie Goergen-Rood - NLS)**

Hi this is Margie Goergen-Rood from Quality Assurance and I just have a quick note that – believe it or not – in 2020, we are going to be getting to six-digit numbers for your audiobooks – and that’s kind of an exciting point – bookmark for us. At this point, I have a DB100000 that is going to be working its way through the system as a test book and, we’ll see where we at NLS, will find any problems, glitches, that sort of thing, so that we can get it all straightened out by the time we actually hit that number and the 100,000-and-up numbers so that you folks can be downloading those. It’s an exciting time.

**Comment: (Richard Smith - NLS)**

That’s a nice milestone at basically 100,000 and we’ve been working with the vendors – both Keystone and WebREADS and everyone, to make sure it works with the systems. I did want to mention – because I know that maybe John and Kim are out there listening and they asked for an update on (putting) local books up to BARD – and basically, we know there is a problem there and because of key staff member turnover, we have issues with updating books onto BARD that we don’t have answers for. We are working on it. We know of it. We’re trying hard to resolve it but we’ve got to get some additional staff members in here to work on that problem, but it is a priority (with) us, and I think – Phil Carbo and Paula, you both – is that an explanation basically of what’s going on with that?

**Comment: (Paula Bahmani - NLS)**

Yes Richard, it is. Thank you (laughter).

**Comment: (Richard Smith - NLS)**

It had to be said – and there is concern out in the field. I don’t think we have a deadline. Someone mentioned two months, but we’re also thinking that may be optimistic. So, we’re working on it and stay tuned and, if we get a workaround or get it resolved, we will send out an Operations Alert. Okay, I’m looking around. Don Olson...

**Comment: (Don Olson - NLS)**

Good afternoon everyone. There’s a short update. BARD is getting ready to move forward in a number of ways and so we’d like to give you a “heads up.” You’re able to see it before any patrons do... There will be a few new features rolled out on BARD. This will be sometime – not necessarily in the next couple weeks, but really in the weeks following. And so, what I’m asking of you all, is to – one day soon, starting, let’s say, in two weeks which will be the 18<sup>th</sup> or so, of December – if you would login to Practice BARD and look specifically into the Admin page and see what the changes will entail. We just don’t want you to be surprised when they one day appear on BARD. So, again if you would simply login to Practice BARD, that would be great. If, number one, you don’t have Practice BARD accounts or, number 2, it’s been quite some time since you (used) Practice BARD, send me an email at [bardops@loc.gov](mailto:bardops@loc.gov) and we’ll get that all taken care of. Thank you.

**Comment: (Richard Smith - NLS)**

Thank you, Don. We’ll look around the table. We’ve got a lot of staff here to answer questions, so, Brandon will open it up for questions from the field. Thank you.

**Question: (Sharon Ruda - IL)**

Hi there everybody. I have a couple of questions. First of all, there doesn’t seem to have been a bestseller list posted since September, and my Collection Development person was wondering about that.

**Answer: (Steve Prine - NLS)**

We’ve experienced some technical problems but, I thought it was actually up. I’ll check on it and we’ll get it up.

**Comment: (Sharon Ruda - IL)**

I just wanted to mention in regard to Veteran’s Outreach, I’m sure some of you know Hines Hospital in Chicago. It’s (like) a major city. A number of their instructors are patrons of ours – institutional members. One of them is in charge of the 34-bed area and they have machines assigned to each bed – each person, so that while they’re there, they’re trained and go home knowing how to use BARD. We also have had in the past, veterans – rehab instructors – on our Advisory Committee, and that’s been really helpful. In October, we had a big “Veteran’s History” program here, with our Department of Veteran’s Affairs. The head was quite impressed with the Talking Book program. She was not aware of it before coming to the library and, was very interested in sharing information. If you haven’t contacted your state Head of Veteran’s Affairs, you might want to do that.

**Comment: (Ava Smith - TX)**

Hello everybody. Well, first off, this is my last conference call. My last working day will be December 19, and then I will be going off – as my colleagues say – on the seven-day weekends. So, I wanted to introduce the new Director of TX1A, Sarah Jacobson.

**Comment: (Sarah Jacobson - TX)**

Hello. Good to be here. I look forward to working with everyone.

**Comment: (Ava Smith - TX)**

We'll put something out on the Network discussion list, with her contact information and everything.

**Question: (Maureen Dorosinski - FL)**

Hey, okay. Well, here we're kind of freezing in Florida. The low has been in the 40s. We're freezing. We're not happy. We're wearing sweaters. I do have a few questions here. First of all, will we have the new cartridge protect software coming out soon?

**Answer: (Paula Bahmani - NLS)**

Hi Maureen. We're in the process of posting that DTBC Write Protect software and, we'll send out a notification once it's available for download. It will probably be available both on the new network site, but since not everybody has access to that, it will also be available on PICS.

**Question: (Maureen Dorosinski - FL)**

In a few weeks or so, then?

**Answer: (Paula Bahmani - NLS)**

Yes.

**Question: (Maureen Dorosinski - FL)**

The second (question) is: I was wondering if you able to send out any new braille cases?

**Answer: (Alice O'Reilly - NLS)**

I'll talk to that – and it won't be completely authoritatively because I only know a little bit about it. I know that we have made a short-term purchase for braille cases to try to accommodate some of the requests that have yet to be filled. We've solicited for a contract for a larger number and we're in the process of evaluating the bid. So, hopefully that should get wrapped up in a couple of weeks...so we've got kind of a two-track approach toward meeting that need and hopefully you'll be able to see some braille cases in the Multi States. I can talk to Zaneta about sending out an Operations Alert when that first initial order gets filled and then hopefully that will let you all know to expect those to be available. I think for the initial order it should be a month. For the larger order that's done on the contract that's being bid, there might be some lead time. I can't tell you when. We do know that there's a need so we were able to procure a smaller amount before the initial contract expired.

**Question: (Maureen Dorosinski - FL)**

This last question: There's a chance that we might not be able to use all of our recall number. We were given a number and if we don't have the staff to pull the books, who should I send that number to?

**Question: (Steve Prine - NLS)**

What is the quantity you're not going to be able to send?

**Answer: (Maureen Dorosinski - FL)**

I'm not exactly sure, but it might be a few hundred.

**Answer: (Richard Smith - NLS)**

So, get together with Steve and he'll take care of you, Maureen.

**Answer: (Steve Prine - NLS)**

We'll talk offline from this call.

**Question: (Deborah Stroup - MO)**

My question is for Paula and/or Phillip. When I do a Book Completion form for the BARD books...that doesn't seem to be going through either – as well as the upload site not working. Have you had any experience with that or (has) anybody else said anything about that?

**Answer: (Paula Bahmani - NLS)**

We have not heard any other complaints about that. If you could maybe send me the URL that you're using, just so I can verify that it should be transmitting and going through to BCS. We should be able to resolve that issue.

**Question: (Deborah Stroup - MO)**

Okay. And then I have one more question that's related: When I reject a book because the bib record isn't accurate, and I send my email to BCS, they fix it in Voyager but it does not get fixed on BARD.

**Answer: (Paula Bahmani - NLS)**

That sounds to me like it's a breakdown in the system. Those books (where) changes are made in the bib record, should be reloaded. Not by you but by someone here at NLS. I'll circle back around and make sure that the channels of communication are open and that we make sure that we get those posted properly.

**Question: (Amy Nickless - MO)**

I was wondering, in relation to the updates on BARD, are you intending to add information about series and series order and if not, could you? We have patrons asking for that information all the time.

**Answer: (Library Staff - NLS)**

Those discussions are ongoing so, I'm not sure where we're at – at this point. So, that specifically – we'll have to get back with you on that.

**Question: (Gabe Kramer - NE)**

In regard to the BARD upload site being down: For those that are on a WebREADS/Dupe-on-Demand library, is there a workaround to that at this point?

**Answer: (Paula Bahmani - NLS)**

I believe there is not.

**Question: (Gabe Kramer - NE)**

Okay. And then, the PICS passwords are changing in a few weeks (or) a month. Are those going to be part of the SSO system?

**Answer: (Paula Bahmani - NLS)**

Not yet. This is still the old PICS. I'm not on that transition team – for when the new PICS will go over to SSO. Currently it is not. It will be separate still, just like it is now.

**Question: (Gabe Kramer - NE)**

Okay. I'm just not seeing the logic in changing passwords now, when we're going to have to do it again in the future.

**Answer: (Paula Bahmani - NLS)**

Well, in the future when it's on SSO, you have your own personal email and it won't be a shared password anymore. But until we transition PICS over to the Single Sign-On system, we'll continue with the shared password system that we have for the old PICS.

**Question: (Gabe Kramer - NE)**

Okay. Do you have an ETA for the transition?

**Answer: (Paula Bahmani - NLS)**

Like I said, later on this afternoon – I know they're working on a date where they need to coordinate having the code promoted to the production system. It's kind of a delicate dance where I need to make sure I send out the Op Alert the day before so hopefully you'll all be in line...I'm thinking in a week or so – two weeks? Something like that. It has to be before December 31, so it has to be within the next few weeks.

**Question: (John Mugford - NM)**

Hi Richard. Thanks for acknowledging the concerns about BARD upload, because it's largely volunteer based, and we get questions from volunteers we see less frequently. I just want to be clear on the reporting of this information. My understanding – based on your comments – is that the delay, which is already a month old, is likely to last for another two months, and that the cause is primarily staffing-related. Is that correct?

**Answer: (Richard Smith - NLS)**

Absolutely, John. We had staff turnover in our I.T. department that wrote the code for that – and it's going to be a while before they're replaced.

**Question: (John Mugford - NM)**

Okay so, if I'm queried, shall I say at least two months, perhaps longer?

**Answer: (Richard Smith - NLS)**

That would be a good answer.

**Question: (John Mugford - NM)**

Okay. What would be the longest likely time frame?

**Answer: (Richard Smith - NLS)**

We don't know, John.

**Question: (John Mugford - NM)**

Okay. And it is not otherwise addressable in any way. It is not technical in nature, it is staffing support-related?

**Answer: (Library Staff - NLS)**

Right.

**Question: (Erin Pawlus - AZ)**

Hi. So, I am very happy to hear about the braille containers. I have not bothered to put in an order in a long time because it's been out of stock at all the Multi State centers. Would you recommend I go ahead and do so, so that it can at least be back ordered, and you know how many I would like to have in an ideal world?

**Answer: (Alice O'Reilly - NLS)**

I don't think that would hurt... I can't think of any reason that that would be a bad idea. And then, like I said, I'll ask Zaneta to put out an Operations Alert and then, depending on how many we get versus how many are wanted, we might have to do some partitioning and make sure that we don't fill the first order and leave 90 orders empty. We'll have to be judicious about sending them out but just rest assured that there's another contract being signed and that we'll have larger quantities available later.

**Question: (Babak F. - VA)**

Hi everyone. I'm down at VA1L. I had a question regarding BARD practicing of the new features. I can't speak for the other subregional libraries obviously but, the holiday season gets a little wacky in our area, given the mail (and) with these many alerts and developments happening right around that week, I was just wondering if you could say a little bit more about what we might expect specifically around Christmas, just so that I can brace myself and my staff here for the things we might be seeing.

**Answer: (Don Olson - NLS)**

I'll just talk about a couple of small things but, (things are) still in flux so, I'm certainly not going to go over the entire list of what you're going to see. But, for example, there will be information on the admin side, relating to adding and subtracting subscriptions to book series and magazines. There will be functionality changes concerning wish lists – again, adding and subtracting and basically managing wish lists, so those are the two highlights I'll bring out today. Logging on to Practice BARD is optional. I do encourage you and your staff at one time or another to give that a try, just so you're not surprised when the code does go live.

**Comment: (Mary Jane Kayes – CA9)**

Back to the very beginning – about the VA – there are centers like the one Sharon described... The vets are there for a really long time. There's no reason that every one of those vets shouldn't be going home with an account. But, they need to be from their home base and not from the base where the center is. We had to unsnarl that here in California... So, make sure that every one of those places knows how to fill out all the applications (for the state they will be living in).

**Comment: (Kristen Fernekes - NLS)**

We do recognize that that is an issue that the VA runs into – and that's something that we're in ongoing discussions with. We do know that some of these veterans are in rehabilitation facilities or hospital facilities for a long period of time, and in many cases, it's uncertain as to where they're going to be going. It's not clear. And so, we have been discussing whether or not there's an opportunity for us to get some signed up and somehow transfer them, because one of the pieces of feedback that we got – we actually surveyed the people in this entire system several months ago to get a sense of where they were running into problems and we were finding that in some cases, that move was causing problems. We're trying to figure out if there's a way to work around that, as opposed to any work a wounded veteran needs to do when they get home. So thanks for that input, it's helpful.

**Comment: (Richard Smith - NLS)**

I guess since we're talking local books – the ones that are out there, we really want you to use them, and I'll give you a tip on – especially since we're in the holidays. If you go into BARD in the keyword search, if you type in "DBC" and "holiday" or "holidays" you'll get a nice list of probably over 100 on Christmas or Chanukah or Kwanzaa – or many of the holidays your patrons may not have read, but they have a local flavor. So, that's your tip and I thought I'd fill in a little void here.

**Question: (Alicia Waters - RI)**

Hello everyone. Sorry to hear that you're freezing down there. Of course, we're freezing here in Rhode Island, too. I wanted to find out: The National Library Service – you guys are still suspending BARD accounts of patrons who are six months inactive, correct?

**Answer: (Library Staff - NLS)**

Correct.

**Question: (Alicia Waters - RI)**

Is there any way that you could let us know prior to suspending them or their email addresses? Maybe we could contact them before they're suspended? Because I noticed my BARD account numbers are just dwindling. They're going down and down and down. I think that every month, NLS is suspending BARD members.

**Answer: (Library Staff - NLS)**

That's very good input. We have had discussions to that line, so those discussions will continue. Obviously you did give your feedback. We'd like to hear from others as well.

**Comment: (Alicia Waters - RI)**

I'm working hard to get people in BARD. We're adding every month. But every month when I prepare our monthly data, I see the number going down which is very discouraging. So, if it's possible to get those email addresses with those names prior to, I'm sure we could reach out to many of them. I'm sure we could get many of them to reactivate.

**Comment: (Michael Lang - KS)**

In response to that, I was able to kind of get a list together of people who had been recently suspended on BARD on our side and, we got a response rate of 25% of the people we contacted (who) reactivated their account. People responded. They were like "Oh, I didn't know that I had lapsed" and they were really excited to get back – activated into the system.

**Comment: (Library Staff - MO)**

This whole conversation has made us laugh because some of us have been kicked off of BARD because we were inactive for a short time. Wolfner also notices a great decrease in members on BARD and we should be seeing an increase, so we also would like the list (beforehand) so we can call our wonderful patrons to remind them.

**Comment: (Richard Smith - NLS)**

The good news, I think – just a preliminary report – some of the statistics are coming in, I'm sure you're aware (of) it. On individual readers, we stopped a three to four-year downward trend. I think we're up a good 8 or 9%. And I think down the road we'll be publicizing that – from the circulation statistics, fiscal year 2019.

**Comment: (Mark Lee – PA8)**

Richard, I don't really have a question. We want to thank you guys at NLS for all the help and support this year and we hope you have a great holiday and I'd also like to extend that to the whole Network from here. It's a great network. We call everybody all the time for help and support. And in that same vein, I'd like to thank Ava Smith because she's helped us out a lot from Texas – and I hope she has a great retirement making quilts (laughter).

**Comment: (Richard Smith - NLS)**

Okay. With that, I think we had a great December call. We'll talk to you in January. Have a good day!