

Updated and Approved:  
Circulation Committee: 12/16/2016  
Exec Board: 8/18/2017

Amended sections approved by Circulation Committee 5/27/2019  
Approved by the NorLN Executive Committee: 08/09/2019

## CIRCULATION GUIDELINES AND PROCEDURES

To protect the integrity of the joint database, please adhere to the following guidelines by obtaining as much patron information as possible and following the procedures as stated for the sake of continuity of data. To protect patrons and libraries, libraries must verify patron identity prior to checking out materials according to local policy.

NorLN member libraries lose thousands of dollars in materials each year because of incorrect information that results in returned overdue notices, disconnected telephone numbers, etc. Duplicate patron entries in the database also add to this problem.

***Be sure to search for a patron before creating a new record.***

## PRIVACY STATEMENT

Confidentiality of Patron Records – The Northern Library Network and its member libraries recognize that its circulation and other records identifying the name and personal information of library patrons are confidential in nature. These records will not be made available to any person or agency of local, state, or Federal Government except pursuant to such process, order, or subpoena as may be authorized under the authority of, and pursuant to local, state, or Federal law relating to civil, criminal or administrative discovery procedures of legislative investigative power. (Based on WV Code Chapter 10 - Section 10-1-22 confidential nature of certain library records)

**Library staff members are reminded that patron records are *confidential* and to be used ONLY for necessary library business**

**See also the attached Circulation Quick Start Guide (QSG) for detailed Sierra functions, examples and screenshots**

## NorLN Circulation Guidelines and Procedures Index

### Sierra Quick Start Guide (QSG) Location for steps

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## ISSUING A LIBRARY CARD

**BEFORE ADDING A PATRON, CHECK TO BE SURE THAT THE PATRON IS NOT ALREADY IN THE SYSTEM  
EACH PATRON IS TO HAVE ONLY ONE ACTIVE LIBRARY CARD!**

### Definitions

- **Patron Agency:** The main library that issues a card to a patron. This library's four-digit ID # would be on the barcode of the library card that is issued. **(Branch libraries do not have their own patron agency number.)**

**NOTE:** The Patron Agency will not change unless another library issues a replacement card from their library with their four-digit ID# on the barcode. If this occurs, the library issuing the new card will change the Patron Agency to their library.
- **Home Library:** The library that serves the area where the patron lives.

**NOTE:** A patron's home library is not to be changed unless the patron moves and shows identification to that effect. If this occurs, the library that serves the area where the patron has moved will change the Home Library to their library.

### Registration /Application

- Patron must be present to register for a Library Card
- A photo ID and current mailing address are required for issuing a library card. If the photo ID does not include a current address, one additional proof of current address must be presented (i.e. Checkbook, current cancelled mail, or car insurance/registration). If no photo ID is available 2 other proofs of identity may be accepted according to local library policy.
- **Children's Cards:** The age at which a child is issued a library card is set by the local library policy. Children's cards **require** the same information as adult cards. A parent or guardian **must** sign for a child to receive a card.
- **UNIQUE ID: SEE APPROVED ADDENDUM UNDER SECTION 5**

## Creating a New Patron Record

\*Please Refer To the Circulation Quick Start Guide Page 5

To add a new patron:

- Click on 'New' icon on the top horizontal toolbar
- In the pop-up box, highlight the correct template and click 'select'
- A series of boxes with prompts will pop up for you to complete. After you fill in a prompt, hit next and it will take you to the next one. [Note: If you hit next and then realize you made a mistake on a previous entry, you can correct the record once you have completed all the prompts. When you are done with all the prompts, the patron record will still be open. Choose the respective field and make the needed correction.]

### Prompts:

#### 1. Patron Type

- To choose another option (i.e. student, new patron), double click in the entry box and choose from the drop down list.

#### 2. EXPIRATION DATE

**Example:** mm/dd/yyyy

- 8-digit format
- The expiration date should one year from the current date.
- TIP: Type 't' in the box and it will fill in the current date. Backspace to change the current year to the next year.

#### 3. BIRTH DATE

**Example:** mm/dd/yyyy

- 8-digit format

#### 4. GENDER

- **Revision: Gender is no longer a required field. (Library directors may submit a request to WVLC technician to have the popup reinstated in their individual library). Those libraries still utilizing the information may enter the information manually.**
- **(Amended and approved 05/17/2019)**

**5. UNIQUE ID****Example:** JODO122480 JOHN DOE 12/24/1980

- The unique identification will consist of the first two letters of the first name, first two letters of the last name, and 6-digit date of birth. (see example)

**Note:** This revision was approved by the Circulation Committee and the Norln Committee at the annual meeting in Morgantown 2019.

**6. PATRON BARCODE**

- Scan or type in the barcode from a new library card (once scanned, it will automatically take you to the next prompt).

**7. NAME****Example:** SMITH, JOHN RAY**For Names with Suffixes:****Name Field 1:** SMITH JR, JOHN RAY**Name Field 2:** SMITH, JOHN RAY JR

- Full name including middle name is required.
- Enter in **ALL CAPS**: last name (comma) (space) first name (space) middle name.
- For **names with suffixes two name fields are needed**, with each entry being different:

**Name Field 1** (this name field is used on notices):

Last name (space) suffix (comma) first name (space) middle name

**Name Field 2** (this name field is used for indexing and searching):

Last name (comma) first name (space) middle name (space) suffix

**NOTE:** The second name field is not available when completing the template prompts during the initial entry. After completing the initial entry, you will need to insert the second name field.

**8. MAILING ADDRESS****Example:** PO BOX 22

CLARKSBURG WV (two spaces) 26301

- In **ALL CAPS** with **no punctuation** (except in the extended zip code)
- Be sure addresses are correct per USPS guidelines.

**9. PHYSICAL ADDRESS****Example:** 610 EAST MAIN STREET

CLARKSBURG WV (two spaces) 26301

- In **ALL CAPS** with **no punctuation** (except in the extended zip code)

**10. TELEPHONE NUMBER**

**Example:** 304-123-4567

- A landline or cell phone number is required (NO EXCEPTIONS)
- This entry should be the one the patron prefers (Please note that the number listed under the Home Number Field is the one that shows up when the Hold slip is printed.)

**11. CELL PHONE NUMBER**

- Use same format as above

**12. DRIVER'S LICENSE**

**Example:** WV C1234567

- Two letter postal code for the issuing state (space) number
- A state photo ID may be used in place of a driver's license
- Not a mandatory field as some patrons do not have a license/state ID.

**13. EMAIL ADDRESS** (may be case sensitive)

**14. CONTACT NAME**

**Example:** JONES, ROBERT LEE OR\_ABC COMPANY

- This must be someone **NOT** living in same household (relative/neighbor/friend) or place of employment
- Use same format as 'Patrons Name'

**15. CONTACT ADDRESS**

**Example:** PO BOX 100 CLARKSBURG WV (two spaces) 26201

- Above information will all be on the same line

**16. CONTACT TELEPHONE**

**Example:** 304-123-4567

**17. INITIALS**

**Example:** XCABC

- The registering staff person **MUST** put their (3) character initials in this field preceded by the library's two character code.

When you have completed the record review for accuracy, make any changes if necessary, save and close the patron record.

## **Information to Give Patron**

At the time a card is issued, the patron should be informed that:

- They are being given two cards— a regular size wallet card that they should sign, and a key ring card (show them how they separate).
- The card can be used in any of the NorLN libraries, but that certain libraries in the system may require additional information before permitting the borrowing of their materials.
- Replacement card fees will be determined by each individual library.

**Note:** Placing a piece of tape over the patron's signature will keep it from coming off easily

## **ISSUING A REPLACEMENT CARD**

**BARCODE NUMBERS FOR LOST CARDS ARE TO REMAIN ON THE PATRON RECORDS.  
DO NOT DELETE LOST CARDS FROM A PATRON'S RECORD!**

Insert new barcode field, scan the new card number

At the end of the lost card number field type (lost card) **Example:** 1234000001234(lost card)

- Insert a Note Field on the record (2<sup>nd</sup> card, date, and library and staff initials)  
(Or whatever number if it is more than the 2<sup>nd</sup>)  
Remember when you edit a record; add your two-letter library code and your initials at the bottom of the record if you were not the last person to make changes.

### **SAVE RECORD**

- For libraries that are still using a replacement fee of 3.00:  
Click on Fine Tab, choose Add Charge, click on predefined, and click on 3.00 replacement card. The \$3.00 charge will appear on the fine record If collecting today, click on collect money, OK. (This will keep a record under Fines Paid).
- For libraries that determine another replacement fee:  
Click on Fine Tab, choose Add Charge, enter the amount, and enter a reason for the fine (i.e. Replacement Card \$XX.XX).

When a lost card number is scanned a warning pop up box will appear. Click YES this will let you know who this card belongs to. At this point the lost card should be shredded. **The new barcode number should be above the old number on the patron record once you have saved. The new number needs to be above the lost number so it will show in the window of the record.**

## **UPDATING AN EXPIRED CARD**

Patron cards will expire annually. When a patron attempts to use an expired card, the visited library is responsible for updating the essential information and renewing the patron's card at that time. If a major change is made to the patron's record when renewing such as new address, phone, contact person and info, make change and add your 2-letter library and initials, unless your initials are the last to appear on the record. Expired cards may affect access to digital resources.

**\*\*When updating the record ask the patron\*\***

### **WHAT IS YOUR CURRENT ADDRESS AND TELEPHONE NUMBER?**

(PLEASE DO NOT say, "Is everything the same")

Also, confirm the contact name, address, telephone number, email, etc.

Review the entire record for completeness and accuracy.



## LINKING PATRONS

\*Please Refer To the Circulation Quick Start Guide Page 7

Family members are not the only patrons that can be linked. Patrons can be linked for any reason. Some suggestions are students with their teachers, husband and wife, and parents with children. Remember a patron can only be an active link once, meaning they must be removed from one group in order to be placed in another group.

(Patrons can be linked for any reason seen fit by the library staff)

## PLACING A PATRON BLOCK

Patron blocks can be selected for: having given bad checks, returning materials damaged, not having an address or having an incorrect address or an incorrect telephone number. There are several options to choose from in the pop up box. Please remember to put a comment in the message field to alert staff why the block has been placed.

**Placing a block on a patron record may require circulation supervisor approval.**

To access the block options, you must edit the patron record, click the "Manual Block" box. A pop up box will appear. You will then select the option that explains why you are placing the block. Once you have made your selection, click OK. You can also select the "Patron Message" box and select "See Supervisor".

Again, any time a block is placed a message may be needed in the patron record to briefly explain the block more fully with the date and the 2-digit library code and your initials.

**Note:** Messages will pop up when a patron record is opened, a note will not.

## CHECKING OUT MATERIALS

\*Please Refer To the Circulation Quick Start Guide Page 8

**Patrons must present library card to check out materials for the protection of the Patron and Library.**

Check to make sure card is not expired. If it is please ask the patron to verify information, and add the library code and staff initials, unless your initials are the last to appear on the record.

**Check to make sure patron is not near expiration.**

**This will cause a change in the due date of library materials**

**Remember to always close the patron screen immediately after check out to receive print out with due dates. This also completes the transaction. Also remember to check the screen after each check in/out for accuracy.**

## CHECKING IN MATERIALS

\*Please Refer To the Circulation Quick Start Guide Page 15

**Checking in Procedure when checking in another NorLN Library's Materials:**

If a patron returns a book to your library from another NorLN Library, please check the book in by scanning it as you would one of your own books.

**The screen will give you four options:**

- 1.) Do Not Check In
- 2.) Check In
- 3.) Set Status to In Transit, do not check in

AND last one (which is what you will use) 4.) **SET STATUS TO IN TRANSIT, CHECK IN**

This puts a message on the record to tell everyone where it was checked in, when and where it is going. **Mail/Return the book to the appropriate library.** This is the responsible of each library as a member library in NorLN.

Once you check it in, it will ask you about charging the fines if one is owed If the patron is willing to pay, take the money, mark it paid and keep the money for your library.

**This will let all of us know where our books are so we can keep track of them. All items belonging to any library in the Northern Library Network can be returned to any of the libraries in the consortium. Each library in the consortium has the responsibility to accept all materials and to make arrangements for their return to the owning library.**

## Renewals and Fines:

\*Please Refer To the See Circulation Quick Start Guide Page 12-13

**Note:** Individual libraries will designate staff members with the authority to waive and/or override fines charges and replacement of library material charges

Member libraries agree that they will collect fines owed for other libraries materials. It will not be necessary to return collected fines to the owning library. Only the owning library can collect for lost or damaged materials. Call the owning library if a patron is returning lost or damaged materials, collect the money and remit to the owning library.

Books requiring a deposit may only be checked out or renewed in the owning library, or with the permission of the owning library.

If an obviously damaged book is returned to any library, that library will accept the responsibility for making a note of the patron who had the book before checking the book in.

**Member libraries can renew each other's materials if no override message comes up.**

## Online Renewals Procedure:

Patrons who log in to the card catalog can set up and access their online account by clicking in the upper right hand corner "Login".

Remind Patrons that online renewals must be completed before due date.

There are three self-explanatory questions to complete. Once logged in they can renew items, view their reading history, and see what items they have on hold.

If a patron forgets his or her pin number, they must call the owning library who will go into the patron screen and remove the letters and number from the field PIN. The Pin is encrypted. Patron may reset their pin from the login page of the Web Pac. They must have a current working email in their patron record.

Please advise the patron that they can now re-access the account and set up a new pin number.

**It is advisable for staff members to set up an account of their own and get familiar with it to better serve the patrons by having created and worked on their own account.**

**Note:** Please advise the patron that when setting up their account they will be asked to enter a pin number. This is a number that they create at the time of set up and can change later if needed.

## Overdue Materials:

Overdue materials and fines for each individual library or system are governed by their own policies.

Notification for overdue materials shall be the responsibility and province of the owning library

## Claims Return Procedure:

\*Please Refer To the Circulation Quick Start Guide Page 9-10

**PLEASE REMEMBER ONLY AUTHORIZED STAFF MEMBERS AT THE OWNING LIBRARY CAN CHECK IN CLAIMS RETURNED ITEMS OR WAIVE ANY FINES**

## Lost Items Procedure:

\*Please Refer To the Circulation Quick Start Guide Pages 10-11

Changing items to Lost and Paid should only be done by authorized library staff.

Please note that should an item be marked "Lost and Paid" and needs to be reinstated, this procedure can only be done by the CIRCULATION SUPERVISOR or his or her designated staff member.

## Holds:

\*Please Refer To the Circulation Quick Start Guide Page 12 & 16-20

**All NorLN members agree to abide by the WV ILL Standards.**

**Owning Library:** The library that owns the library material

Each member library agrees to set up a routing/exchange system for ILL's so that one library does not bear the load of all ILL's. All items belonging to any library in the Northern Library Network can be returned to any library in the consortium. Each library then has the responsibility to accept all materials and return it to the owning library in a timely manner.

*Revised 8/25/2017*