LIBRARIES ONLINE, INC. (LION)

CIRCULATION MANUAL

LION Circulation Policies and Procedures

Objective

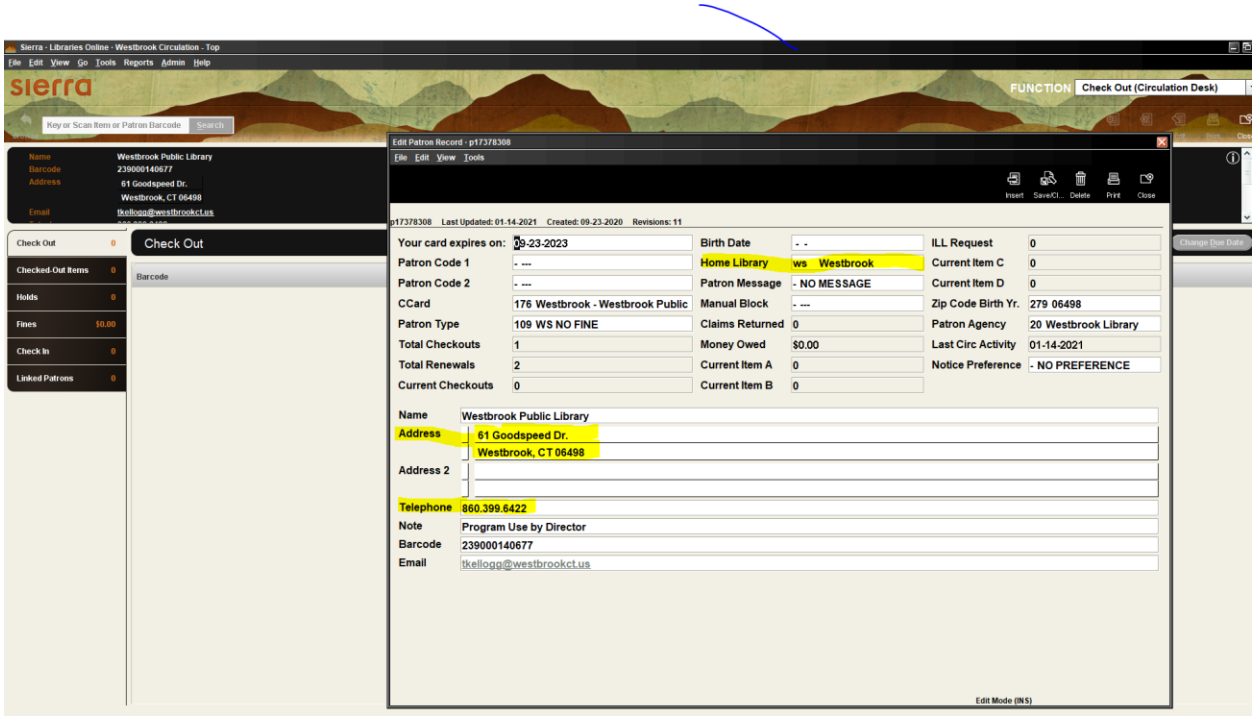
To articulate library circulation policies and practices that recognize the obligations of our shared integrated library system and lead to consistent, high quality customer service for all LION patrons.

Assumptions

- LION members acknowledge that all patron information recorded in LION's database is confidential.
- LION members actively support the sharing of resources between LION libraries.

Circulation Policies

- You may update patron record fields, when necessary, regardless of where the patron record was first registered.



  - Patron Registration renewals should be updated according to the library where the card is issued.

- You may merge duplicate records, even if the records were created by different agencies (libraries). Do not merge patrons whose registrations were created by Mitchell College.
- We subscribe to the state of CT record and financial retention policy.
    - (https://s3.amazonaws.com/ares2.southernct.edu/old-wysiwyg/recordsandinfo/uploads/textWidget/wysiwyg/documents/S3Fisc2010.pdf)
        - Purge expired patron records after 3 years regardless of fines and/or replacement fees.
        - Eliminate fines greater than 3 years old.
- You may enter messages and notes on any patron's record, and delete them when they are no longer applicable. Notes are for library staff only, and are not to be shared publicly. Each note or message must be followed by staff initials/library initial and date (ex: NW at GU 11/2/07). Do not delete messages and notes from another library without confirming with its circulation department. Please maintain a neutral, factual tone in all notes and messages.
- A patron may be contacted by phone, email, or mail by the owning library of borrowed materials that remain unreturned. Items may be returned to any public library. The patron will be advised that they must follow the lending library's return policy for non-traditional items.

- Libraries should respond to a "bounced email" when a hold pickup, overdue, or billed notice is repeatedly rejected by the email server. If the patron is registered at your library and you are not able to confirm or correct email address, add a message to the patron's record stating, "Email returned—please update email address" and date and initial. If you receive numerous bounced back alerts for the same patron from your library, please delete the email to stop further notices. Do not delete the email address if the patron is from another LION library; contact that library to report issue.

- Do not change the status to "claims returned" for items borrowed from another library.
    - If the patron prefers to pay by check, it should be made out to the "owning library," and given to the borrowing library, who will forward the check and paperwork to the appropriate library.
    - No library shall bill another library for missing materials.
    - A library may collect and keep overdue fines levied by other libraries for their patrons. Libraries may also waive overdue fines for materials from other libraries for their patrons.
- A library may collect payment for other libraries lost or damaged items or collection agency fee. However, payment to the owning library must be made in the form of a check or money order made out to that library. Patrons should be encouraged to pay online.
- Libraries should clear the debt out of the patron's record once patron pays bill.
- Libraries should encourage patrons to pay online for outstanding fees or the cost of lost material, particularly for other libraries.

- Do not delete predefined charges entered by other libraries. They are system wide.

- Book Club Provision: “Book Clubs” should be indicated in the notes field when placing book club holds.

- Damaged material is determined by the owning library.
- Material with insect infestations, such as bed bugs, should be refused at the circulation desk, with the patron directed to destroy it. If it’s an item from another library, please contact the proper circulation supervisor.
- Notes on item record for damaged material (“Noted broken spine on 1/2/19, GU”), to be done by Head of Circulation at the owning library or the owning library’s designee (ex. Cataloger). If not the owning library, please provide paper notice to borrower upon check out.
- Dispute resolution
    - Dispute of fines should be referred to the owning library.
    - If items from other libraries cannot be located and patrons claim to have returned them, notify the Head of Circulation about the situation. Do not change the status to “claims returned” for items borrowed from another library. Disputes of “claims returned” should be referred to the owning library.
- Handling old barcodes
    - Patrons should be asked if old card numbers are linked to digital content. If so, the old barcode should be preserved by adding an “x” at the end of the barcode number.
- Digital content
    - Overdrive blocks access at $25 or above in fees or fines. Borrowing rules vary for digital products, based on vendor licensing.
- Best practices recommendations [**These are not policies, but recommendations adopted by the LION Board from the Best Practices Task Force**]
    - Universal Sharing: Circulating items in the LION catalog may be reserved by patrons from any LION library. If a library decides that certain items in its collection may not be reserved (e.g., Express Collections), its own patrons would also be restricted from reserving those items. Universal Sharing does not apply to museum passes, equipment, or devices.
    - Uniform Loan Periods: DVDs circulate for one week with the option of one renewal. All other items circulate for three weeks with an option of two renewals. Loan periods for sets and special collections (such as equipment) are set by the owning library.
        - For Express Collection, the loan periods and number of renewals is selected by each library.
        - Items should not remain in Express collection for longer than 90 days.
    - Expired Cards: For patrons presenting an expired card at a non-home library, the expiration may be overridden as a one-time courtesy and the patron should contact the home library to renew their card.

    - Blocked Cards: User cards may be blocked for billed items. The recommended minimum for blocking is $25. Replacement costs for lost or damaged items are determined by the owning library.
    - Holds should be pulled Monday through Friday at a minimum and shipped according to each library's delivery schedule. Items should remain on the holds shelf for seven days.

- Procedural Recommendations
    - Holds marked null need a phone call to inform the patron their item(s) is available. For confidentiality reasons, no details about the hold(s) should be specified via voicemail or to anyone other than the patron with the holds.
    - Lost/left behind library cards can be mailed to the registered patron.
    - The "SHOUTBOMB" texting service is a notification option for patrons.
    - Courtesy email notices cannot by replied to by patrons.
    - Patron registration is set by issuing library.
        - Suggestions include:
            - Valid Picture ID
            - Proof of Residency
            - If a patron has passed away, put a note in the record if there are items outstanding. Waive all fines if the items are returned. If relevant, block the account from any collections activity. If the record has no outstanding fines or items, delete the record when the news of the death is confirmed. Please place a courtesy call to the patron's home library if the death is discovered by another LION library.

Circulation Working Group

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