**LARS Circulation Guidelines**

The LARS circulation committee will meet at least twice annually. The committee will look at all areas of circulation to set standards and make recommendations for all member libraries to follow in circulation. Recommended procedures will be approved by the LARS group.

**1. LIBRARY CARDS**

All library users need a MCLS member library card to check materials out.

Staff should use diligence in checking materials out to people without the physical card.

Each library can issue library cards to its users and set its own guidelines for issuing cards. Library users should have only one active card in the LARS system. Library cards are good at all LARS member libraries. A library may issue teacher, institutional, temporary, and virtual cards.

There is a uniform system of information listed on all card registrations.

**A. REGULAR LIBRARY CARDS (*Users: User Registration)***

Before registering a patron check for duplicate.

Each library sets their acceptable identification requirements.

If the patron is not listed, continue with User Registration to register the patron.

If the patron’s name is listed, check if it is actually the patron by confirming contact and demographic information.

For new users, scan new patron barcode and select the appropriate profile category:

* juvenile is 12 years old and younger
* young adult is ages 13-17
* adult is 18 and over

Select ok.

**Basic Info**

Use the Name as it appears on the person's identification -- do not use nicknames

Name must be in the Last, First and Middle fields

Do not use a period after the middle initial.

Use a - (dash) for hyphenated last names so they file correctly.

**DO NOT** use MR, MRS, MS or DR anywhere.

JR and SR, etc., goes after the FIRST NAME.  No comma or period (Example JOHN JR)

**Privilege:** will generate itself

**Demographics**

Select user category 1 and select the jurisdiction where the individual lives.

 Use <https://myvote.wi.gov/en-us/FindMyPollingPlace> to confirm jurisdiction

For patrons outside of MCLS, in user category 1 select the residing county (with or without library) and also fill in the appropriate user category 4-9. (See attached list)

**Enter birthdate**

**Address**

Use PO BOX (not P. O. Box, etc.)

When using PO BOX, the patron’s street address goes into the second address field, if available

Do not put a comma between CITY STATE

Telephone number needs area code and dashes in between (920-756-3215)

Add a **T** in front for text notification.

List email address if patron wants email notification

A second address may be listed for some patrons.

**Extended Info**

If child is a minor, list parents or guardian name and their date of birth.

Fill in Notify via field: EMAIL PHONE (for text and phone) PAPER

**Copy user**

Use this feature to clone information from an existing user to a new user.

Family members may be done this way.

Enter card of user you want to clone. Scan new bar code and make appropriate changes

Family registrations would require names, birthdates and guardian information, as listed above.

Wizard allows you to continue cloning users for as many as you need.

 **Remove User**

To delete user, card must be clean of charges and checked out items. When “clean,” delete user.

**Modify user**

When modifying a patron, check all address and contact information including the names of the card holder.

Respond to any messages placed on the card.

Delete or put old messages into history.

A replacement library card can be issued and the number scanned in as a part of the modifying process.

When giving a replacement library card with a different library prefix, please verify with the patron which library they want as the home library (it does not need to match the prefix). This affects the default library for picking up holds.

Patrons using Overdrive and/or Libby need to have accounts merged.

**Card renewal/ Extend Privilege**

Regular patron library cards expire every 18 months.

Address, contact information, and demographic information (User Cat) must be checked and updated as a part of the card renewal process.

**Notes on Library cards**

Always include the date, your library, and your initials in caps as a part of the message.

Make sure messages are clear so that individuals working in other libraries can understand.

**Material Limits**

A patron may have 75 items on hold at any one time on their card.

A patron may have 75 items checked out at any one time on their card.

Most Items may be renewed up to 3 times. Certain collections may have different terms. Items that have a hold on them may not be renewed.

**B. TEACHER CARDS**

A teacher or a parent who home-schools may be issued a teacher card.

A teacher card is to be used for curriculum-based materials and not for personal check outs.

Teacher cards include a 56-day (8 week) checkout time for books. All other material will follow the owning library’s circulation rules. Actual loaning period may vary by library.

There are no renewals on teacher cards.

Teacher cards expire annually.

A teacher card has a limit of 150 checkouts.

**Basic Info:**

To register a teacher, select teacher under profile name.

When listing their name Put (T) following their first name or middle initial if included. ( Smith, Mary E (T) )

**Demographics:**

Select user category 1 for the jurisdiction **where they teach**.

Use <https://myvote.wi.gov/en-us/FindMyPollingPlace> to confirm jurisdiction

For patrons outside of MCLS, in user category 1 select the residing county (with or without library) and fill in the appropriate user category 4-9. (See attached list)

**Enter birthdate**

**Address:**

List the school name, address and telephone number of the school where they teach.

Put their personal address information in the second address field.

All teacher cards require an email address.

**C. INSTITUTIONAL CARDS**

Any institution card may be issued to agencies such as senior housing, group homes, daycares and nursing homes.

Select Institution under profile.

List the name of the institution under LAST NAME.

List address and telephone number for institution.

A contact person must be listed under guardian. The person listed as guardian is financial responsible for lost or damaged goods.

If there are multiple patrons using one institutional card, all parties that may use this card must be added.

Institution cards will have a maximum 56-day (8 week) checkout time for books. All other material will follow the owning library’s circulation rules. Actual loaning period may vary by library.

There are no renewals on institution cards.

Institution cards expire annually.

An institution card has a limit of 150 checkouts.

When placing holds for materials, if the item is less than six months old, holds for that item must be owned by the requesting library and place an item specific hold for that item. **D.**

 **TEMPORARY CARDS**

A temporary library card is designed for patrons temporarily living in the Manitowoc-Calumet area.

The temporary library card will expire after 90days.

The number of items, types, and loan periods for temporary cards vary by library.

Temporary card holders

* will be subject to the same fines and fees as a regular card holder
* will be allowed access to the library’s internet computers
* will **NOT** be allowed to place **HOLDS**

**E. VIRTUAL CARDS**

Member libraries may partner with school districts to issue Virtual Library Cards. The Virtual Library Cards can be used at all LARS libraries.

Virtual card numbers are issued by the participating schools for use by staff and students to access computers, online databases, and to check out e-books, e-audiobooks, and digital magazines.

Virtual cards are issued at the beginning of each school year, and can be used through August 15th, following the end of the school year. They do not renew.

Virtual cards will be issued whether or not a student or staff member has a library card, and regardless of blocks on a personal record.

Virtual cards cannot be used to check out any physical materials.

**F. OUTREACH CARD**

An outreach library card is designed for patrons living in the Manitowoc-Calumet area. These are homebound or institution bound patrons.

The outreach library card will expire every 18 months.

Outreach cards will have a check out of 6 weeks checkout time for items other than videos/DVDs. Actual loaning period may vary by library.

There are no renewals on outreach cards.

An institution card has a limit of 75 checkouts.

When placing holds for materials, if item is less than six months old, holds for that item must be owned by requesting library and place an item specific hold for that item

**G. ILL CARDS**

An ILL library card is designed for loaning materials for interlibrary loans for libraries outside of the Manitowoc-Calumet Library System.

The ILL library card will never expire.

ILL cards loaning periods will follow WisCat best practices.

**Creating a New ILL Card**

Use the Name as it appears on the ILL paperwork

Select ILL under profile.

List the name of the institution under LAST NAME.

If city and name of library do not match, include name of city in brackets after library name.

List address and telephone number for institution.

**H. CLUB CARDS**

It is used for group homes that have members and/or staff that come in to check out materials in person.

Approved members and staff are listed on the account as able to check items out.

They are approved by the owner/director of the facility.

Use cannot always be monitored by library staff, due to self-check use.

The other use of this card is by Individuals that are not members of a group home, but have special needs and issues with maintaining due dates. Club Card status is determined on a case-by-case basis with library management approval.

A club card does not accrue fines.

The card will expire every 18 months.

Borrowing time for print and AV materials is 6 weeks, with one 6-week renewal.

The exception is DVDs. They check out for 7 days and may be renewed 3 times.

**Patrons turning 18 years old**

* All cards are set to expire when the patron turns 18 years old. Someone at each library receives an email with a report containing the names of these patrons, as they occur. The staff responsible at each library will put a note in the account to the effect that the patron has turned 18 and needs to come into the library to update ALL their information.
* Cards that in good standing (fines/fees **under** $10.00): If the patron is willing to be responsible for those fines/fees (they don’t need to pay them at this time) we can allow them to keep their card, staff will update the information, patron will sign a document acknowledging that they understand they are now responsible for all fines/fees on this card, and staff will remove guardian information.
* Cards that have fines/fees **under/over** $10 and the patron DOES NOT want to take responsibility for them, they can simply apply for a new card. In the juvenile card account staff needs to enter (JVL) after the first name or the middle name if that is in the account. Staff also need to add a note in the extended tab that says “DO NOT RENEW. INACTIVE JUVENILE ACCOUNT WITH BILLS. PATRON HAS A NEW ADULT ACCOUNT WITH AN ITEM ID OF 99999999999999.

**2. FINES, PAYMENTS & CREDITS**

**Fines**

Each library sets its own overdue and fine rates, as well as fee maximums.

Fines/fees may be paid at any MCLS library.

The library that collects the fine keeps the money for the fine.

**Payments for Loss or Damage**

A library that takes payment for lost/damaged/ missing parts or collection agency fees needs to pass this payment on to the owning library.

Receipt for Payment for Material Owned by Another Library (green sheet) and green envelopes have been created for the payment.

Follow directions that are listed on the Receipt for Payment for Material Owned by Another Library (green sheet) Exceptions to payments for loss/damaged/missing/agency fees, patron will be directed to the owning library.

**3. DAMAGED AND MISSING**

**Returned Damaged Items**

DO NOT CHECK IN any item that has visible damage.

 All material returned to Manitowoc will get checked-in by its Automated Materials Handler (AMH).

A damaged item should be returned to the owning library with a note about the damage.

 Follow directions that are listed on the Damaged Item tag (purple slip)

The owning library contacts the patron about damaged materials

**Returned Missing Parts**

DO NOT CHECK IN any item that has missing pieces.

 All material returned to Manitowoc will get checked-in by its Automated Materials Handler (AMH).

Receiving Library contact that patron about the missing part.

Keep the item at your library for one week.

If the part is not returned at this point, return the item to the owning library with Damaged Item tag (purple slip).

If a missing item has been checked in and a hold has been captured, find the name of the last patron and contact them about the missing part. Check the item out to this patron overriding the hold to prevent a problem with the hold. Give the patron one week to return the part. If the part is not returned at this point, return the item to the owning library with Damaged Item tag (purple slip). Do not check in. The owning library will have the opportunity to bill the patron for the missing item.

**Pick List Missing Materials**

If an item on the pick list is not found, search for the item a maximum of 3 days.

If the item is still not found, go under Items and click on Mark Item Missing.

If you are the only library owning the item or if all copies are lost, damaged, discarded or missing, you will need to notify the pick-up library to notify patron.

The Library receiving the notification has the responsibility of notifying their patron and for canceling the hold.

**Missing Items Card Clean-Up**

Libraries should review the “Missing Items” patron in a timely manner.

Check shelves for missing items.

* If item is located on the shelf, check-in under FINE FREE.
* If item is not located and the item is missing (maximum six months), discard item to remove from catalog.

**Items Missing From Holds Shelf**

If an item is missing from the holds shelf, once confirmed an item is missing it can be put in a missing status.

If this is done, the library that placed the item as missing needs to send a printout of the material information to the owning library.

**Claims returned**

Only an owning library can approve a Claims Returned request.

When a patron insists they returned an item, but the item cannot be found on the shelf of the borrowing and the owning library, an item may be put to Claims Returned.

Libraries will receive a report from the system administrator at 3 and 5 weeks about items that are in the claims return status.

* Libraries should check their shelves for these items.
* At 6 weeks the patron will be billed for the claims return item.
* If an item that was in claims returned has been found, libraries will have to manually reset the claims return of the patron.

Do Not reset the counter-it is meant as a way to keep track of how many times the patron has used this feature/possible abuse of this feature.

**4. HOLDS & PICK LIST**

A patron may not have more than 75 items on hold at any one time. The limit on a teacher card is 125.

**Holds on display items**

Try not to use other libraries’ materials for your displays. If you do need to, be conscientious not to use new or timely titles. If an item is on display at another library and it shows up on the owning library’s picklist, call the library that has it and ask for it to be checked in so the hold can be captured.

**Checkout of an Item with a Hold**

If a patron of your library selects an item for check out that has a hold on it (or appears on the holds list before it was retrieved from the shelf), the patron is entitled to check that item out.

Make sure it lists the hold as “unavailable” (located on the hold override popup screen).

If listed as “Unavailable”, override the hold and check the item out to the patron.

**Clear cancelled holds report**

Any items shown on the list need to be pulled from your holds shelf, checked in and routed to the proper library.

If an item is not found on the shelf, contact the patron to see if they have the item.

If they do, check it out to the patron.

If they do not have it, refer to missing items guideline

**Pick list/ onshelf holds list**

The pick list/ onshelf holds list must be run at least once each day that the library is open.

**MessageBee kickbacks**

MCLS staff will receive notifications of undeliverable messages. When necessary, they will add notes to the extended info tab as to why the notice failed to deliver. After the phone number is verified, please add another note saying it has been verified and delete the original note. Keep in mind that even though phone number has been verified, the patron might not be getting notifications.

**5. LIBRARY OF THINGS**

Library of things are non-traditional library items.

* Member libraries can customize transfer terms for Library of Things items, considering factors such as size, cost, and replaceability.
* MCLS will supply Library of Things labels to member libraries for items that cannot be transferred via delivery vans. These labels will instruct patrons to return items to the owning library's front desk.
* When Library of Things items are returned to a non-owning library, they will not be checked in but will instead be forwarded to the owning library for proper check-in processing. All material returned to Manitowoc will get checked-in by its Automated Materials Handler (AMH) unless handed to desk staff. **Regardless of route to status when checked in, ALL library of things material must be returned to the home library.**

**6. IN-TRANSIT ITEMS**

Items with holds for other libraries, except Manitowoc, need to have a transit flag placed in the item.

Items that are in transit to a library do not require a flag.

**7. INTERLIBRARY LOAN (ILL)**

Receiving an ILL for MCLS patrons:

ILL items for MCLS patrons should have a brief title record created.

Title line must start with ILL

When the ILL item is returned, check in and set item to discard.

Supplying an ILL to another library

 Process as a standard checkout

 Confirm and modify due date (if necessary)

 When receiving items back, process as normal patron check-in

**MCLS Contact Procedures for LARS Network/ILS Outages/Hung reports
(adopted 12-4-10)**

What to do when the WorkFlows system goes down

1. When WorkFlows goes down at your library, check if the Internet is also down. Check to see if you can log in to WorkFlows. If you cannot log into WorkFlows or experience Internet problems, contact MCLS using the contact information below.

2. If you decide to go to the offline check out mode, set up the offline session, using the default due date for books. Go to check out and scan as you normally do. Change due date to match loaning period of items (DVDs and Videos) before you scan them.

3. Do not check any items in while the system is down. Do not shelve any items that were returned on the day of the system going down, until the system is back up and functioning. MCLS will call the member libraries when the system is back up. PLEASE DO NOT LOG IN UNTIL YOU RECEIVE THE ALL CLEAR FROM MCLS. MCLS will run all necessary reports.

4. If an individual library is the only one down, they should contact MCLS when they are back up. MCLS will run the offline circulation report.

5. After an outage, MCLS will send out an email that explains the causes and effects of the outage.

6. When the system goes down for a longer period, follow the above procedure, but consider the following things:

* Check shelf before doing overdue lists for the next couple of weeks. This may be impossible for the larger libraries.
* Reconcile the holds shelf at least once. If a patron came in and picked up holds and the system does not reflect this, the holds will eventually expire and be forwarded to the next person in the queue. This might get messy.
* Remember the date the system went down when looking at patron records and be ready to forgive fines based on this date.
* Holds placed by patrons on the day of the outage may be affected. If their hold doesn’t show, the hold will have to be put back in and the hold queue may have to be shuffled.
* If a patrons says they returned an item, check the shelf and if found, check in using fine free.

Primary Contact: Margie Verhelst, ILS/IT Specialist

 Email: mverhelst@mcls.lib.wi.us

Cell: 920-889-4104

 Phone (home): 920-458-5279

Second Contact: Becky Scherer, Director

 Phone (work): 920-686-3051

 Email : rscherer@mcls.lib.wi.us

 Cell: 920-242-4596

Third Contact: Kate Verhelst, Administrative Assistant

 Phone (work): 920-686-3052

 Email: kverhelst@mcls.lib.wi.us

 Cell: 920-331-0523

Fourth Contact: Amy Eisenschink, LARS Consultant

 Phone (work): 920-686-3059

 Email: aeisenschink@mcls.lib.wi.us

 Cell: 920-905-2697

During the business day: 8 a.m. to 5 p.m.

Margie is the primary contact for any ILS or Internet outages when they occur. **Please contact Margie via cell, then home phone.**  If Margie does not respond to your call within 15 minutes, then call the second, third, and fourth contacts listed.

When Margie is unavailable, the MCLS staff will be the first contact for any ILS or Internet problems that occur. Please contact the staff in the above order when reporting a problem.

System staff will contact SirsiDynix Support for network support assistance.

MCLS staff will contact the member libraries as needed to inform them of the problems, the solutions they are attempting, and the estimated time to restore ILS or Internet service. From this information, the libraries can decide whether they will circulate offline or not.

If Margie plans a scheduled outage, she will contact all member libraries by e-mail prior to the scheduled outage. Her messages will include the date and time of the outage, the reason for the outage, the expected length of time for the outage and how you will be notified when ILS or Internet service is restored.

In the rare circumstances that the MCLS office does not have phone service or e-mail service, contact the staff via the cell phone numbers listed.

Before 8 a.m. and after 5p.m. on weekdays and weekends

Your primary contact is Margie by cell or home phone. If she cannot fix the problem immediately, then she will contact the MCLS staff or SirsiDynix Support for network support assistance. If Margie does not respond to your call within 15 minutes, then call the second, third, and fourth contacts listed.

The MCLS staff person will call the member libraries to inform them of the problems, the solutions being tried, and the estimated time to restore the ILS or Internet service.

Approved April 11, 2024

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