



**PINES Circulation Policies and
Procedures Manual**

Version 2011.05

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2010 PINES Circulation Policies & Procedures Project

The PINES Circulation Policies & Procedures Revision Project began in February 2010, and completed its work at the May 2010 meeting of the PINES Executive Committee. The working group for this project consisted of members from the Staff Training/Documentation Subcommittee, along with a few volunteers who showed particular interest in the project.

Completely Revised

This manual is based on a 2003 version of the PINES Circulation Policies and Procedures Manual that contained complete descriptions of procedures in PINES' automation system. This document has been brought up-to-date with references to Evergreen. The first phase of the Revision Project also revisited the complete archive of PINES Executive Committee meeting minutes from 1999 to 2010 to make sure that all decisions were somehow accounted for.

New Annotations

The policy has been edited with bracketed inline annotations (e.g., “[2009.12]”) which refer to the year and month of the Executive Committee meeting at which the policy was decided. Only meetings where an action item resulted in a policy addition or change are referenced. Discussion items or PINES staff reports are not referenced.

New Versioning System

Each version of this documentation will be marked with the year and month of the most current PINES Executive Committee meeting. This ensures that staff members using the documentation for reference know how current the policy is.

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PINES Circulation Policies and Procedures

PINES libraries will have uniform circulation policies and procedures. According to the PINES Executive Committee, this is a condition of participation [1999.05]. The procedures outlined below represent the decisions of the Executive Committee. Many procedures will remain under local control, varying with the specific situation of each library or library system.

I. Patron Accounts

Policies

Library cards are free to all residents of Georgia. Persons who attend school, own property or are employed full-time in Georgia are eligible for a free PINES card. Patrons of both PINES and non-participating Georgia public libraries may receive a PINES card. Users from non-participating Georgia libraries shall have the same privileges as PINES users. Most PINES cards are valid for 2 years [1999.05].

Property owners who do not reside in Georgia are required to show proof of Georgia property ownership, such as a tax bill or deed. Non-Georgia residents who are employed in Georgia or attending school in Georgia are required to show proof of that employment or enrollment.

Out-of-state cards are available to persons living outside Georgia who do not meet the above criteria for a \$25 annual fee, payable at the time the card is issued. A temporary card is available for a \$12.50 fee and is valid for 6 months.

Signing a PINES card application denotes acceptance of responsibility for all fines and fees for lost or damaged materials.

There is no minimum age for a child to receive a PINES card. A parent or legal guardian may register a child [1999.05]. Parent or guardian must show proper ID to register a child. A parent or guardian must sign the application for all children under 18. Signing a child's PINES card application denotes acceptance of responsibility for all fines, lost or damaged materials.

Proper identification must be presented to register [1999.05].

A library card is required in order to check out materials [1999.05, 2010.09].

An applicant for a new card is required to provide proper ID, which includes current, local address. Acceptable ID for receiving a PINES card (3 choices):

a) photo ID showing current local address, OR

- b) photo ID and one item from approved list (see below) showing current, local address (if photo ID does not have correct address), OR
- c) TWO (2) items from approved list showing current, local address.

Acceptable ID includes:

- valid driver's license
- valid voter registration card
- valid matricula consular [2004.08]
- checks with pre-printed addresses
- a utility bill
- tax receipt or other piece of mail that shows the user's name and present address.

Original documents are required. The registering library is responsible for ensuring that a correct address is obtained [2005.08].

Social Security Numbers are not used in PINES [2006.11].

Applicants for a card must complete and sign an application form, available at any PINES participating library's circulation desk.

Procedures

Create a New User Record

1. To avoid creating a duplicate record, library staff should search for the patron's name in the Evergreen patron database (Search -> Search for Patrons or F4) before entering a new patron record. The "All PINES Libraries" option should be chosen. If an identical name is found, compare the address and other identifying information on the screen with the card application to determine if the patron is already registered in the system.

If you find the patron already has a record in the system, DO NOT create another record.

2. If the patron's information is outdated, use the Evergreen User Editor to update information. See *Modify User procedures*.
3. If a patron has lost his or her card, issue a replacement card. The charge for a replacement card is \$2 [1999.10].
4. If the name is NOT found in the database, use Evergreen User Editor (Circulation -> Register Patron or Shift + F1) to create a new patron record. The PINES user record can contain as many addresses as necessary, and notes and comments that display to all PINES facilities. It must contain the user's first name, the user's last name, the library card barcode, a unique user ID (by default, the library card barcode), primary identification information, the user's library, the user's profile group, the account's expiration date, a mailing address, and a response to the Voter Registration Survey question. There are also fields for specifying a user's county of residence and whether they live within the city limits.
5. All fields in red are required fields. Birthdate is also a required field. [2010.02]. All others are optional. Staff should not enter "placeholder" information (e.g. "N/A", "No Middle Name", "NMI" or the like) in any field when registering a patron. Please avoid punctuation such as quotation marks (i.e., James "Jimmy" Jones) or parentheses (i.e. Martin (Alan) Smith) to indicate nicknames or preferred names. Unnecessary spaces, misplaced apostrophes, and other typing errors can cause the search for a patron to return incorrect results.
6. Evergreen uses the patron's birthdate to distinguish between adult and juvenile patrons. Color coding is used in Evergreen to indicate patrons under the age of 18 [2006.05].

User Identification

Evergreen User Editor

Note: required or invalid fields are marked with color [View Errors](#)

1. User Identification	Barcode <input type="text" value=""/>
2. Contact Info	Username <input type="text" value=""/>
3. Addresses	Password <input type="text" value=""/>
4. Groups and Permissions	Verify Password <input type="text" value=""/>
5. Statistical Categories	First Name <input type="text" value=""/>
6. Surveys	Middle Name <input type="text" value=""/>
7. Finish	Last Name <input type="text" value=""/>
	Suffix <input type="text" value=""/> <small>- Pick -</small>
	Alias <input type="text" value=""/>
	Date of Birth <input type="text" value="1980-01-01"/> <small>(YYYY-MM-DD)</small>
	Juvenile <input type="checkbox"/>
	Primary Identification Type <input type="text" value="Required"/>
	Primary Identification <input type="text" value=""/>

[Forward](#)

- **Barcode** - Staff should scan the library card barcode to enter.
- **Username** - The username field will be populated with the library card number by default. Users may later choose to change their username to a text name via the OPAC.
- **Password/Verify Password** - The password will be set to the last four digits of the first phone number provided (see p. 6). If the patron does not have a phone, staff may provide a temporary PIN number to the patron. Staff will notify the patron that they will need to set a new password for themselves via the OPAC as soon as possible.
- **First Name/Middle Name/Last Name** - Staff should enter names with an initial capital letter and lowercase letters following (e.g., Jacky or Young). Use apostrophes in names as appropriate. (e.g. O'Connor). Because of the large size of the PINES patron database, staff are encouraged to enter full first, middle and last names. No nicknames should be added or listed.
- **Suffix** - The suffix of names with Sr., Jr., III, should be entered in this field. They may be manually typed or selected from one of the options in the dropdown menu supplied.
- **Alias** – The Alias field is provided as a privacy measure for patrons who would not like their actual name to be used on hold slips (this is configurable by your Local System Administrator). PINES/GPLS staff is not recommending the use of this field at this time.
- **Date of Birth** - Staff may enter the birthdate manually in the format YYYY-MM-DD, or may use the supplied calendar tool to enter the date automatically.
- **Juvenile** – This checkbox will automatically be checked if the birthdate entered indicates that the patron is under 18 years old.

- **Primary Identification Type** - Staff may choose either Drivers License or Other from the dropdown menu. PINES prohibits the use of patron Social Security Numbers for identification [2006.11].
- **Primary Identification** - Staff should enter drivers license number in the specified format (GA-XXXXXXXXXX), substituting the appropriate state abbreviation (e.g., FL, AL, SC, TN) for non-Georgia drivers licenses.
- **Parent or Guardian** – This field will appear if the Juvenile checkbox is checked and is used to enter the name of the juvenile’s parent or legal guardian.

Contact Info

Evergreen User Editor

Note: required or invalid fields are **marked with color** [View Errors](#)

1. User Identification	Email Address	<input type="text"/>
2. Contact Info	Daytime Phone	<input type="text"/> Example: 123-456-7890 or 123-456-7890 ex123
3. Addresses	Evening Phone	<input type="text"/>
4. Groups and Permissions	Other (Cell Phone)	<input type="text"/>
5. Statistical Categories	Home Library	Georgia State Library Collection <input type="button" value="v"/>
6. Surveys		
7. Finish		

[<](#) [Forward >>](#)

- **Email Address** - Staff should encourage PINES users to provide email addresses for the benefits of automatic hold, overdue, and reminder (pre-overdue reminder) notices. (NOTE: if an email address is entered, the patron will receive overdue notices, as well as holds notices, via email. Final overdue notices will be mailed via U.S. Mail as required by Georgia law).
- **Daytime Phone** - Day telephone number including area code. This will be the patron's preferred phone number of contact and will be used for automated telephone notifications. The last four digits of this (or the first number provided on this form) will be the patron's initial PIN for online account access.
- **Evening Phone** - Night telephone number including area code.
- **Other (Cell Phone)** - Telephone number including area code.
- **Home Library** - Users will have system-wide borrowing privileges yet belong to a "home" library. Staff will designate the home library when they enter the user record in PINES. This field will default to the PINES location at which the user account is being entered.

Addresses

Evergreen User Editor

Note: required or invalid fields are marked with color [View Errors](#)

Address	Within City Limits	Valid	Mailing Address	Physical Address																				
<table border="1"><tr><td>Label</td><td><input type="text"/></td><td>Zip</td><td><input type="text"/></td></tr><tr><td>Street 1</td><td colspan="3"><input type="text"/></td></tr><tr><td>Street 2</td><td colspan="3"><input type="text"/></td></tr><tr><td>City</td><td><input type="text"/></td><td>County</td><td><input type="text"/></td></tr><tr><td>State</td><td><input type="text"/></td><td>Country</td><td>USA</td></tr></table> <p style="text-align: center;">Delete this Address</p>	Label	<input type="text"/>	Zip	<input type="text"/>	Street 1	<input type="text"/>			Street 2	<input type="text"/>			City	<input type="text"/>	County	<input type="text"/>	State	<input type="text"/>	Country	USA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
Label	<input type="text"/>	Zip	<input type="text"/>																					
Street 1	<input type="text"/>																							
Street 2	<input type="text"/>																							
City	<input type="text"/>	County	<input type="text"/>																					
State	<input type="text"/>	Country	USA																					
Create a New Address																								

< Forward >>

Address Entry:

- **Label** - Staff may add a short description of the address (e.g. “Lake House”). For addresses that were imported from PINES’ previous automation system, this field will be marked “LEGACY ADDRESS.”
- **Zip** - Standard 5- or 9- digit postal codes are accepted. City, State, and County information are automatically populated for Georgia addresses when this field is entered (NOTE: the automatically entered information should be checked for accuracy).
- **Street 1** - The number and street for the address.
- **Street 2** - Apartment, Lot, Suite, or additional address information.
- **City** - City of residence.
- **State** - State of residence.
- **County** - County of residence (optional, but auto-populated by Zip entry).
- **Country** - Country of residence (default USA).
- **Within City Limits** - Based on patron-provided information, staff may uncheck this box or leave it checked (checked by default).
- **Valid** - Checked by default. May be edited if an address is found to be invalid.
- **Mailing Address** - Selected by default. An additional address may be selected if necessary.
- **Physical Address** - Selected by default. An additional address may be selected if necessary.

Additional Addresses:

- Click on Create a New Address to add. Evergreen allows the creation of as many addresses as necessary.
- Addresses may be deleted as necessary. NOTE: Staff may not delete the primary address.

Groups and Permissions

- **Profile Group** - The patron profile determines the user's loan period and fine rates. One of the profiles below will be assigned to each user.
 - **Patron** is the default profile in PINES. Privilege is two years. This user will be blocked after 10 overdue items or if a total of \$10 or more is owed. User is billable [1999.05]. User may have up to 50 holds at a time. This profile can also be used for users who live out-of-state but work or own property within Georgia.
 - **Class** - no longer used in PINES [2003.02].
 - **Friend** is a library user who is a member of a local Friends of the Library organization. Privilege is one year. User is billable, and has same use parameters as the Patron profile.
 - **NonResident** is for persons who reside in the state of Georgia, but outside of the areas served by PINES libraries. Privilege is one year. This user will be blocked after 10 overdue items or if a total of \$10 or more is owed. User is billable. User may have up to 50 holds at a time.
 - **OutOfState** is for users who reside out-of-state. Privilege fee is \$25. Privilege limit is 1 year. This user will be blocked after 10 overdue items and if a total of \$10 or more is owed. User is billable. User may have up to 50 holds at a time.
 - **Outreach** is for outreach users such as homebound users. This user may have an unlimited number of items checked out simultaneously. The user presently has no blocks assigned to it. User is not billable. User may have a total of 15 simultaneous holds.
 - **PaymentPlan** is a temporary status for individuals making payments on fees that would otherwise automatically go to collections. A library system can notify the

collection agency not to pull patrons with this profile. The profile should be returned to a permanent status after full payment of the fee. User has identical privileges to Patron profile [2008.11].

- **Restricted** is a user with some type of restricted library use. Privilege limit is 1 year. This user may have only 2 items checked out simultaneously. This user will be blocked after 1 overdue item and if a total of \$0.01 is owed. User is billable. User may have up to 5 simultaneous holds.
- **StaffNoPerm** is a user who has staff member privileges on borrowing items, but does not have staff-level permissions [2009.05].
- **Temp** is a person who resides in the area for a limited period of time, but lives permanently outside of the state. Privilege limit is 6 months. Privilege fee will be ½ (\$12.50) of the fee charged for OutOfState users. This user may charge up to 5 items simultaneously. This user will be blocked after 1 overdue item and if a total of \$0.01 is owed. User is billable. User may have up to 5 simultaneous holds.
- **TempRes6** is a library user 18 years of age or older. User has identical privileges to Patron profile, except that privilege expires after 6 months, and card must be renewed at that interval. This profile may be used for college students or military personnel who move frequently. There is no fee to receive this card.
- **TempRes12** is a library user 18 years of age or older. User has identical privileges to Patron profile, except that privilege expires after 12 months, and card must be renewed at that interval. This profile may be used for college students or military personnel who move frequently. There is no fee to receive this card.
- **Trustee** is a library user who is a member of a Library's Board of Trustees. Privilege is 2 years. User is not billable. Same use parameters as Patron profile.
- **Account Expiration Date** - This field is automatically set based on the Profile Group, but may be edited by staff.
- **Internet Access Level** - Defaults to Filtered, but may be set to Unfiltered or No Access.
- **Active** - If unchecked, the patron is no longer considered an active PINES patron and will no longer be included in statistical reports. Checked by default. See *Patron Inactivity*.
- **Barred** - See *User Barred* section.
- **Set as Family or Group Lead Account** – Unchecked by default.
- **Claims Returned Count** - shows the number of items marked Claims Returned that the patron has accrued. After accruing 5 Claims Returned items, the patron may not have any more items set Claims Returned [1999.10]. This count may be reset.
- **Alert Message** - Staff may enter an alert message that will appear when the account is retrieved.

Statistical Categories

Evergreen User Editor

Note: required or invalid fields are marked with color [View Errors](#)

Statistical Category Name	Owner	Value
	STATELIB-L	-- None Selected -- or <input type="text"/>
Legacy Profile	PINES	-- None Selected -- or <input type="text"/>
Non-English Primary Language	PINES	-- None Selected -- or <input type="text"/>

1. [User Identification](#)

2. [Contact Info](#)

3. [Addresses](#)

4. [Groups and Permissions](#)

5. **[Statistical Categories](#)**

6. [Surveys](#)

7. [Finish](#)

[Back](#) [Forward >>](#)

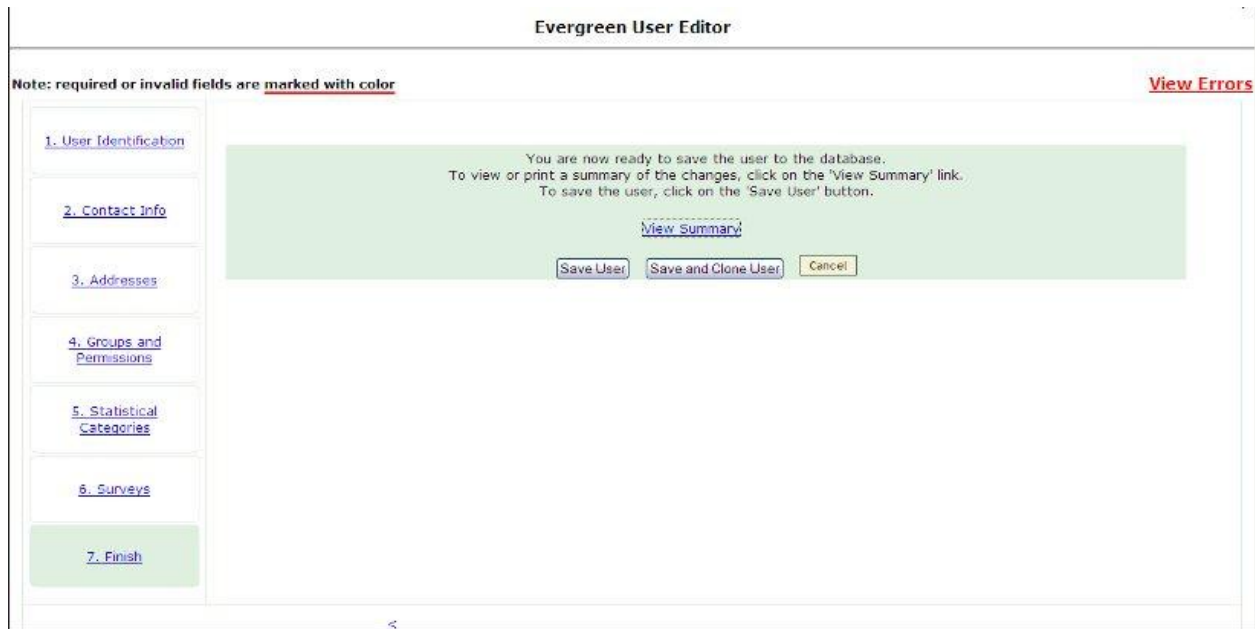
Statistical Categories - The purpose of statistical categories is to establish controlled vocabulary that describes an individual user’s special characteristics for statistical analysis of circulation and registration. Other than the “Non-English Primary Language” category, which has been determined to be a universal statistical category in the PINES patron record [2006.05], PINES does not require the use of statistical categories. They may be created by individual library systems as needed by the Local System Administrator.

Surveys

The screenshot displays the 'Evergreen User Editor' interface. At the top, it says 'Evergreen User Editor' and 'Note: required or invalid fields are marked with color'. On the right, there is a 'View Errors' link. The main content area is titled 'Voter Registration : Patron voter registration survey' and contains the question 'Would you like to register to vote today?'. A dropdown menu is open, showing options: 'None Selected', '-- None Selected --', 'Registered', 'Unregistered', 'Not Registered', 'Not Registered to Vote', and 'Not Registered to Register'. The dropdown menu is highlighted in red. On the left side, there is a navigation menu with seven items: '1. User Identification', '2. Contact Info', '3. Addresses', '4. Groups and Permissions', '5. Statistical Categories', '6. Surveys', and '7. Finish'. The '6. Surveys' item is highlighted in green. At the bottom, there are navigation buttons: '<' and 'Forward >>'.

- **Surveys** - PINES uses the Survey function to electronically record patron voter registration responses to be in compliance with Georgia law. Surveys may be created at the local library system level by the Local System Administrator.

Finish



The screenshot shows the 'Evergreen User Editor' interface. On the left is a vertical navigation menu with seven items: '1. User Identification', '2. Contact Info', '3. Addresses', '4. Groups and Permissions', '5. Statistical Categories', '6. Surveys', and '7. Finish'. The '7. Finish' item is highlighted in green. The main content area has a title 'Evergreen User Editor' and a note: 'Note: required or invalid fields are marked with color'. In the top right corner, there is a red link labeled 'View Errors'. The central part of the screen is a green box containing the text: 'You are now ready to save the user to the database. To view or print a summary of the changes, click on the 'View Summary' link. To save the user, click on the 'Save User' button.' Below this text are three buttons: 'View Summary', 'Save User', 'Save and Clone User', and 'Cancel'.

When you are finished entering the patron's information, click the Save User button and ask the patron to sign on the signature strip on the PINES card. It is a local decision on the part of each Library System whether the PINES card will be given to the user at registration or be mailed [1999.10]. Consult your circulation supervisor for the policy at your library.

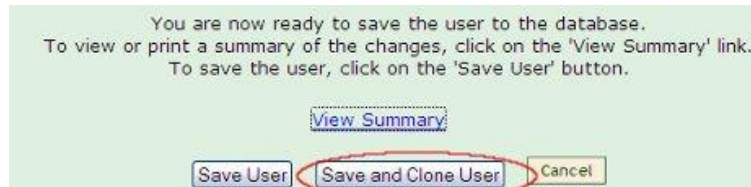
GEORGIA CONFIDENTIALITY LAW: The Georgia Confidentiality Law (O. C. G. A. 24.9.46) prohibits the disclosure of any patron information, including titles checked out, amount of fines/fees owed, and phone numbers/addresses. All PINES library staff recognize the strict confidentiality of library records, and shall not disclose any information regarding library patrons unless legally compelled. If proper legal documents are presented, a Library Director or designee must approve the decision to release confidential records.

NOTE: The Executive Committee moved in the May 2009 meeting to issue a statement reminding all PINES libraries of the confidentiality of patron information after reports that the PINES patron database had been used for purposes other than PINES transactions initiated by library patrons. This statement has not yet been released for inclusion in this version of the PINES Circulation Policy and Procedures [2009.05].

Temporary Borrowing Privileges

Persons who will be in Georgia for less than 6 months, and reside outside Georgia, may be issued a temporary card. Privilege limit is 6 months. Privilege fee is ½ the fee charged for OutOfState cards (\$12.50). This card carries limited borrowing privileges. Temporary cardholders may check out up to 5 items simultaneously. To register a temporary borrower, choose the profile name “Temp” when entering the registration. There are also two additional temporary borrower profiles in PINES, TempRes6 and TempRes12, which are described in the *Groups and Permissions* section.

Duplicate Registrations

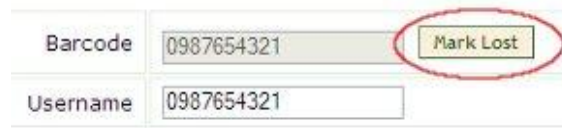


When more than one member of a family is registering at the same time, the Save and Clone User function can be used.

- Register the first family member using the procedure outlined above.
- At the Finish screen, click Save and Clone User
- Follow the steps in the User Identification and Surveys sections
- Make any necessary edits to the remaining information
- Remember to enter each individual’s email address

Lost/Stolen Card

If a patron reports his or her PINES card lost or stolen, ask for ID to verify the name of the patron. Use the patron search function (Search -> Search for Patrons or F4) to search for the user’s record, retrieve the patron record, click Edit, then click the Mark Lost button in the User Identification screen and assign a new card to the patron.



The lost card fee is \$2; the patron may pay at the time the new card is issued, or the fee may be placed on the patron's record (according to local policy).

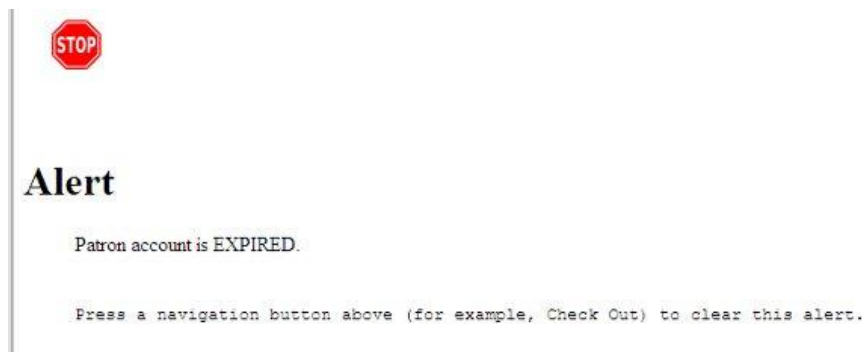
NOTE: If the patron uses his/her card number as his/her username for account access, consult with the patron as to whether the username should be updated to the new card number.

Edit User

To edit a user record, retrieve the patron record (Circulation -> Check Out Items [or F1], then scan the library card barcode), then click Edit to take you to the Evergreen User Editor. Refer to the Create a New User section for details about each screen/field.

Card Renewal

Most PINES cards are valid for 2 years. The system will notify staff that a card has expired by placing an alert on the patron record.



At that time, staff should use the Evergreen User Editor to verify the patron information (address, phone number, etc) in the record by asking to see current identification, and updating the information as needed. This is a good time to add an e-mail address to the user's record, and confirm that the user's full name is entered. Note that the account expiration date must be manually changed based on the patron profile. Refer to the Create a New User section for details about each screen/field.

The patrons must resolve all outstanding fines and fees in order to renew her/his card. [2009.12]

NOTE: If a User's account is set to expire during the proposed renewal period for items, Evergreen will not allow a renewal past the patron expiration date. Check the user record and update it accordingly.

When PINES Patrons Move to Another PINES Library System

If the patron moves from one PINES library system to another, change the home library of the patron from the old library system to the new library system and update address and telephone information in the patron record. The patron may keep the same card, however it is recommended that staff replace the patron's card with one from the new library system, as electronic reference database access is allowed by patron card number. Although it won't count as a new registration, the patron will now be included in reports of all patrons registered in the new library system.

If a patron moves from one library to another within the same system, the home library should be changed in the patron record and the address and telephone information should be updated. The system looks at home library, not the card prefix, in determining where a hold/loan should be sent.

Georgia law mandates that library staff offer patrons the opportunity to register to vote when receiving or making changes to their library accounts.

Incorrect Addresses

Inevitably, with the large number of patrons in the PINES database, there will be an increase in mail being returned due to incorrect addresses. Instead of continuing to print and mail notices to these users, the patron address of users who have returned mail should be marked as invalid. These users will then be omitted from the overdue notice reports.

1. In order to identify the users who need corrected address information, the "valid" checkbox beside the address (Checkout -> Edit -> Addresses) in the user record must be unchecked. Staff should do this whenever a returned mailer is received.
2. The patron record will be marked with an (Invalid Address) message, which appears under the patron name in the Checkout interface.
3. Once this procedure is under way, each library may periodically wish to run a report of users with invalid addresses, in order to determine which items are still checked out and presumed lost, in case those items should be discarded.

Patron Inactivity

PINES will mark users "inactive" in the patron database three (3) years after the last use of a PINES library card, if the card has not been blocked [2002.12].

A PINES patron account is considered "inactive" if the following conditions are met:

- a patron has no items currently out
- there are no bills on the patron's account
- there has been no activity such as circulations, renewals, check-ins, payment of bills, or placement of holds for 3 or more years.

In keeping with current ideas about what constitutes library “use,” PINES also defines a user as “active” when she/he accesses any of the following non-circulation-related services with her/his library card:

- use of library computers (unless “circulated”)
- in-library wifi access
- e-books or audiobook downloads
- GALILEO databases (whether or not authenticated through the OPAC).
- logging into a user account in Evergreen

“Activity” has been redefined by PINES to include the actions listed above, and that any of these should serve to keep a PINES card “active” [2008.11].

II. Circulation

Check-Out/Renewal

Policies

A patron must present a card in good standing to borrow materials. A patron's card will be blocked, and no services may be obtained with it if the patron owes \$10 or more in unpaid fines and/or fees [2011.05]. Blocked services include renewals [2009.05, 2009.09] and hold request placement [2008.02]. Delinquent borrowers who have not reached these limits may still borrow materials; the system operator will be notified that the patron is delinquent.

A PINES card is required at all times and at all libraries for all transactions [2006.11], with the following exceptions:

- when an item is in hand, no library card is required in order to renew the item [2007.02]
- when an item is in hand, no library card is required for payment of fines [2007.02]

A card is required for renewals or bill payment if neither the cardholder nor the item is present [2007.02].

In most cases, a maximum of 50 items may be charged simultaneously on a PINES card [1999.05], [2002.12].

Materials circulate for varying periods of time; see the *PINES Circulation Matrix* (<http://pines.georgialibraries.org/pines-circulation-matrix>) for details on circulation rules.

Procedures

Basic Checkout Session

A normal checkout session would proceed as follows:

- Staff member selects Check Out Items from the Circulation menu (F1).
- Patron presents his/her library card; staff member scans card, determines if patron is in good standing. If the patron is not in good standing, see *User Status*.
- Staff member scans barcodes of items presented for checkout.
- Staff member clicks the "Done" button to prompt printing of checkout receipt.
- Staff member should verbally remind patron of due dates.

If a patron *forgets his/her PINES card*, he or she can:

- Return home to retrieve it. Materials may be held for the patron.

- Purchase a replacement card for \$2. The procedure for Lost/Stolen Cards should be used in reissuing a card.
- Photo ID is not accepted in lieu of a library card in PINES.

User Status

User blocked

If a patron's record is blocked due to excessive overdue materials or fines, the patron's name will appear on a purple background, and status indicators will appear in parentheses beneath the name:


A screenshot of a user record in a library system. The name 'User, Example' is highlighted in a purple box. Below the name, there are four status indicators in parentheses: '(Maximum Bills)', '(Has Bills)', '(Invalid Date of Birth)', and '(Invalid Address)'. The 'Maximum Bills' indicator is highlighted in a darker purple, indicating it is the cause of the block.

In this example, Maximum Bills is the cause of the block. Staff will not be able to check out items to the patron until the reasons for the blocked account are resolved.

As of Evergreen 1.6.1.8, blocks are recorded in the Messages section of the patron's account. Blocks are automatically removed when the reason for the block is resolved. Blocks may also be manually removed by highlighting the block(s) and going to Actions for these Penalties -> Remove from Patron. The Apply New Penalty button is nonfunctional as of Evergreen 1.6.1.8.

User barred

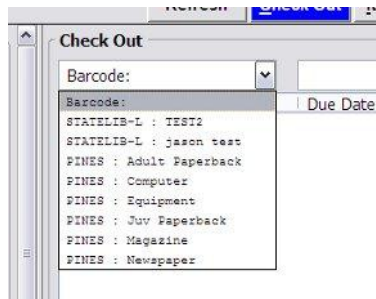
Barred is a status that is manually set by library staff. A barred patron's name will appear on a red background, and the reason for the barring will appear in an alert message.

A screenshot of a user record in a library system. The name 'User, Example' is highlighted in a red box. Below the name, there are five status indicators in parentheses: '(Barred)', '(Alert)', '(Maximum Bills)', '(Has Bills)', and '(Invalid Date of Birth)'. The 'Barred' indicator is highlighted in a darker red. Below the status indicators, there is a yellow box with a black border containing the text '▼Alert' and 'Theft of library materials.'

It is PINES policy that only the library that barred the patron can unbar said patron. If a barred patron presents items for checkout at other than the library that barred the patron, he/she should be directed to speak with that library to resolve outstanding issues and restore library privileges. Each Library Director or designee shall decide the circumstances under which a patron may be barred, and must enter the reason for the barring in an alert message on the patron account. This status should be reserved for serious offenses, such as theft of library materials [1999.10].

Non-Cataloged Item Checkout

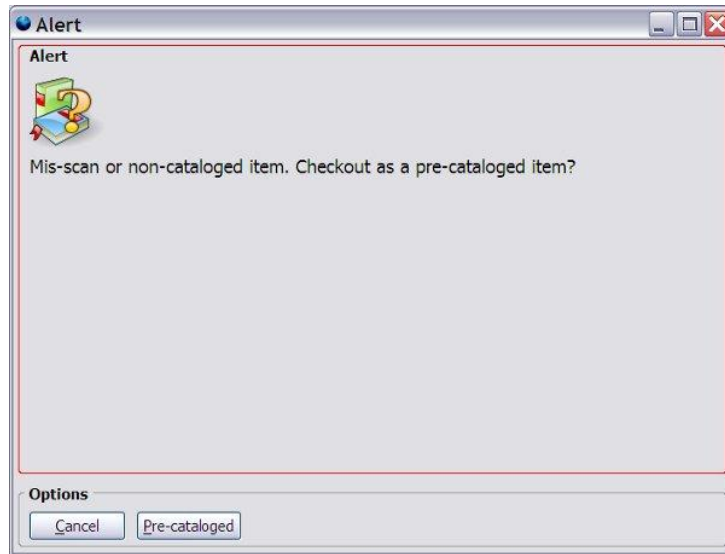
Many libraries do not have bibliographic records for paperback books, circulating magazines, or equipment. The non-cataloged circulation function should be used to record a count of these items. Staff members should select the appropriate non-cataloged item type from the dropdown menu, and then enter the number of items to be checked out at this time.



These items will be checked out on the patron's account and will be given a due date, but will accrue no fines. The patron account will show the non-cataloged items as checked out on the patron's account until the due date has passed. Non-cataloged item types may be added locally by the Local System Administrator.

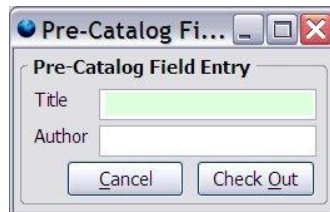
Checkout of Pre-cataloged Items/Creating Brief Records

All items borrowed by patrons should have a barcode and be checked out through Evergreen. If an item is brought to checkout without a barcode or if the barcode on an item is no longer in the database, it should be added/re-added to the database on the spot, using the pre-cataloged item function to allow its circulation. For non-barcode items, staff should apply a spare barcode to the item and scan it. Assigning ad hoc/temporary or shortened barcodes is not recommended, as this can cause other items in other libraries to accidentally be scanned. The following screen will appear:



NOTE: When this message appears when scanning a barcoded item, *staff should re-scan the item*. When it is determined that the item's barcode is not in the database, follow the same steps as staff would for non-barcoded items for creating a brief record.

Click Pre-cataloged, and the following screen will appear and allow staff to enter the title and author of the item:



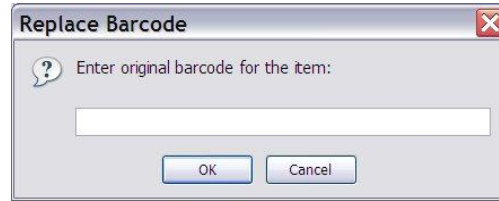
When the item is returned, it must be forwarded to the Cataloging Department for full entry into the database. Brief records should not remain in the system for more than one circulation. PINES member libraries will be asked to periodically clean up brief records by deleting them or creating full records [2002.05].

Circulating Cataloged Items Without a Barcode

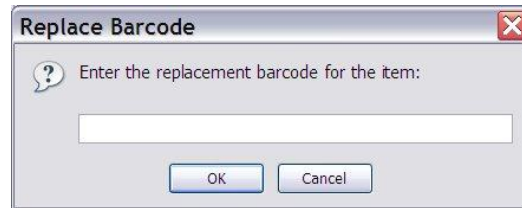
When circulating a cataloged item whose barcode is no longer attached, staff should use the Replace Barcode (Circulation -> Replace Barcode) function, taking the following steps:

1. The staff member should attempt to locate the barcode for the item using a catalog search (Search -> Search the Catalog or F3).

2. When the barcode is located, staff should copy (Ctrl-C) it from the catalog screen and paste it into the Enter original barcode for the item box:



3. Then staff may enter the replacement barcode number and click OK to apply the change:



Proxy Borrowing

Any user may present another user's card to check out materials. Library staff should remind all patrons at the time a card is issued that they are responsible for all items checked out on that card, and that lost cards should be promptly reported. PINES libraries also have the ability to check out items on hold to an authorized proxy user (often husband or wife), as opposed to the user who originated the hold, while maintaining the integrity of the holds queue.

Policies regarding Proxy Borrowing and procedures for administering this feature are at the discretion of the individual library systems [2001.11]. The authorized proxy is not required to present the originator's card, but the authorization for proxy permission should be noted in the Notes field. Because all library records are confidential in nature, PINES library staff must be aware that authorization of the originating user (the person placing the hold) is required for proxy checkout for all persons over 18 years of age.

Materials placed on hold by juveniles, as with any and all parts of the juvenile's patron record, are accessible and may be checked out by parents or legal guardians without prior authorization.

Renewals

Most items can be renewed twice. After items have been renewed 2 times, they must be returned and made available for all library patrons. If the item is not returned it will be considered lost by the patron that has it checked out. Certain categories of materials are not eligible for renewal. If

a hold request has been placed on an item, it may not be renewed. Selected staff will have the authority to force the renewal in special circumstances.

To accomplish a renewal, the patron must present his/her PINES card or read his/her PINES barcode number to staff over the phone. Staff is encouraged to ask for a second item of identification, such as address or telephone number, to verify the identity of the caller. Items will not be renewed with name only. Patrons may renew their items via the My Account feature of the OPAC.

Discard/Weed Status

The Executive Committee moved in September 2009 to add a status of Discard/Weed to the circulation dropdown menu. This feature has not been developed in Evergreen as of this release of PINES Documentation [2009.09].

Audio-Visual Materials/Age Protection

Audio-visual items and any age-protected items (that should be available only to the owning region's patrons) are only available for holds by patrons registered to the owning library/region, AND are only available for pickup within the item's owning system. [2007.02]

The Executive Committee has approved a special reciprocal arrangement for Dougherty County Public Library and Lee County Library regarding holds restrictions in all formats (except new items). Lee County and Dougherty County patrons are allowed to place their own holds on either system's restricted formats with the exception of age-protected items. This exemption only affects DCPL and LEE home library patrons. [2007.12]

Check-In

When checking in materials, it is VERY IMPORTANT to watch the screen as each barcode is scanned to be sure the scan is registering and to be aware of on-screen messages and directions. Messages directing the staff member to send items to another location or library, or directions for items on hold are visually displayed on the screen at check-in, and audible alerts will assist the operator in noticing important messages.

Basic Check-In

Choose Check In Items from the Circulation menu (F2) to check in materials. As each barcode is scanned, information on the checked-in item will appear on the screen. Staff may scan each barcode or type it and click Submit:



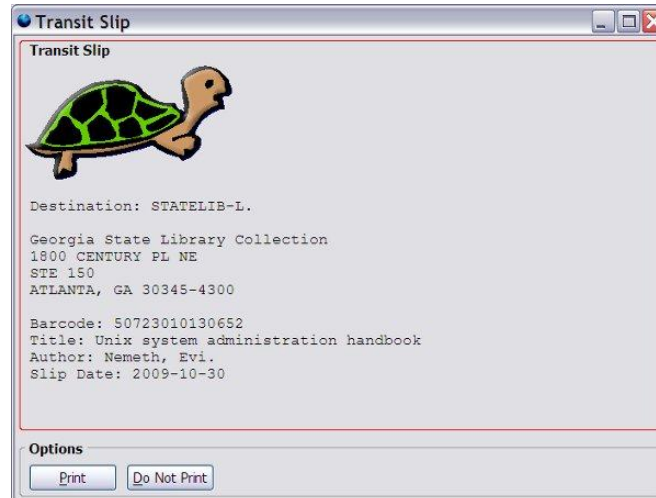
Changing the Default Check-In Date

Staff may change the date for the check-in by altering the Effective Date field for purposes of checking in items from the bookdrop first thing in the morning using yesterday's date, or in other circumstances in which the check-in date needs to be changed. Enter the desired check-in date, and check in items normally. The date must be entered in the format YYYY-MM-DD:



Transit Items

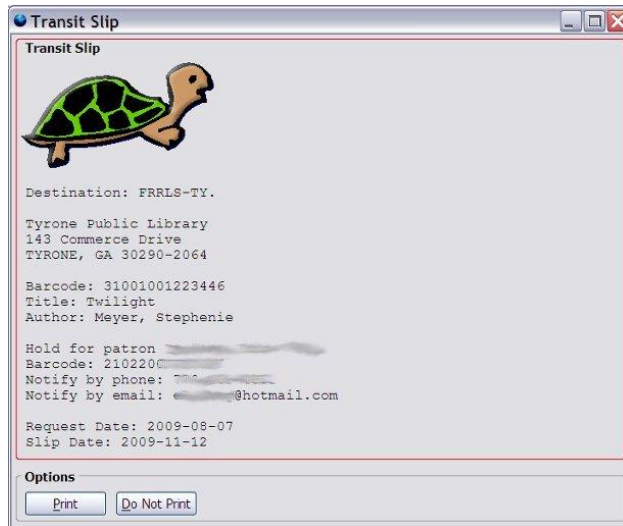
Transit messages with instructions to send the item to another library are displayed on-screen:



In appropriate circumstances, transits may be aborted by circulation staff with the relevant permission settings by going to Actions for Selected Items -> Abort Transit.

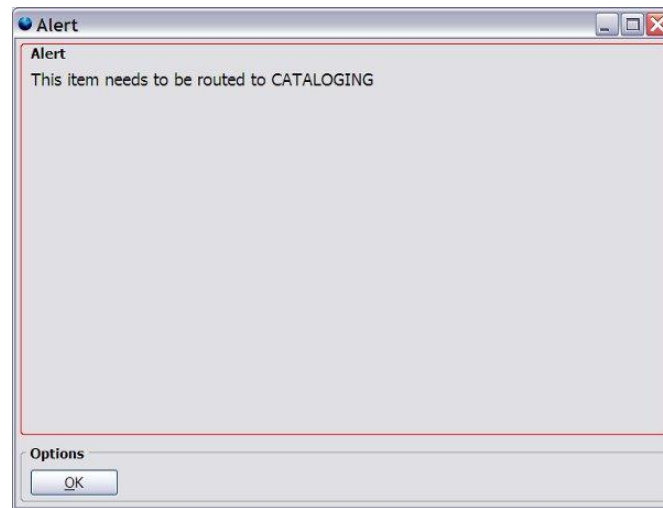
Hold Items

Likewise, messages that an item is on hold are also displayed.



Pre-cataloged Items

When pre-cataloged items (see *Checkout of Pre-cataloged Items/Creating Brief Records*) are checked in, the item status is changed to Cataloging, and a message to route the item to cataloging is displayed:



Staff Client Settings for Check-In

Staff members may need to ensure that the Auto-Print Hold and Transit Slips checkbox is checked when appropriate. This is unchecked by default, but the preferred setting is retained by the staff client once selected:

Auto-Print Hold and Transit Slips

PLEASE NOTE: The Auto-Print Hold and Transit Slips feature does not work properly in Evergreen 1.6.1.8. Please notify your Local System Administrator if you are having difficulty with this.

The Check In interface provides a number of features for customizing check in or allowing the printing or export of checked-in items:

List Actions ▾ Print List Trim List (20 rows) Strict Barcode Ignore Pre-cataloged Items

- **List Actions** - opens a menu of possible actions for the list of checked-in items
 - **Copy to Clipboard** - allows user to copy selected fields from a given row to the computer clipboard
 - **Print List CSV** - opens a new window with comma separated text drawn from the contents of the window and opens print dialog
 - **Copy List CSV to Clipboard** - opens a new window with comma separated text drawn from the contents of the window and copies it to the computer clipboard to be pasted into an external program
 - **Save List CSV to File** - creates a new file to be saved to disk with the contents of the window in comma separated values format
 - **Save List Configuration** - saves the column configuration as selected by the column picker
- **Print List** - opens a print dialog window to print the contents of the screen. Good for when a patron wants a receipt of items returned. Start with a fresh check in screen, then print the list when the patron's items have been checked in.
- **Trim List (20 rows)** - limits the list to 20 rows, regardless of how many barcodes are input. Checked by default.
- **Strict Barcode** - if checked, barcode field will only accept 13-digit Codabar barcodes. Barcodes in any other format, even if legitimate, will not be processed. Unchecked by default.
- **Ignore Pre-cataloged Items** - if checked, the alert message to route pre-cataloged items to cataloging will not appear. Unchecked by default.

III. Bills

Fines/Fees

To encourage the prompt return of materials, the PINES libraries have established a schedule of fines and fees as penalty to those patrons who fail to return materials by their due dates. The schedule of fines and fees can be found with the PINES Circulation Matrix (<http://pines.georgialibraries.org/pines-circulation-matrix>).

Overdue Notices

Overdue notices are sent as a courtesy from the libraries. Failure to receive notices does not exempt patrons from the responsibility for library materials or overdue fines. Notices are generated and mailed centrally. 10-day overdue notices are sent via email to those patrons with email addresses in their user records [2007.02]. The final overdue notice is always sent via US Mail.

The PINES Executive Committee has approved the use of a telephone notice service to call patrons concerning overdue notices. This will be an intervening step before sending a paper notice for patrons without email addresses present in their user records [2011.05].

The first overdue notice is generated at 10 days past the due date of an item.

The final notice, which assesses the replacement cost of overdue materials, is sent at 30 past the due date.

NOTE: The Executive Committee voted that PINES will issue 7- and 14-day overdue notices to patrons. Mandatory budget reductions for GPLS in summer 2009 necessitated a change to a single 10-day notice to replace the 7- and 14-day notices. The 30-day notice remains intact, as required by Georgia law [1999.10], [2009.09].

Pre-Overdue Notices (“Preminders”)

PINES sends a “pre-overdue” notice or “prereminder” via email 3-days prior to the due date of an item. This is an email-only service and staff should encourage patrons to provide an email address for this benefit [2007.05]. The wording for the pre reminders follows [2008.05] - the items between % and in braces [] are placeholders for the actual information displayed when emails are sent:

```
To: [% user.email %]  
From: [% sending_address %]  
Reply-To: [%sending_address %]  
Errors-To: [%sending_address %]  
Subject: Courtesy Notice
```

[% user.first_given_name %] [% user.family_name %],

This is a courtesy reminder from the library that the following item(s) will be due on : [% date %]

[% list of items %]

You may request renewal online at <http://gapines.org> using your PINES username and password, or by calling your local PINES library and providing your PINES library card barcode.

Contact your library for more information:

[% library name and address %]

[Note: not all items can be renewed. Items returned after the due date may be subject to fines]

Thank you

Paying Fines/Fees

PINES fines may be paid at any participating library. Overdue fines will be retained by the collecting library, regardless of the original lending library [1999.10]. Returned materials which are owned by other PINES libraries will be promptly returned via the PINES courier service. Patron accounts in collections status must be paid at the referring library.

Patrons may pay all or a portion of overdue fines. Patrons are not allowed to carry a credit balance of fines on their account in lieu of a refund [2006.05].

PINES library systems may implement “fine-free” or “food-for-fines” library promotions. These will apply only to the initiating library systems. The participating library/system must make it clear to the public that these promotions are local and do not apply to other PINES libraries. [2001.11].

Lost Items

A patron may inform staff that an item is “LOST”. Staff should mark the item LOST in Evergreen to create a bill for the lost item. The price of the item, plus an optional processing fee of up to \$10, will be assessed to the patron’s card. Overdue fines on the item will be automatically voided when marking an item lost [2002.09]. Lost items may be paid for at any PINES library. Payments for lost or damaged materials will be returned to the owning library. These payments must be remitted monthly [1999.10].

When a item that has been marked lost and paid for by the patron is returned, Evergreen will automatically create a refund of the item price *minus* the overdue fines owed on the item (that is to say that Evergreen restores the automatically voided overdue fines).

NOTE: Evergreen will only automatically void and restore fines associated with the circulation that resulted in the lost item. The system does not void/restore overdue fines related to other circulation transactions on an item.

Some PINES libraries have contracted for services with collection agencies. A fee for collection agency services may be added to a lost item record, and will be listed with a bill reason of Referral. Please see the *Collection/Materials Recovery Agencies* section

Long-Overdue Items

The PINES Executive Committee decided in May 2006 that all PINES libraries' items roll to LongOverdue status at 180 days after initial checkout [2008.05]. This decision was based on information presented at that meeting that “[i]n the Evergreen software, it will be possible to ‘roll’ an item that has been overdue for a long period of time into a status of LOST, with the cost of the item being charged to the user’s record” [2006.05]. This feature is still under development in the Evergreen software at the time of this policy revision.

Recovering Lost Items and Refunding Payment

If a lost item is found and returned within 6 months of payment [2003.02], a refund of the paid replacement value, minus the overdue fines which have accrued, will be given [2002.09]. The processing fee (if applicable) will not be refunded. The “found” materials may be returned to any PINES library, with the understanding that the owning library will be the final authority on whether the material is in acceptable condition for return. The owning library will issue a refund check to the patron via U. S. Mail. The refund check will be payable to the library cardholder on whose record the materials were circulated [1999.10].

Returned Check Fees

Returned check charges should be billed to the user's account. Payment is due from the patron that caused the loss to the library that incurred the loss [2011.05].

Claims Returned Items

Claims returned is when both a library system and a patron are unable to agree on the location of the disputed item thus creating a ‘draw’ or ‘amnesty’ for the item [2010.02]. If a user claims to have returned materials that still show as checked out, the material may be marked with a Claims Returned date. Overdue fines stop accruing as of the date entered in the Claims Returned field. Use the Actions for Selected Items -> Mark Claims Returned function in Checkout -> Items Out tab to perform this operation. A user may have up to 5 Claims Returned items on his/her record at any time.

Unrecovered Debt

As a measure to bring library accounting practices in line with Governmental Accounting Standards Board regulations, the Executive Committee has decided to adopt a procedure for marking fines/fees owed by patrons for over three years “unrecovered debt.” This status will be applied at the per-circulation-transaction level to such fines and fees. This feature of Evergreen is still under development at the time of this policy revision [2007.09], [2007.12].

Collection/Materials Recovery Agencies

Some PINES libraries contract with collection/materials recovery agencies to collect outstanding fines and fees or to recover lost materials. The following policies apply to this arrangement within PINES:

- Fees associated with trying to collect debts or track down long-overdue materials should be returned to the owning library [2003.05].
- Once collection action is undertaken, the user must contact or return materials to the owning library to settle the problem and pay any fees and to add "COLLECTION" as a Bill Reason [2003.05].
- A library may send any patrons to collections who have overdue materials as a result of transactions originating from the library in question, regardless of item ownership or patron home library [2007.05].

Default Item Price

The Executive Committee decided that \$25.01 be set as the default item price. \$25.01 was chosen to be readily recognizable as a default price. This feature has not been developed in the software at the time of this policy revision [2007.12].

Receipts and Receipt Printers

Receipt printers will be attached to circulation workstations. These printers generate a 3” paper receipt much like that of a cash register.

Workstations can be set to automatically print receipts at check-out, listing items checked out during that session. Printing setup may be found in Admin (-) -> Local System Administration -> Printer Settings Editor. Printing properties must be set for each individual workstation.

Missing Items

Missing is a status assigned to items which show as available in the library catalog, but which are not found on the shelf. When an item is not found on the shelf, a staff member should manually

mark the item Missing in Evergreen using the Item Status editor. The library should then run a regular report of items in Missing status and delete them as they see fit.

IV. Holds

Intra-PINES Lending

If a patron wishes to borrow an item that his/her library does not own but is owned by other PINES libraries, the patron may place a hold on that item. PINES libraries will print a report of items on their shelves which have hold requests and will pull those items listed and scan them into the Checkin Interface (Circulation -> Capture Holds). The screen will instruct staff to route the item to another PINES library to fill a hold, and the item will be put into transit. When the destination library receives the item, it will be scanned and placed on the holds shelf for pickup. Once the item is scanned at the pickup location, a holds notice via email will be generated for accounts with email addresses or staff will be prompted to telephone the user with holds notification.

The Holds report should be retrieved and processed promptly each morning at each library site. Items listed should be pulled from the shelf, packaged and sent within 24 hours. The holds list is regenerated periodically to ensure that the list is fresh whenever a library retrieves it during the day. Holds that are not processed within 24 hours will be re-targeted to another library if possible. For 5 days, the hold targeter will only select items within the pickup library. After 5 days, the hold may be filled by any copy within PINES [2007.12]. Borrowed items should be promptly sent back to the owning library or on to the next library to fill a hold. Items should be appropriately packaged to protect them from damage while in transit [2008.11].

Placing Holds

1. Materials will retain the same circulation period regardless of whether the patron is local or from another PINES library. When thinking of intra-PINES lending, it is important to remember that a PINES patron is a patron exactly like your local patron. Intra-PINES loans are not ILLs – they are simply circulations like any other. The PINES Executive Committee has ruled that circulations between PINES libraries must be free of charge to system libraries and to patrons [2008.09].
2. Holds may be placed on items which are on the shelf in any PINES library. If a patron presents the on-hold item for checkout before it is retrieved for the requesting patron, the in-house patron with item in hand receives preference; a circulation supervisor will override the hold and check out the item to the in-house patron. The requesting patron will be next in line for the item.
3. Most patrons may place 50 holds at any given time on their account [2006.11]. Certain user categories are restricted to different number of holds limits.
4. Under normal circumstance, PINES does not allow intra-PINES loans on the following item categories:

- Audiobooks
- CDs
- DVDs
- Bestsellers
- Equipment
- Microforms
- New Books
- Reference
- Reserve
- Software
- Toy
- Videocassettes
- Video Games
- Leased Materials
- Outreach
- Deposit (monetary).

Items with these item types may be borrowed within regional library systems. Leased items will be treated the same as any other book with regards to holds [2006.11]. For other item types, a title-level hold will find the first available copy of the title in PINES to fill the hold. The Holds report will first look for an available copy in the patron's pickup library, then in the pickup library's system; if no copy is available, it will then select a copy from another PINES library.

5. Patrons may place their own holds via the OPAC, and may select their pickup location and notification method. The software will refuse holds requests which do not conform to PINES policies. Patrons may choose any pickup location for holds. Patrons may not place multiple holds on a single title record, but staff may place multiple holds on a single title record on behalf of the patron (e.g., for a book club) [2006.05].
6. The vision of the PINES statewide library card included as a key component the ability for patrons to see and borrow library materials from all participating public libraries in the state. Our goal is maximum access for all patrons, while realistically addressing the logistics of moving materials around the state. Member libraries have agreed that PINES membership would not relieve libraries of the responsibility for purchasing the materials needed to meet the demands of local patrons.
7. Patrons whose PINES cards are expired will not be allowed to place holds until the card privilege is renewed. Please note that the Evergreen software does not currently enforce this policy automatically.

Intra-PINES holds

Procedures

- The holds pull list is retrieved every weekday (M-F) at each PINES library (Circulation -> Pull List for Hold Requests). The report lists all on-shelf items for which there are holds for all PINES libraries.
- Locate each item on your list on the shelves. If an item should be on the shelf but cannot be found, staff should mark the item is missing (Circulation -> Show Item Status by Barcode -> Actions for Selected Items -> Mark Item Missing). This will force the hold to “roll” to another copy within PINES. It will also allow you to generate a report of missing items in your library.
- If you receive an inappropriate holds request on your list (for an item type that is not eligible for intra-PINES loans), contact the requesting library via e-mail or telephone and ask them to remove the hold. Please **DO NOT** ignore such holds, as they will continue to appear on your list each day until they are resolved.
- When you have gathered the items on your list, scan each barcode into the Checkin Interface (Circulation -> Capture Holds). Be sure your terminal is connected to a receipt printer. As you trap each item, a receipt will be printed, telling you where to send the item.
- Prepare each item for sending via the PINES courier. Items should be appropriately packaged to protect them from damage while in transit [2008.11]. All materials should be treated the same as each library would want its own materials handled [2009.05].
- A database of PINES mailing addresses in mailing label format will be provided to each library; you can print out the addresses needed on demand. For convenience, the Evergreen receipt templates for transit items can be configured to print the library policy name and courier code for each item. All items should be mailed within 24 hours of receipt of the holds report.
- When you receive items from other PINES libraries to fill holds, check in each item when it arrives, and place it on your holds pickup shelf. As the item is checked in, a holds pickup receipt will be printed.
- Holds notices will be emailed within an hour of when the item is available for those patrons who have email addresses in their user records. Each library is responsible for contacting users who need to be telephoned regarding available holds. No paper notices will be mailed centrally.
- Each library may decide how long to keep its own items on the holds pickup shelf; however, items from outside the local library system should be held on the holds shelf for a maximum of seven (7) open business days [2009.05], then returned to the owning library or forwarded to the next person waiting in line for a hold.
- A staff member may change the pickup library location of a hold once it is on a holds shelf ready for pickup. This is only allowed for hold items that have the pickup library changed to a unit within that regional library system. [2008.05]. Once the pickup location has been changed, the item needs to be scanned on the checkin screen to place it in transit to the correct pickup library.

- When an item you have borrowed to fill a hold is returned, send it back to the owning library, or to the next library with a hold (the transit slip will direct you) within 24 hours of its return.
- Holds will also be captured in the normal course of checking in items. These holds should be mailed out within 24 hours as well.
- Staff must never give preference to one patron over another regarding holds. The PINES code of ethics requires that all libraries respect the integrity of the hold queue, and share equitably.
- Hold requests expire after 6 months with the option for staff or patron to make it an earlier or later date [2008.02].

Suspending Holds

A hold can be placed on an item and then suspended until a later date by staff or the patron. A date of activation will be required when the hold is suspended. This will allow the patron to stop his/her holds for a set amount of time. The hold will not trap until the activation date unless it is activated manually by staff or by the patron.

Holds Notices

Hold notice wording [2007.09] - the items preceded by \$ and in curly braces { } are placeholders for the actual information displayed when emails are sent:

```
To: ${EMAIL_RECIPIENT}
From: ${EMAIL_SENDER}
Reply-To: ${EMAIL_REPLY_TO}
Subject: Hold Notification
${EMAIL_HEADERS}
```

```
${DATE}
```

```
${LIBRARY}
${LIBRARY_ADDRESS}
```

```
  ${PATRON_NAME}
  ${PATRON_ADDRESS}
```

```
Hold Available for Pickup
```

```
The item you requested is available for pickup from the
Library. Contact the Circulation Desk to check out the
item.
```

```
Title: ${TITLE}
Author: ${AUTHOR}
Call Number: ${CALL_NUMBER}
```

Copy Barcode: \${COPY_BARCODE}
Copy Number: \${COPY_NUMBER}

Contact your local library to determine how long this item will be held for you.

Thank you.

Processing Holds

When an item on hold is scanned at check-in, the following steps should take place:

- The check-in screen will display the patron's name and pick-up location for this item.
- The receipt printer will print a transit slip, which should be placed in the item.
- The item should be placed in the library's designated spot for items to be sent to other PINES libraries.
- If the item is to be picked up at the check-in library, the item should be placed in the appropriate location for holds waiting to be picked up. The system will generate a hold notice to be emailed to the patron if an email address is located in the patron record.

V. Other Account Information

PINES Staff Accounts

PINES library staff members are granted passwords for access to the PINES database via the Evergreen staff client. PINES member libraries are required to change PINES passwords once a year [2002.09], and at the library's discretion when a key staff member with high-level access leaves, or if an employee leaves under hostile circumstances [2005.08].

In the event of presentation of a National Security/FBI letter requesting information under the PATRIOT ACT, any PINES Director may give his/her system password access to PINES [2006.01].

Special Users

The previous vendor's automation system offered special "library use" users to facilitate internal library functions. This practice is *not* recommended in Evergreen and the use of library user accounts for purposes other than regular circulation may cause problems, especially system slowness.

User Services

PINES users have access to selected areas of their personal patron record, including checkouts, fines/bills, holds placed and other information.

Access to the personal patron record is initially available only through the PINES library card number and personal identification number (PIN) for each user, as all library records are confidential in nature. The assigned PIN will be provided to the user at the time of library card registration, and staff will advise the patron to login to the OPAC as soon as possible, as the action of initial login will force the user to select an alternative PIN or text password. The user may also select a text username to use in lieu of the library barcode for OPAC access.

The PINES patron has the ability to change his/her own PIN/password after accessing the record with the correct library card number and PIN/password. Some patrons may need staff assistance in remembering the current PIN/password to access their patron record.

Users may reset their PIN in person at any PINES participating library with proper identification. PINs may not be obtained over the telephone [2001.11]. As of Evergreen version 1.6.1.8, patrons are now able to reset their passwords from the My Account page [2006.05].

Appendix A: PINES Library Policy Names by Library System June 2011

Athens Regional Library System	Athens-Clarke County Library	ARL-ATH
Athens Regional Library System	Bogart Library	ARL-BOG
Athens Regional Library System	Bookmobile	ARL-BKM
Athens Regional Library System	Danielsville/Madison County Library	ARL-DAN
Athens Regional Library System	East Athens Community Resource Ctr.	ARL-EAST
Athens Regional Library System	Lavonia Carnegie Library	ARL-LAV
Athens Regional Library System	Lay Park Community Resource Ctr.	ARL-LAY
Athens Regional Library System	Lexington/Oglethorpe County Library	ARL-LEX
Athens Regional Library System	Lyndon House Art Resource Ctr.	ARL-LYNDON
Athens Regional Library System	Pinewoods North Community Learning Center	ARL-PWOODS
Athens Regional Library System	Royston Library	ARL-ROY
Athens Regional Library System	Sandy Creek ENSAT Resource Ctr.	ARL-ENSAT
Athens Regional Library System	Watkinsville/Oconee County Library	ARL-WAT
Athens Regional Library System	Winterville Library	ARL-WINT
Bartram Trail Regional Library	Bookmobile	BTRL-BKM
Bartram Trail Regional Library	Mary Willis Library	BTRL-MWL
Bartram Trail Regional Library	Taliaferro County Library	BTRL-TCL
Bartram Trail Regional Library	Thomson-McDuffie County Library	BTRL-MCD
Brooks County Public Library	Brooks County Public Library Headquarters	BROOK-HQ
Catoosa County Library	Catoosa County Library	CCL-RING
Chattooga County Library	Summerville Branch	CHAT-SMRVL
Chattooga County Library	Trion Public Library	CHAT-TRION
Cherokee Regional Library	Chickamauga Public Library	CHRL-CHICK
Cherokee Regional Library	Dade County Public Library	CHRL-DADE
Cherokee Regional Library	LaFayette-Walker County Library	CHRL-LW
Cherokee Regional Library	Rossville Public Library	CHRL-ROSS
Chestatee Regional Library System	Dawson County Library	CRLS-DAWSN
Chestatee Regional Library System	Lumpkin County Library	CRLS-LMPKN
Clayton County Library System	Forest Park Branch	CLAYTN-FOR
Clayton County Library System	Headquarters Library	CLAYTN-HQS
Clayton County Library System	Jonesboro Branch	CLAYTN-JON
Clayton County Library System	Lovejoy Branch	CLAYTN-LOV
Clayton County Library System	Morrow Branch	CLAYTN-MOR
Clayton County Library System	Riverdale Branch	CLAYTN-RIV
Coastal Plain Regional Library	Carrie Dorsey Perry Memorial Library	CPRL-B
Coastal Plain Regional Library	Cook County Library	CPRL-C
Coastal Plain Regional Library	Headquarters Library	CPRL-R
Coastal Plain Regional Library	Irwin County Library	CPRL-L
Coastal Plain Regional Library	Tifton-Tift County Public Library	CPRL-T
Coastal Plain Regional Library	Victoria Evans Memorial Library	CPRL-A
Conyers-Rockdale Library System	Nancy Guinn Library	ROCK-NG
Desoto Trail Regional Library	Baker County Library	DTRL-BAKR
Desoto Trail Regional Library	Blakely-Maddox Memorial Library	DTRL-BLAK
Desoto Trail Regional Library	Camilla-DeSoto Trail Regional Library	DTRL-CAMI
Desoto Trail Regional Library	Jakin Public Library	DTRL-JAKN

Desoto Trail Regional Library	Pelham-Pelham Carnegie Library	DTRL-PELH
		DTRL-
Desoto Trail Regional Library	Sale City Library	SALECITY
Dougherty County Public Library	Central Branch	DCPL-CEN
Dougherty County Public Library	Northwest Branch	DCPL-NW
Dougherty County Public Library	Southside Branch	DCPL-SS
Dougherty County Public Library	Tallahula Branch	DCPL-TAL
Dougherty County Public Library	Westtown Branch	DCPL-WT
East Central Georgia Regional Library	Appleby Branch Library	ECGR-APPBY
East Central Georgia Regional Library	Augusta-Richmond Co. Public Lib.	ECGR-MAIN
East Central Georgia Regional Library	Burke County Library, Waynesboro	ECGR-BURKE
East Central Georgia Regional Library	Columbia County Library	ECGR-CCO
East Central Georgia Regional Library	Diamond Lakes Branch Library	ECGR-DIAML
East Central Georgia Regional Library	Eucler Creek Library	ECGR-EUCHE
East Central Georgia Regional Library	Friedman Branch Library	ECGR-FRMAN
East Central Georgia Regional Library	Harlem Branch library	ECGR-HARLM
East Central Georgia Regional Library	Lincoln County Library	ECGR-LINCN
East Central Georgia Regional Library	Maxwell Branch Library	ECGR-MXWLL
East Central Georgia Regional Library	Midville Branch Library	ECGR-MIDVL
East Central Georgia Regional Library	Sardis Branch Library	ECGR-SRDIS
East Central Georgia Regional Library	Wallace Branch Library	ECGR-WALLC
East Central Georgia Regional Library	Warren County Library	ECGR-WARRN
Elbert County Public Library	Bookmobile	ECPL-BKM
Elbert County Public Library	Bowman Branch	ECPL-BWMN
Elbert County Public Library	Elbert County Public Library	ECPL-ECPL
Fitzgerald-Ben Hill County Library	Fitzgerald-Ben Hill County Library	FBHCL-MAIN
Flint River Regional Library	Barnesville-Lamar County Library	FRRLS-BA
Flint River Regional Library	Fayette County Public Library	FRRLS-FA
Flint River Regional Library	Griffin-Spalding County Library	FRRLS-GR
Flint River Regional Library	J. Joel Edwards Public Library	FRRLS-ZE
Flint River Regional Library	Jackson-Butts County Public Library	FRRLS-JA
Flint River Regional Library	Monroe County Library	FRRLS-FY
Flint River Regional Library	Peachtree City Library	FRRLS-PT
Flint River Regional Library	Tyrone Public Library	FRRLS-TY
Georgia Public Library Service	GLASS - Georgia Library for Accessible Services	STATELIB-B
Georgia Public Library Service	Georgia State Library Collection	STATELIB-L
Hall County Library System	Blackshear Place Branch	HALL-BPL
Hall County Library System	Clermont Branch	HALL-CL
Hall County Library System	East Hall and Special Needs Library	HALL-EH
Hall County Library System	Gainesville Branch	HALL-GVL
Hall County Library System	Murrayville Branch	HALL-MV
Hall County Library System	Spout Springs Library	HALL-SSP
Hart County Library System	Hart County Library	HART-HQ
Henry County Library	Cochran Public Library / Stockbridge	HCLS-ST
Henry County Library	Fairview Branch	HCLS-FV
Henry County Library	Fortson Public Library / Hampton	HCLS-HA
Henry County Library	Locust Grove Public Library	HCLS-LG
Henry County Library	McDonough Public Library	HCLS-MD

Houston County Public Library	Centerville Branch Library	HOU-CV
Houston County Public Library	Nola Brantley Memorial Library / Warner Robins	HOU-WR
Houston County Public Library	Perry Branch Library	HOU-PE
Jefferson County Library	Bookmobile	JCL-BKMOBL
Jefferson County Library	Louisville Public Library	JCL-LVILLE
Jefferson County Library	McCollum Public Library	JCL-WRENS
Jefferson County Library	Wadley Public Library	JCL-WADLEY
Kinchafoonee Regional Library	Arlington Branch Library	KRLS-AR
Kinchafoonee Regional Library	Calhoun County Library	KRLS-CA
Kinchafoonee Regional Library	Clay County Library	KRLS-CL
Kinchafoonee Regional Library	Kinchafoonee Regional Library	KRLS-KI
Kinchafoonee Regional Library	Quitman County Public Library	KRLS-QU
Kinchafoonee Regional Library	Randolph County Library	KRLS-RA
Kinchafoonee Regional Library	Terrell County Library	KRLS-TE
Kinchafoonee Regional Library	Webster County Library	KRLS-WE
Lake Blackshear Regional Library System	Byromville Public Library	LBRLS-BYRM
Lake Blackshear Regional Library System	Cordele-Crisp Carnegie Library	LBRLS-CORD
Lake Blackshear Regional Library System	Dooly County Library	LBRLS-DOOLY
Lake Blackshear Regional Library System	Elizabeth Harris Library	LBRLS-UNAD
Lake Blackshear Regional Library System	Lake Blackshear Regional Library	LBRLS-LB
Lee County Public Library	Schley County Public Library	LBRLS-SCH
Lee County Public Library	Leesburg Branch	LEE-LSB
Lee County Public Library	Redbone Branch	LEE-RED
Lee County Public Library	Smithville Branch	LEE-SMV
Middle Georgia Regional Library	Charles A. Lanford Library	MGRL-LA
Middle Georgia Regional Library	Crawford County Public Library	MGRL-RO
Middle Georgia Regional Library	East Wilkinson County Library	MGRL-EW
Middle Georgia Regional Library	Genealogical and Historical Department	MGRL-GH
Middle Georgia Regional Library	Gordon Public Library	MGRL-GO
Middle Georgia Regional Library	Ideal Public Library	MGRL-ID
Middle Georgia Regional Library	Jones County Public Library	MGRL-JO
Middle Georgia Regional Library	Library for the Blind & Physically Handicapped	MGRL-LB
Middle Georgia Regional Library	Marshallville Public Library	MGRL-MA
Middle Georgia Regional Library	Miss Martha Bookmobile	MGRL-MM
Middle Georgia Regional Library	Montezuma Public Library	MGRL-MO
Middle Georgia Regional Library	Oglethorpe Public Library	MGRL-OG
Middle Georgia Regional Library	Regional Library	MGRL-RE
Middle Georgia Regional Library	Riverside Branch Library	MGRL-RV
Middle Georgia Regional Library	Shurling Branch Library	MGRL-SH
Middle Georgia Regional Library	Twiggs County Public Library	MGRL-TW
Middle Georgia Regional Library	Washington Memorial Library	MGRL-WA
Middle Georgia Regional Library	West Bibb Branch Library	MGRL-WB
Moultrie-Colquitt County Library	Bookmobile	MCCLS-BKM

Moultrie-Colquitt County Library	Doerun Municipal Library	MCCLS-DOE
Moultrie-Colquitt County Library	Moultrie-Colquitt County Library	MCCLS-HQ
Mountain Regional Library	Bookmobile	MRLS-BKMB
Mountain Regional Library	Fannin County Public Library	MRLS-FCPL
Mountain Regional Library	Mountain Regional Library	MRLS-MRL
Mountain Regional Library	Towns County Public Library	MRLS-TCPL
Mountain Regional Library	Union County Public Library	MRLS-UCPL
Newton County Library System	Covington Branch Library	NCLS-COVTN
Newton County Library System	Newborn Library Service Outlet	NCLS-NEWBRN
Newton County Library System	Porter Memorial Branch Library	NCLS-PORTER
Northeast Georgia Regional Library	Clarksville-Habersham County Library	NEG-CLRKVL
Northeast Georgia Regional Library	Cornelia-Habersham County Library	NEG-CORNEL
Northeast Georgia Regional Library	Rabun County Library	NEG-RABUN
Northeast Georgia Regional Library	System Offices	NEG-SYSTEM
Northeast Georgia Regional Library	Toccoa-Stephens County Library	NEG-TOCCOA
Northeast Georgia Regional Library	White County Library - Cleveland Branch	NEG-CLVLND
Northeast Georgia Regional Library	White County Library - Helen Branch	NEG-HELEN
Northwest Georgia Regional Library	Calhoun-Gordon County Library	NGRL-CG
Northwest Georgia Regional Library	Chatsworth Murray County Library	NGRL-CM
Northwest Georgia Regional Library	Dalton-Whitfield Library	NGRL-DW
Ocmulgee Regional Library System	Bleckley County Library	ORLS-BLE
Ocmulgee Regional Library System	Ocmulgee Regional Library Headquarters	ORLS-HDQ
Ocmulgee Regional Library System	Pulaski County Library	ORLS-PUL
Ocmulgee Regional Library System	Telfair County Library	ORLS-TEL
Ocmulgee Regional Library System	Wheeler County Library	ORLS-WHE
Ocmulgee Regional Library System	Wilcox County Library	ORLS-WIL
Oconee Regional Library	Glascocock County Library	OCRL-GIBSN
Oconee Regional Library	Johnson County Library	OCRL-WRIGH
Oconee Regional Library	Laurens County Library	OCRL-DUBLN
Oconee Regional Library	Rosa M. Tarbutton Memorial Library	OCRL-SANDR
Oconee Regional Library	Treutlen County Library	OCRL-SOPER
Ohoop Regional Library System	Bookmobile	OHOOP-BKML
Ohoop Regional Library System	Glennville / Tattnall County Library	OHOOP-TATG
Ohoop Regional Library System	Hazlehurst-Jeff Davis Branch	OHOOP-JDHAZ
Ohoop Regional Library System	Ladson Genealogical Library	OHOOP-LADS
Ohoop Regional Library System	Montgomery County Library	OHOOP-MONT
Ohoop Regional Library System	Nelle Brown Memorial [Lyon]	OHOOP-LYON
Ohoop Regional Library System	Reidsville / Tattnall County Library	OHOOP-TATR
Ohoop Regional Library System	Vidalia-Toombs County Library	OHOOP-VIDT
Okefenokee Regional Library System	Alma-Bacon County Public Library	OKRL-BACON
Okefenokee Regional Library System	Appling County Public Library	OKRL-APPL
Okefenokee Regional Library System	Blackshear Memorial Library	OKRL-BLMEM
Okefenokee Regional Library System	Clinch County Public Library	OKRL-CLNCH
Okefenokee Regional Library System	Waycross-Ware Co. Public Lib.	OKRL-WWC
Peach Public Libraries	Byron Public Library	PPL-BPL
Peach Public Libraries	Thomas Public Library	PPL-TPL
Piedmont Regional Library System	Auburn Public Library	PIED-AUB
Piedmont Regional Library System	Banks County Public Library	PIED-HOM

Piedmont Regional Library System	Bookmobile	PIED-BKM
Piedmont Regional Library System	Braselton Library	PIED-BRL
Piedmont Regional Library System	Commerce Public Library	PIED-COM
Piedmont Regional Library System	H.S. Swindle Public (Nicholson)	PIED-NIC
Piedmont Regional Library System	Headquarters-Winder	PIED-WIN
Piedmont Regional Library System	Jefferson Public Library	PIED-JEF
Piedmont Regional Library System	Maysville Public Library	PIED-MAY
Piedmont Regional Library System	Pendergrass Public Library	PIED-PEN
Piedmont Regional Library System	Statham Public Library	PIED-STA
Piedmont Regional Library System	Talmo Public Library	PIED-TAL
Pine Mountain Regional Library System	Butler Public Library	PMRLS-BPL
Pine Mountain Regional Library System	Extension Services	PMRLS-EXT
Pine Mountain Regional Library System	Greenville Area Public Library	PMRLS-GPL
Pine Mountain Regional Library System	Hightower Memorial Library	PMRLS-HML
Pine Mountain Regional Library System	Manchester Public Library	PMRLS-MPL
Pine Mountain Regional Library System	Reynolds Community Library	PMRLS-RCL
Pine Mountain Regional Library System	Talbot County Library	PMRLS-TCL
Pine Mountain Regional Library System	Yatesville Public Library	PMRLS-YPL
Roddenbery Memorial Library	Roddenbery Memorial Library	RML-MAIN
Sara Hightower Regional Library	Cave Spring Branch	SHRL-CS
Sara Hightower Regional Library	Cedartown Branch	SHRL-CD
Sara Hightower Regional Library	Outreach Collection	SHRL-BK
Sara Hightower Regional Library	Rockmart Branch	SHRL-RK
Sara Hightower Regional Library	Rome Branch	SHRL-RM
Satilla Regional Library	Ambrose Public Library	SRL-AMBR
Satilla Regional Library	Bookmobile	SRL-BKMO
Satilla Regional Library	Broxton Public Library	SRL-BROX
Satilla Regional Library	Douglas-Coffee County Library	SRL-DOUG
Satilla Regional Library	Nicholls Public Library	SRL-NICH
Satilla Regional Library	Pearson Public Library	SRL-PEAR
Satilla Regional Library	Willacoochee Public Library	SRL-WILLA
Screven-Jenkins Regional Library	Bookmobile	SJRLS-BKM
Screven-Jenkins Regional Library	Jenkins County Memorial Library	SJRLS-JCML
Screven-Jenkins Regional Library	Screven County Library	SJRLS-SCL
South Georgia Regional Library System	Allen Statenville Library	SGRL-ECHOLS
South Georgia Regional Library System	Bookvan	SGRL-BOOKVAN
South Georgia Regional Library System	Johnston Lakes Library	SGRL-LAKES
South Georgia Regional Library System	McMullen Southside Library	SGRL-SSIDE
South Georgia Regional Library System	Miller Lakeland Library	SGRL-LANIER
South Georgia Regional Library System	Salter Hahira Library	SGRL-HAHIRA
South Georgia Regional Library System	Talking Book Center	SGRL-TBC
South Georgia Regional Library System	Valdosta-Lowndes County Library	SGRL-VALDOSTA
Southwest Georgia Regional Library	Bookmobile	SWGRL-BKM
Southwest Georgia Regional Library	Decatur County Public Library	SWGRL-DEC
Southwest Georgia Regional Library	Miller County Public Library	SWGRL-MIL
Southwest Georgia Regional Library	Seminole Public Library	SWGRL-SEM

Statesboro Regional Library	Bryan County Library, Pembroke	STRL-PEMB
Statesboro Regional Library	Bryan County Library, Richmond Hill	STRL-RHILL
Statesboro Regional Library	Evans County Library, Evans	STRL-CLAX
Statesboro Regional Library	Franklin Memorial Library, Emanuel County, Swainsboro	STRL-SWAIN
Statesboro Regional Library	Headquarters, Statesboro	STRL-SBORO
Statesboro Regional Library	L.C. Anderson Memorial Library, Candler County, Metter	STRL-METT
Thomas County Public Library System	Boston Carnegie Library	TCPLS-BOS
Thomas County Public Library System	Coolidge Public Library	TCPLS-COOL
Thomas County Public Library System	Gladys M. Clark Public Library	TCPLS-OCH
Thomas County Public Library System	Meigs Public Library	TCPLS-MEIGS
Thomas County Public Library System	Pavo Public Library	TCPLS-PAVO
Thomas County Public Library System	Thomas County Public Library	TCPLS-THOMAS
Three Rivers Regional Library	Bookmobile	TRRL-BKM
Three Rivers Regional Library	Brantley County Library	TRRL-BRANT
Three Rivers Regional Library	Brunswick-Glynn County Library	TRRL-GLYNN
Three Rivers Regional Library	Camden County Library	TRRL-CAMDN
Three Rivers Regional Library	Charlton County Library	TRRL-CHARL
Three Rivers Regional Library	Hog Hammock Public Library	TRRL-SAPLO
Three Rivers Regional Library	Long County Library	TRRL-LONG
Three Rivers Regional Library	McIntosh County/Ida Hilton Library	TRRL-MCINT
Three Rivers Regional Library	St. Mary's Library	TRRL-STMRY
Three Rivers Regional Library	St. Simons Library	TRRL-SSI
Three Rivers Regional Library	Wayne County Library	TRRL-WAYNE
Troup-Harris Regional Library	Harris County Public Library	THRL-HC
Troup-Harris Regional Library	Hogansville Public Library	THRL-HOG
Troup-Harris Regional Library	LaGrange Memorial Library	THRL-LAG
Troup-Harris Regional Library	Williams Memorial Library	THRL-WMS
Twin Lakes Library System	Lake Sinclair Library	TLLS-LS
Twin Lakes Library System	Mary Vinson Memorial Library	TLLS-MV
Uncle Remus Regional Library System	Greene County Public Library	URRLS-GR
Uncle Remus Regional Library System	Hancock County Public Library	URRLS-HA
Uncle Remus Regional Library System	Jasper County Public Library	URRLS-JA
Uncle Remus Regional Library System	Monroe-Walton County Library	URRLS-MR
Uncle Remus Regional Library System	Morgan County Library	URRLS-MA
Uncle Remus Regional Library System	O'Kelly Memorial Library	URRLS-OK
Uncle Remus Regional Library System	Putnam County Public Library	URRLS-PU
Uncle Remus Regional Library System	Stanton Memorial Library	URRLS-SC
West Georgia Regional Library	Bookmobile	WGRL-BKM
West Georgia Regional Library	Bowdon Public Library	WGRL-BO
West Georgia Regional Library	Bremen Public Library	WGRL-BR
West Georgia Regional Library	Buchanan Branch Library	WGRL-BU
West Georgia Regional Library	Crossroads Public Library	WGRL-CR
West Georgia Regional Library	Douglas County Public Library	WGRL-DC
West Georgia Regional Library	Ephesus Public Library	WGRL-EP
West Georgia Regional Library	Heard County Public Library	WGRL-FR

West Georgia Regional Library	Lithia Springs Betty C. Hagler Public Library	WGRL-LS
West Georgia Regional Library	Maude Ragsdale Public Library	WGRL-MR
West Georgia Regional Library	Mount Zion Public Library	WGRL-MZ
West Georgia Regional Library	New Georgia Public Library	WGRL-NG
West Georgia Regional Library	Paulding County Public Library	WGRL-PC
West Georgia Regional Library	Tallapoosa Public Library	WGRL-TA
West Georgia Regional Library	Villa Rica Public Library	WGRL-VR
West Georgia Regional Library	West Ga. Regional Library Hdqtrs.	WGRL-HQ
West Georgia Regional Library	Whitesburg Public Library	WGRL-WB
Worth County Library System	Sylvester-Margaret Jones Library	WORTH-SYLV