

# PINES Circulation Policies and Procedures Manual

**Version 2014.04** 

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## **About This Manual**

This manual is based on the 2003 version of the PINES Circulation Policies and Procedures Manual that contained complete descriptions of procedures in the existing automation system. The document was brought up to date with references to Evergreen and completely revised by in 2010 by a dedicated workgroup made of up representatives of PINES member libraries. Since then, it has been updated regularly to accommodate policy changes, new procedures due to changes in the software, and additional information.

#### **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.

## **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.

## Confidentiality

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.

## **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. Individual patron abuse of general PINES policies may be addressed at the local level by the system director [2012.03].

#### 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 "Include inactive patrons?" box should be checked and the "Limit results to patrons in:" option should be set to "PINES." If an identical name is found, compare the address, birth date, 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. Instead, update the existing record with the corrected information.

- If the patron's information is outdated, update the information. (See: *Editing /* Updating a Patron Record)
- If a patron has lost his or her card, issue a replacement card and charge the replacement fee. (See: Lost/Stolen Card)
- 2. If the name is NOT found in the database, open the Register Patron screen (Circulation > Register Patron or Shift + F1). The PINES user record can contain as many addresses as necessary, and notes and comments that display to all PINES facilities.
- 3. Required fields are:
  - Barcode
  - OPAC/Staff Client User Name
  - Password
  - Verify Password
  - First Name
  - Middle Name is strongly encouraged but not required.
  - Last Name
  - Date of Birth
  - Primary Identification Type (and information)
  - Home Library
  - Main (Profile) Permission Group
  - Privilege Expiration Date
  - Internet Access Level
  - Address (Type, Postal Code, Street (1), City
  - Response to the Voter Registration Survey Question
- 4. See following page for additional description of both required and optional fields.

Board of Regents of the University System of Georgia Original Issue Date: October 29, 1999 Current Revision Date: April 28, 2014 (Revision 2014.04) 5. 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.

#### Patron Registration Field Descriptions

- **Barcode** Staff should scan the library card barcode to enter. Accounts created for staff use only may be given a unique identifier (Example: CLAYTN-HQSCIR1) other than a barcode.
- **OPAC/Staff Client User Name** 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 after it is entered. If the patron does not have a phone, staff may provide the system-generated 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. If the patron has a single name (one word or one letter), enter that name in both the First Name and the Last Name fields [2013.12].
- **Suffix/Title** 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.
- **OPAC/Staff Client Holds Alias** This 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 does not recommend 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. Birth date is a required field [2010.02]. For cases in which the patron date of birth is unknown, staff will enter the dummy date "1901-01-01" to allow the patron record to be saved [2011.09].
- **Juvenile** This checkbox will automatically be checked if the birthdate entered indicates that the patron is under 18 years old [2006.05]. If the patron is a juvenile, the Parent/Guardian field must be filled out (at the time of this documentation, the Evergreen software does not require the Parent/Guardian field, but this policy indicates that it should be).
- **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].

Board of Regents of the University System of Georgia Original Issue Date: October 29, 1999 Current Revision Date: April 28, 2014 (Revision 2014.04)

- **Primary Identification** Staff should enter drivers license number in the specified format (GA-XXXXXXXXX), substituting the appropriate state abbreviation (e.g., FL, AL, SC, TN) for non-Georgia drivers licenses. If the drivers license was not used for primary identification, enter relevant information and explain in the Alert Message field if necessary.
- **Parent or Guardian** This field is used to enter the name of a juvenile's parent or legal guardian.
- Email Address Staff should encourage PINES users to provide email addresses for the benefit of receiving automated hold, overdue, and preminder (pre-overdue reminder) notices. An email address stored in the system also allows the patron to use the automated "Forgot your password?" feature in the OPAC. (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 Phone Telephone number (usually, cell phone) 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.
- Main (Profile) Permission 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** Normal users. Privilege is two years. This user will be blocked 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.
  - o Class No longer used in PINES [2003.02].
  - o **Friend** − 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.
  - o **NonResident** A library user who resides in the state of Georgia, but outside of the areas served by PINES libraries. Privilege is one year. This user will be blocked if a total of \$10 or more is owed. User is billable. User may have up to 50 holds at a time.
  - OutOfState A library user who resides out-of-state. Privilege fee is \$25. Privilege limit is 1 year. This user will be blocked if a total of \$10 or more is owed. User is billable. User may have up to 50 holds at a time.
  - Outreach 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. (At the time this document was updated, this profile was under review.)

- PaymentPlan 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].
- o **Restricted** A library user with 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.
- o **StaffNoPerm** A library user who has staff member privileges on borrowing items, but does not have staff-level permissions [2009.05].
- o **Temp** A library user 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 card carries limited borrowing privileges. This user may check out 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 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.
- o **TempRes12** 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.
- o **Trustee** 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.
- **Privilege Expiration Date** 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 -** Checked by default. If unchecked, the patron is no longer considered an active PINES patron and will no longer be included in statistical reports. (See *Inactive Patrons*)
- **Barred** (See*User Status Barred*)
- **Is Group Lead Account** Unchecked by default. If multiple patrons are grouped together (example: a parent with children), one patron in the group will be the lead account.
- 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 by editing the patron record
- Claims Never Checked Out Count This feature is not used in PINES [2012.03].
- **Alert Message** Staff may enter an alert message that will appear when the account is retrieved.

- **Default Hold Pickup Location** If set, holds placed for this patron will default to be delivered to this location. May or may not be the same as the Home Library.
- **Default Phone Number** Default phone number to be called when a hold is available for pickup (optional).
- **Collections: Exempt** This feature is not used in PINES.
- **Hold is Behind Circ Desk** For patrons who pick up holds at a library branch that places holds for pickup in a public area by default and who are concerned about privacy. If this box is checked, the patron's holds will be stored behind the circulation desk and not in a public area.
- Hold Notification Format (Phone and/or Email) Sets default contact preference when holds are available for pickup.
- Address Fields
  - o **Mailing / Billing –** Both are selected by default. An additional address may be selected if necessary.
  - Type Defaults to "MAILING." Staff must otherwise enter 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."
  - O **Postal Code** 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, particularly when one postal code covers portions of more than one city).
  - o **Street (1)** The number and street for the address.
  - o Street (2) Apartment, Lot, Suite, or additional address information.
  - o City City of residence.
  - o **County -** County of residence (optional, but auto-populated by Postal Code entry). Although optional, this is useful for statistical reports.
  - o **State** State of residence (if a Georgia Postal Code is entered, defaults to GA).
  - o Country Country of residence (defaults to USA).
  - Valid Address? Checked by default. May be edited if an address is found to be invalid.
  - o **Within City Limits?** Based on patron-provided information, staff may uncheck this box or leave it checked (checked by default). This is useful for statistical reports.
  - o **New Address** Additional addresses may be added as needed. Addresses may also be deleted, but the primary address may not be deleted. Note: For accounts that are grouped, the owner of the address must be edited with the correct address or the patron must be removed from the group to change a single patron's address.

- 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. The "Non-English Primary Language" category was 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.
- **Voter Registration** PINES uses the Survey function to electronically record patron voter registration responses to be in compliance with Georgia law. (See Voter Registration Survey)
- **Additional Surveys** Additional s Surveys may be created at the local library system level by the Local System Administrator.

#### Saving the Patron Registration Form

When you are finished entering the patron's information, click the Save 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.

#### Cloning a Patron with the Same Address

When more than one member of a family is registering at the same time, the Save and Clone function can be used. The cloned patrons will automatically be grouped with the first patron (see *Ungrouping Cloned Patrons*).

- 1. Register the first family member using the procedure outlined above.
- 2. When the form is complete, click Save and Clone.
- 3. Complete the patron information as normal, modifying the information that was filled in automatically as needed.

#### Editing / Updating a Patron Record

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 *Patron Registration Field Descriptions* section.

#### Card Expiration and Renewal

Most PINES cards are valid for 2 years. The system will notify staff that a card is about to expire (within 30 days) or has already expired by placing an alert on the patron record which displays whenever the patron record is retrieved.

At that time, staff should ask to see current identification and update the patron's information (address, phone number, etc.) 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 *Patron Registration Field Descriptions* section for details about each screen/field.

The patron 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.

#### 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 Replace Barcode button in the User Identification screen and assign a new card to the patron.

To see a patron's previously active cards, staff may click the See All button on the User Identification screen.

The charge for a replacement card is \$2 [1999.10]; 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).

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.

#### **Incorrect Addresses**

When mail is returned to the library due to an incorrect address, the patron's address 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.

#### 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, telephone numbers, and hold pickup location 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. (Please note that the \$2 card replacement fee is waived in this scenario.) 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 and hold pickup location should be changed in the patron record and the address and telephone information should be updated.

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

#### User Status - Blocked

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



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 Status - Barred

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



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].

Voter Registration Survey)

#### **Inactive Patrons**

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 all of 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 [2008.11]:

- 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

#### Multiple Patron Accounts / Patron Record Merging

If a patron is discovered to have multiple accounts, the accounts may be merged. This facilitates patron database cleanup and helps to address the issue of outstanding charges on multiple accounts. To see a patron's previously active cards, staff may click the See All button on the User Identification screen.

Patron record merging is restricted to PINES staff due to the intensive nature of the updates involved. Contact the PINES staff via the Help Desk with the accounts that should be merged and which of the accounts is current. PINES has configured patron merging to preserve all history on all merged records [2012.03].

## Patron Record Deletion / Deceased Patrons

Evergreen contains a feature that allows the complete deletion of patron accounts, but this is restricted to extreme cases and may only be performed by PINES staff at the request of a library director. In the case of deceased patrons, a suggested alternative would be to change the name on the patron account to first name "Deceased," last name "Patron," which will effectively anonymize that person's account without affecting circulation or billing history.

#### **Ungrouping Cloned Patrons**

First, ungroup the account:

- 1. Open the account to be ungrouped.
- 2. Switch to the Group tab.
- 3. Click the Group Member Details button.
- 4. Select the account to be ungrouped from the list.
- 5. Click Choose an Action then Remove Selected Patrons From The Group.
- 6. Click OK and then OK again.
- 7. Close and then reopen the account the Group tab should now be empty.

#### Second, add the new address:

- 1. Edit the account information.
- 2. Click the New Address button (below the existing address).
- 3. Enter the new address information.
- 4. Mark the new address as both Mailing and Billing.
- 5. Save.
- 6. When the screen refreshes, it should automatically remove the old address, but if it does not, you may now manually delete it.

#### User Status - Blocked

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



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 Status - Barred**

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



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].

#### **Voter Registration Survey**

PINES libraries will keep records of voter registration and declination electronically within the PINES user record. Each time a user record is created or modified, a patron must be asked if he/she wishes to register to vote, and his/her decision must be recorded in the designated field.

PINES libraries should include the following question on the PINES card application:

If you aren't registered to vote, would you like to register to vote here today? Select one:

- o I am already registered to vote
- o I want to register to vote
- o I do not want to register to vote
- o I do not wish to register to vote, but will take a registration form home
- o I am not eligible to vote
- All public libraries are required to keep this information for two (2) years by the Georgia
  Secretary of State's office. Georgia public libraries must continue to follow all rules and
  requirements of the Motor Voter Act as specified by the Georgia Secretary of State's Office.
- To ensure timely processing of applications, completed voter registration applications must be mailed to the Secretary of State's office as follows:

LIBRARIES ARE REQUIRED TO MAIL ANY COMPLETED VOTER REGISTRATION APPLICATIONS WEEKLY. THE EXCEPTION TO THIS RULE IS DURING THE 15 DAYS PRIOR TO ANY REGISTRATION DEADLINE WHEN SUBMITTAL OF ANY COMPLETED APPLICATIONS TO THE SECRETARY OF STATE ELECTIONS OFFICE MUST BE MADE DAILY.

- o Election calendars can be found at: www.sos.ga.gov/electionconnection
- o If you do not have any completed applications, you do not need to submit anything to the Secretary of State's office.
- Mail the applications in the pre-paid envelope provided by the Secretary of State's office. You may either include a daily recap sheet (or similar agency identifying sheet) with your submittal, or you may print or stamp the following on the pre-paid envelope:
  - Supervisor and Facility Name
  - o Address
  - o Phone Number

More information may be found at the Georgia Secretary of State's website: http://www.sos.ga.gov/electionconnection/libraries.htm

## 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:

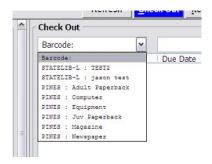
- Staff member selects Check Out Items from the Circulation menu (F1).
- Patron presents his/her library card; staff member scans card, determines if patron is in good standing (ie, not blocked, barred, inactive, owing too many fines, etc.)
- Staff member scans barcodes of items presented for checkout.
- 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.

#### 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-barcoded 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 it 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:

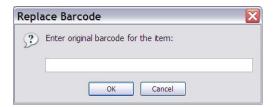


When the item is returned, it must be forwarded to the Cataloging Department for full entry into the database. Brief records should not remain in the system for more than one circulation. PINES member libraries will be asked to periodically clean up brief records by deleting them or creating full records [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 Alert Message 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 (see *Check-Out/Renewal* for exceptions) 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].

#### Restricted Holds on Age-Protected Items and Audio-Visual Materials

Audio-visual items and age-protected items 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]

Library systems may choose to assign new items to 3-month, 6-month, or no age protection. If a new item is set to 3-month age protection, it can only circulate from the owning branch for the first 3 months and then rolls over to 6-month age protection for the remaining 3 months. If set at 6-month age protection, the item can only circulate from the owning system. If no age protection is set, the item can circulate throughout PINES.

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]

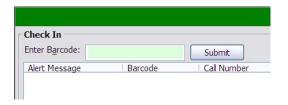
#### Check-In

When checking in materials, it is crucial 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.

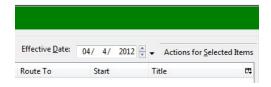
#### Basic Check-In

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:



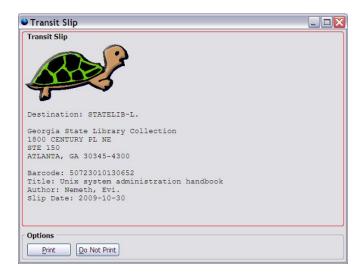
#### Changing the Default Check-In Date

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. Set the desired check-in date, and check in items normally:



#### **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.

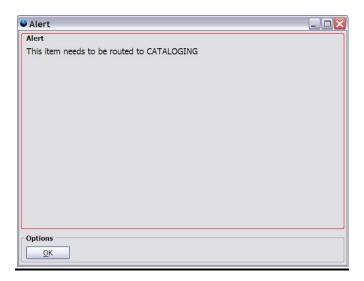
#### **Hold Items**

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



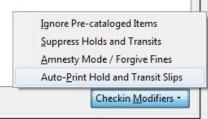
#### Pre-cataloged Items

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 (Checkin Modifiers)

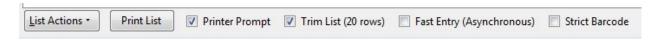
Evergreen includes several options for checkin, the controls for which may be selected by clicking the Checkin Modifiers button on the lower right of the screen:



- **Ignore Pre-cataloged Items** When checked, an "Ignore Pre-cataloged Items" message will appear at the top of the screen and any pre-cataloged items will not appear in the checked-in list.
- Suppress Holds and Transits When checked, a "Suppress Holds and Transits" message will appear at the top of the screen and holds or transits will not be triggered by check in. Not for normal use.
- **Amnesty Mode/Forgive Fines** When checked, an "Amnesty Mode/Forgive Fines" message outlined in red will appear at the top of the screen and all fines for any late items will be forgiven automatically.
- **Auto-Print Hold and Transit Slips** Staff members may need to ensure that the Auto-Print Hold and Transit Slips checkbox is checked when appropriate.

Each setting is unchecked by default, but the preferred setting is retained by the staff client once selected.

The Check In interface provides a number of features for allowing the printing or export of checked-in 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
  - o **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.
- **Printer Prompt** when checked, the "choose printer" window will open each time a receipt needs to be printed. Checked by default.
- **Trim List (20 rows)** limits the list to 20 rows, regardless of how many barcodes are input. Checked by default.
- **Fast Entry (Asynchronous)** intended to allow sped up checkin by not requiring that each item's information is passed back to the staff client when an item is checked in. This feature is not well tested in PINES, so please use with caution.
- **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..

#### 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 <a href="http://pines.georgialibraries.org/pines-circulation-matrix">http://pines.georgialibraries.org/pines-circulation-matrix</a>). On July 1, 2012, the fine rate for books increased from \$0.15 to \$0.20 per day [2012.05].

#### **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.

All emailed notifications now include a "do not reply to this email" message [2011.12].

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].

The wording of the 10-day notice follows. The items between % and in braces [] are placeholders for the actual information displayed when emails are sent:

```
[% date %]
To: [% user.email %]
From: [% sender_email %]
Subject: Overdue Notification

Dear [% last_name %], [%first_name %]
Our records indicate the following items are 10 days or more overdue.
[% list of items %]
```

```
Please return the above items to avoid additional fines. Please do not respond to this email. This notice was sent from an address that cannot accept incoming mail.

Contact your library for more information:

[% library_contact_info %]
```

#### Pre-Overdue Notices ("Preminders")

PINES sends a "pre-overdue" notice or "preminder" 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].

Patrons should be aware that although PINES sends preminders, it is a courtesy only. Some email providers may block the preminder emails at the server level, preventing them from arriving at their destinations. The patron is ultimately responsible for returning or renewing items by their due dates whether or not the preminders are received.

The wording for the preminders 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]. Payments for lost or damaged materials will be returned to the owning library. These payments must be remitted monthly [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 choose to implement "fine-free" or "food-for-fines" library promotions. These will apply only to items owned by 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 (set per library), 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].

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. See *Collection/Materials Recovery Agencies*.

#### **Long-Overdue Items**

The PINES Executive Committee agreed upon a Long Overdue policy in May of 2006 [2006.05], but the system was not capable of managing it at the time. At the time of this policy revision, this feature has been developed, but not yet implemented.

Once this feature is implemented, items that are overdue for longer than 180 days will be automatically changed to a status of LONG OVERDUE unless the patron has been flagged for collections (see *Collection/Materials Recovery Agencies*). The price of the item, plus an optional processing fee of up to \$10 (set per library), will be assessed to the patron's card. Overdue fines on the item will be automatically voided. Payments for long overdue items will be returned to the owning library.

#### Recovering Lost and Long Overdue Items and Refunding Payment

If an item that has been marked lost and then paid for by the patron is returned within 180 days of payment [2003.02], Evergreen will automatically create a refund of the payment, <u>minus</u> the overdue fines which have accrued (in other words, Evergreen restores the automatically voided overdue fines) [2002.09] and minus any processing fees which were applied.

**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.

The "found" materials may be returned to any PINES library but routed to the owning 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, after which no more items for that user can be marked Claims Returned. If Claims Returned items are found, the Claims Returned counter on the patron's account information screen may be manually changed at the discretion of the owning library system. A Claims Returned item can be declared Lost if it is not found after 45 days [1999.10].

#### **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].

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#### 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:

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- 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**

- 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.

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- 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 between % and in braces [] are placeholders for the actual information displayed when emails are sent:

```
[% date %]
[% user_name %]
[% pickup_library %]
To: [% user_email %]
From: [% sender_email %]
Subject: Hold Available Notification

Dear [% first_name %] [% last_name %],
The item(s) you requested are available for pickup from the Library.
Contact the Circulation Desk to check out the item.
[% list of items %]
Please do not reply to this email. This notice was sent from an address that cannot accept incoming mail.
```

#### **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.
- See also: Proxy Borrowing

#### 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 and Courier Codes**

System Name	Library Name	Policy Name	STAT Code	
Athens Regional Library System				
	ARL-Bookmobile	ARL-BKM	111/222	
HQ	Athens-Clarke County Library	ARL-ATH	111/222	
	Bogart Library	ARL-BOG	111/222	
	Carnesville Resource Center	ARL-CAR	111/222	
	East Athens Community Resource Ctr.	ARL-EAST	111/222	
	Lavonia Carnegie Library	ARL-LAV	111/222	
	Lay Park Community Resource Ctr.	ARL-LAY	111/222	
	Lyndon House Art Resource Ctr.	ARL-LYNDON	111/222	
	Madison County Library	ARL-DAN	111/222	
	Oconee County Library	ARL-WAT	111/222	
	Oglethorpe County Library	ARL-LEX	111/222	
	Pinewoods North Community Learning Center	ARL-PWOODS	111/222	
	Royston Library	ARL-ROY	111/222	
	Sandy Creek ENSAT Resource Ctr.	ARL-ENSAT	111/222	
	Winterville Library	ARL-WINT	111/222	
Bartram Trail Regi	onal Library			
	BTRL-Bookmobile	BTRL-BKM	555/333	
HQ	Mary Willis Library	BTRL-MWL	555/333	
	Taliaferro County Library	BTRL-TCL	555/333	
	Thomson-McDuffie County Library	BTRL-MCD	555/333	
<b>Brooks County Pu</b>	blic Library			
HQ	Brooks County Public Library Headquarters	BROOK-HQ	888/222	
Catoosa County L		<u>.</u>		
HQ	Catoosa County Library	CCL-RING	333/555	
Chattooga County	Library	<u>.</u>		
HQ	Chattooga County Library	CHAT-SMRVL	333/333	
	Trion Public Library	CHAT-TRION	333/333	
Cherokee Regiona	l Library			
	Chickamauga Public Library	CHRL-CHICK	333/444	
	Dade County Public Library	CHRL-DADE	333/444	
HQ	LaFayette-Walker County Library	CHRL-LW	333/444	
	Rossville Public Library	CHRL-ROSS	333/444	
Chestatee Regiona	al Library System			
HQ	Dawson County Library	CRLS-DAWSN	222/111	
	Lumpkin County Library	CRLS-LMPKN	222/111	

Clayton County Li	brary System		
olayton oounly <u>-</u>	Forest Park Branch	CLAYTN-FOR	444/222
HQ	Headquarters Library	CLAYTN-HQS	444/222
	Jonesboro Branch	CLAYTN-JON	444/222
	Lovejoy Branch	CLAYTN-LOV	444/222
	Morrow Branch	CLAYTN-MOR	444/222
	Riverdale Branch	CLAYTN-RIV	444/222
Coastal Plain Regi	onal Library		
	Carrie Dorsey Perry Memorial Library	CPRL-B	999/555
HQ	Coastal Plain Regional Library	CPRL-R	999/555
	Coastal Plain Regional Library Bookmobile	CPRL-BKM	999/555
	Cook County Library	CPRL-C	999/555
	Irwin County Library	CPRL-L	999/555
	Tifton-Tift County Public Library	CPRL-T	999/555
	Victoria Evans Memorial Library	CPRL-A	999/555
Conyers-Rockdale	Library System		
HQ		ROCK-NG	444/555
DeSoto Trail Region	onal Library		
	Baker County Library	DTRL-BAKR	888/666
HQ	Camilla-DeSoto Trail Regional Library	DTRL-CAMI	888/666
	Jakin Public Library	DTRL-JAKN	888/666
	Lucy Maddox Memorial Library	DTRL-BLAK	888/666
	Pelham-Carnegie Library	DTRL-PELH	888/666
	Salecity Public Library	DTRL-SALECITY	888/666
<b>Dougherty County</b>	Public Library		
HQ	Central Library	DCPL-CEN	888/777
	Northwest Library	DCPL-NW	888/777
	Southside Library	DCPL-SS	888/777
	Tallulah Massey Library	DCPL-TAL	888/777
	Westtown Library	DCPL-WT	888/777
East Central Georg	gia Regional Library		
	Appleby Branch Library	ECGR-APPBY	555/444
	Audio/Visual Center / TBC Library	ECGR-AVTBC	555/444
HQ		ECGR-MAIN	555/444
	Augusta-Richmond County Public Library	ECGR-BKM	555/444
	Bookmobile	500D BUBLE	555/444
	Burke County Library, Waynesboro	ECGR-BURKE	555/444
	Diamond Lakes Branch Library	ECGR-DIAML	555/444
	Friedman Branch Library	ECGR-FRMAN	555/444
	Maxwell Branch Library	ECGR-MXWLL	555/444
	Midville Branch Library	ECGR-MIDVL	555/444
	Sardis Branch Library	ECGR-SRDIS	555/444
	Wallace Branch Library	ECGR-WALLC	555/444

Elbert County Pub	lic Library System		
Zibort Gounty i ub	Bowman Branch	ECPL-BWMN	111/333
	ECPL-Bookmobile	ECPL-BKM	111/333
HQ	Elbert County Public Library	ECPL-ECPL	111/333
	County Library System		11.,,000
HQ	Fitzgerald-Ben Hill County Library	FBHCL-MAIN	999/111
Flint River Region	<u> </u>		
	Barnesville-Lamar County Library	FRRLS-BA	44/33/66
	Fayette County Public Library	FRRLS-FA	44/33/11
HQ	Griffin-Spalding County Library	FRRLS-GR	444/333
	J. Joel Edwards Public Library	FRRLS-ZE	
	Jackson-Butts County Public Library	FRRLS-JA	44/33/44
	Monroe County Library	FRRLS-FY	44/33/77
	Peachtree City Library	FRRLS-PT	44/33/22
	Tyrone Public Library	FRRLS-TY	44/33/33
Georgia Public Lib			
	GLASS - Georgia Library for Accessible	STATELIB-B	000/999
	Services		
	Georgia State Library Collection	STATELIB-L	444/111
<b>Greater Clarks Hill</b>			
	Columbia County Library	GCHR-CC0	555/555
	Euchee Creek Library	GCHR-EC	555/555
	Harlem Branch Library	GCHR-HAR	555/555
	Lincoln County Library	GCHR-LCO	555/555
	Warren County Library	GCHR-WCO	555/555
Hall County Librar			
	Blackshear Place Library	HALL-BPL	222/444
	Clermont Branch Library	HALL-CL	222/444
	East Hall and Special Needs Library	HALL-EH	222/444
HQ	Hall County Library	HALL-GVL	222/444
	Murrayville Branch Library	HALL-MV	222/444
	Spout Springs Library	HALL-SSP	222/444
<b>Hart County Libra</b>			
HQ	Hart County Library	HART-HQ	111/444
<b>Henry County Libr</b>			
	Cochran Public Library	HCLS-ST	444/444
	Fairview Public Library	HCLS-FV	444/444
	Fortson Public Library	HCLS-HA	444/444
HQ	Henry County Library System Headquarters	HCLS-HQ	444/444
	Laguet Crova Dublic Library	HCLS-LG	444/444
	Locust Grove Public Library  McDonough Public Library	HCLS-LG HCLS-MD	444/444

Houston County Public Library				
	Centerville Public Library	HOU-CV	777/111	
	Nola Brantley Memorial Library / Warner Robins	HOU-WR	777/111	
HQ	Perry Branch Library	HOU-PE	777/111	
Jefferson County				
HQ	Louisville Public Library	JCL-LVILLE	777/666	
	Louisville Public Library-Bookmobile	JCL-BKMOBL	777/666	
	McCollum Public Library	JCL-WRENS	777/666	
	Wadley Public Library	JCL-WADLEY	777/666	
Kinchafoonee Reg	ional Library System			
	Calhoun County Library	KRLS-CA	888/999	
	Clay County Library	KRLS-CL	888/999	
HQ	Kinchafoonee Regional Library	KRLS-KI	888/999	
	Quitman County Public Library	KRLS-QU	888/999	
	Randolph County Library	KRLS-RA	888/999	
	Terrell County Library	KRLS-TE	888/999	
	Webster County Library	KRLS-WE	888/999	
Lake Blackshear F	Lake Blackshear Regional Library System			
	Byromville Public Library	LBRLS-BYRM	666/555	
	Cordele-Crisp Carnegie Library	LBRLS-CORD	666/555	
	Dooly County Library	LBRLS-DOOLY	666/555	
	Elizabeth Harris Library	LBRLS-UNAD	666/555	
	Lake Blackshear Bookmobile	LBRLS-BKM	666/555	
HQ	Lake Blackshear Regional Library	LBRLS-LB	666/555	
	Schley County Public Library	LBRLS-SCH	666/555	
Lee County Public				
	Lee County Public Library	LEE-LSB	88/88/22	
HQ	Oakland Library	LEE-OAK	888/888	
	Redbone Public Library	LEE-RED	88/88/11	
	Smithville Library	LEE-SMV	888/888	
Marshes of Glynn R	egional Library		-	
HQ	Brunswick-Glynn County Library	MOGL-BWK	999/888	
	St. Simons Library	MOGL-SSI	999/888	

Middle Georgia Re	egional Library		
<b>J</b>	Charles A. Lanford Library	MGRL-LA	000/111
	Crawford County Public Library	MGRL-RO	000/111
	East Wilkinson County Library	MGRL-EW	000/111
	Genealogical and Historical Department	MGRL-GH	000/111
	Gordon Public Library	MGRL-GO	000/111
	Ideal Public Library	MGRL-ID	000/111
	Jones County Public Library	MGRL-JO	000/111
	Library for the Blind & Physically Handicapped	MGRL-LB	000/111
	Marshallville Public Library	MGRL-MA	000/111
	Montezuma Carnegie Public Library	MGRL-MO	000/111
	Oglethorpe Public Library	MGRL-OG	000/111
HQ	Regional Library	MGRL-RE	000/111
	Riverside Branch Library	MGRL-RV	000/111
	Shurling Branch Library	MGRL-SH	000/111
	Twiggs County Public Library	MGRL-TW	000/111
	Washington Memorial Library	MGRL-WA	000/111
	West Bibb Branch Library	MGRL-WB	000/111
Moultrie-Colquitt (	County Library System	_L	
	Monroe Memorial Library	MCCLS-DOE	888/333
	MCCLS-Bookmobile	MCCLS-BKM	888/333
HQ	Moultrie-Colquitt County Library	MCCLS-HQ	888/333
Mountain Regiona			
	Fannin County Public Library	MRLS-FCPL	22/22/11
HQ	Mountain Regional Library System	MRLS-MRL	222/222
	Mountain Regional Library System Bookmobile	MRLS-BKMB	222/222
	Towns County Public Library	MRLS-TCPL	22/22/33
	Union County Public Library	MRLS-UCPL	22/22/22
<b>Newton County Li</b>	brary System		
HQ	Newton County Library Headquarters	NCLS-COVTN	555/111
	Newton County Newborn Branch	NCLS-NEWBRN	555/111
	Porter Memorial Branch Library	NCLS-PORTER	555/111
Northeast Georgia	•		
<u> </u>	Clarkesville-Habersham County Library	NEG-CLRKVL	22/33/77
	Cornelia-Habersham County Library	NEG-CORNEL	22/33/22
	Rabun County Library	NEG-RABUN	22/33/44
HQ	Northeast Georgia Regional Library System Offices	NEG-SYSTEM	22/33/77
	Toccoa-Stephens County Library	NEG-TOCCOA	22/33/33
	White County Library - Cleveland Branch	NEG-CLVLND	22/33/55
	White County Library - Helen Branch	NEG-HELEN	22/33/66
Northwest Georgia	a Regional Library		1
	Calhoun-Gordon County Library	NGRL-CG	333/666
	Chatsworth Murray County Library	NGRL-CM	333/666
HQ	Dalton-Whitfield Library	NGRL-DW	333/666
	<u>-</u>		

Ocmulgee Region	al Library System		
<u> </u>	Cochran-Bleckley/Tessie W. Norris	ORLS-BLE	666/333
	M. E. Roden Public Library	ORLS-PUL	666/333
HQ	Murrell Memorial Library	ORLS-HDQ	666/333
	Public Service Annex	ORLS-EXT	666/333
	Telfair County Library	ORLS-TEL	666/333
	Wheeler County Library	ORLS-WHE	666/333
	Wilcox County Public Library	ORLS-WIL	666/333
Oconee Regional			
-	Glascock County Library	OCRL-GIBSN	777/222
	Johnson County Library	OCRL-WRIGH	777/222
HQ	Oconee Regional Library	OCRL-DUBLN	777/222
	Rosa M. Tarbutton Memorial Library	OCRL-SANDR	777/222
	Treutlen County Library	OCRL-SOPER	777/222
Ohoopee Regiona			
	Glennville Public Library	OHOOP-TATG	777/333
	Hazlehurst-Jeff Davis Public Library	OHOOP-JDHAZ	777/333
	Ladson Genealogical Library	OHOOP-LADS	777/333
	Montgomery County Library	OHOOP-MONT	777/333
	Nelle Brown Memorial Library	OHOOP-LYON	777/333
	Tattnall County Library	OHOOP-TATR	777/333
HQ	Vidalia-Toombs County Library	OHOOP-VIDT	777/333
	Vidalia-Toombs County Library Bookmobile	OHOOP-BKM	777/333
Okefenokee Regio	nal Library System		
	Alma-Bacon County Public Library	OKRL-BACON	999/333
	Appling County Public Library	OKRL-APPL	999/333
	Clinch County Public Library	OKRL-CLNCH	999/333
	Pierce County Public Library	OKRL-BLMEM	999/333
HQ	Waycross-Ware County Public Library	OKRL-WWC	999/333
Peach Public Libra			
	Byron Public Library	PPL-BPL	666/222
HQ	Thomas Public Library	PPL-TPL	666/222
Piedmont Regiona			
	Auburn Public Library	PIED-AUB	111/111
	Banks County Public Library	PIED-HOM	111/111
	Braselton Library	PIED-BRL	111/111
	Commerce Public Library	PIED-COM	111/111
	Harold S. Swindle Public Library	PIED-NIC	111/111
	Jefferson Public Library	PIED-JEF	111/111
	Maysville Public Library	PIED-MAY	111/111
HQ	Piedmont Regional Library	PIED-WIN	111/111
	Piedmont Regional Library Bookmobile	PIED-BKM	111/111
	Pendergrass Public Library	PIED-PEN	111/111
	Statham Public Library	PIED-STA	111/111
	Talmo Public Library	PIED-TAL	111/111

Pine Mountain Red	gional Library System		
i ino mountain reș	Butler Public Library	PMRLS-BPL	999/999
	Extension Services	PMRLS-EXT	999/999
	Greenville Area Public Library	PMRLS-GPL	999/999
	Hightower Memorial Library	PMRLS-HML	999/999
HQ	Manchester Public Library	PMRLS-MPL	999/999
1100	Reynolds Community Library	PMRLS-RCL	999/999
	Talbot County Library	PMRLS-TCL	999/999
	Yatesville Public Library	PMRLS-YPL	999/999
Roddenbery Memo	orial Library System	1 WINCES 11 E	000,000
HQ	Roddenbery Memorial Library	RML-MAIN	888/444
Sara Hightower Re			
	Cave Spring Branch	SHRL-CS	333/222
	Cedartown Branch	SHRL-CD	333/222
	Outreach Collection	SHRL-BK	333/222
	Rockmart Branch	SHRL-RK	333/222
HQ	Rome-Floyd County Library	SHRL-RM	333/222
Satilla Regional Li	, ,		
<b>J</b>	Ambrose Public Library	SRL-AMBR	999/222
	Broxton Public Library	SRL-BROX	999/222
HQ	Douglas-Coffee County Library	SRL-DOUG	999/222
	Douglas-Coffee County Library Bookmobile	SRL-BKMO	999/222
	Nicholls Public Library	SRL-NICH	999/222
	Pearson Public Library	SRL-PEAR	999/222
	Willacoochee Public Library	SRL-WILLA	999/222
Screven-Jenkins F	Regional Library		
	Jenkins County Elementary School	SJRLS-JCES	777/555
	Jenkins County High School	SJRLS-JCHS	777/555
	Jenkins County Memorial Library	SJRLS-JCML	777/555
HQ	Screven County Library	SJRLS-SCL	777/555
	Screven County Library Bookmobile	SJRLS-BKM	777/555
South Georgia Re			
	Allen Statenville Library	SGRL-ECHOLS	888/111
	Bookvan	SGRL-BOOKVAN	888/111
	Johnston Lakes Library	SGRL-LAKES	888/111
	McMullen Southside Library	SGRL-SSIDE	888/111
	Miller Lakeland Library	SGRL-LANIER	888/111
	Salter Hahira Library	SGRL-HAHIRA	888/111
	Talking Book Center	SGRL-TBC	888/111
HQ	Valdosta-Lowndes County Library	SGRL- VALDOSTA	888/111
Southwest Georgi	a Regional Library		1
HQ	Gilbert H. Gragg Memorial Library	SWGRL-DEC	888/555
	Gilbert H. Gragg Memorial Library/Bookmobile	SWGRL-BKM	888/555
	Miller County Public Library	SWGRL-MIL	888/555
	Seminole County Public Library	SWGRL-SEM	888/555

Statesboro Region	nal Library		
	Evans County Library	STRL-CLAX	77-44-11
	Franklin Memorial Library	STRL-SWAIN	77-44-66
	L.C. Anderson Library	STRL-METT	77-44-22
	Pembroke Public Library	STRL-PEMB	77-44-33
	Richmond Hill Public Library	STRL-RHILL	77-44-44
HQ		STRL-SBORO	77-44-55
Thomas County P	ublic Library System		1
_	Boston Carnegie Library	TCPLS-BOS	888/000
	Coolidge Public Library	TCPLS-COOL	888/000
	Meigs Public Library	TCPLS-MEIGS	888/000
	Gladys M. Clark Public Library	TCPLS-OCH	888/000
	Pavo Public Library	TCPLS-PAVO	888/000
HQ	Thomas County Public Library	TCPLS-THOMAS	888/000
Three Rivers Region		<u>.</u>	
_	Brantley County Library	TRRLS-BRANT	999/444
	Camden County Public Library	TRRLS-CAMDN	999/444
	Charlton Public Library	TRRLS-CHARL	999/444
	Hog Hammock Library	TRRLS-SAPLO	999/444
	Ida Hilton Public Library	TRRLS-MCINT	999/444
	Long County Library	TRRLS-LONG	999/444
	St. Mary's Library	TRRLS-STMRY	999/444
HQ	Three Rivers Regional Library	TRRLS-BKM	999/444
	Wayne County Library	TRRLS-WAYNE	999/444
Troup-Harris Region	onal Library		
	Harris County Public Library	THRL-HC	666/444
	Hogansville Public Library	THRL-HOG	666/444
HQ	LaGrange Memorial Library	THRL-LAG	666/444
	Williams Memorial Library	THRL-WMS	666/444
Twin Lakes Library	y System		
	Floride Allen Library	TLLS-FAL	777/777
	Lake Sinclair Library	TLLS-LS	777/777
HQ	Mary Vinson Memorial Library	TLLS-MV	777/777
Uncle Remus Reg	ional Library System		1
	Eatonton-Putnam County Library	URRLS-PU	555/222
	Greene County Library	URRLS-GR	555/222
	Hancock County Library	URRLS-HA	555/222
	Jasper County Library	URRLS-JA	555/222
	Monroe-Walton County Library	URRLS-MR	555/222
	Morgan County Library	URRLS-MA	555/222
	O'Kelly Memorial Library	URRLS-OK	555/222
	Uncle Remus Regional Library System	LIDDI O LIO	FFF/000
	Headquarters	URRLS-HQ	555/222
	W. H. Stanton Memorial Library	URRLS-SC	555/222
	Walnut Grove	URRLS-WG	555/222

West Georgia Regional Library System			
	Betty C. Hagler Public Library	WGRL-LS	333/111
	Buchanan Haralson County Public Library	WGRL-BU	333/111
	Crossroads Public Library	WGRL-CR	333/111
	Dog River Public Library	WGRL-DR	333/111
	Douglas County Public Library	WGRL-DC	333/111
	Ephesus Public Library	WGRL-EP	333/111
	Heard County Public Library	WGRL-FR	333/111
	Maude P. Ragsdale Public Library	WGRL-MR	333/111
	Mount Zion Public Library	WGRL-MZ	333/111
HQ	Neva Lomason Memorial Library*	WGRL-HQ	333/111
	Neva Lomason Memorial Library/Bookmobile	WGRL-BKM	333/111
	New Georgia Public Library	WGRL-NG	333/111
	Paulding County Public Library	WGRL-PC	333/111
	Tallapoosa Public Library	WGRL-TA	333/111
	Villa Rica Public Library	WGRL-VR	333/111
	Warren P. Sewell Memorial Lib.of Bowdon	WGRL-BO	333/111
	Warren P. Sewell Memorial Lib.of Bremen	WGRL-BR	333/111
	Whitesburg Public Library	WGRL-WB	333/111
Worth County Library			
HQ	Worth County Library	WORTH-SYLV	999/666