

# PINES Circulation Policies and Procedures Manual



## Information for Libraries during the COVID-19 Closure

PINES libraries have uniform circulation policies and procedures. According to the PINES Executive Committee, this is a condition of participation [1999.05]. The procedures outlined herein represent the decisions of the PINES Executive Committee. Some 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].

PINES Circulation Policies are approved by the PINES Executive Committee with input by the PINES Subcommittees and the PINES Library System Directors. Any PINES Library System Director may suggest a change to the existing policy to the Executive Committee for review.

## 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 in 2010 by a dedicated workgroup made up of 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. In July of 2017, the manual was moved from a standard Word document format to a Wiki format in order to improve change tracking.

[About the 2010 PINES Circulation Policies & Procedures Project](#)

## Annotations

The policy has been edited with bracketed inline annotations (e.g., “[2014.05]”) 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.

[Meeting Agendas and Notes](#)

## Downloadable PDF of This Manual

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# Confidentiality

**Georgia Confidentiality Law:** The Georgia Law ([O.C.G.A. 24.12.30. Confidential nature of library records](#)) 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.

**Confidentiality of Patron Information:** Patron data such as email address, phone number or mailing address cannot be used for purposes other than PINES transactions initiated by library patrons. Board of Regents legal counsel has indicated that in their opinion that state and federal privacy laws prevent use of PINES patron records for any business other than library transactions initiated by the patron. Allowable use of data may include overdue notices, preinders, holds notices. Patron information may not be used for county mailings, Friends of Libraries solicitations, and unsolicited e-mail communications from the library staff [2009.05].

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# Registering Workstations

Before Evergreen can be used, a “workstation” must be registered. This process assigns a name to the workstation that gets recorded in the activity / auditing logs in the Evergreen database and also affects what information you will see on certain screens. Most computers will only need a single workstation name set up. However, it is possible to set up multiple workstation names associated with different branch locations for those staff members who do work for multiple branches (such as catalogers or local administrators).

Workstations can only be registered by staff members with a LibraryManager or LocalAdmin type of account. If a computer has multiple Windows logins (a different Windows login for each staff person that uses it), then a workstation will have to be registered for each one (however, it can be the same workstation name if you want settings to be the same).

To register the first workstation on a computer, simply log in with a LibraryManager or LocalAdmin account. You will be prompted to register a workstation before proceeding further.



If a workstation cannot be registered, verify that the date/time/time zone on the computer are correct, and that JavaScript and Cookies are enabled in the browser.

## Register a New Workstation For This Browser

ARL-ATH ▾

circ1|

Register

## Workstations Registered With This Browser

STATELIB-L-terran (Default) ▾

Use Now

Mark As Default

Remove

Workstation Registration

## Registering Multiple Workstations

Staff such as LocalAdmins and Catalogers that support multiple locations, may have a need to log in as if they are at a different location. To do this, they may register workstations for each required location:

1. In Evergreen, go to Administration > Workstation > Registered Workstations.
2. Under “Register a New Workstation for This Browser” select the appropriate branch and type in a workstation name.

3. Click Register.
4. Log out. The login screen should now show the new workstation in the dropdown list of registered workstation names.

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# Default Search Library

Whether you prefer your catalog searches from within the staff client to default to all of PINES, to your regional library system, or to a specific branch, you may set your preference on the Workstations page.

1. Click on Administration.
2. Click on Workstation.
3. Select using the Default Search Library Dropdown.
4. (There is no Save button, it will automatically save your preferences when you make the selection.)

The screenshot shows the Administration page in the PINES staff client. The navigation bar includes Search, Circulation, Cataloging, Acquisitions, and Administration. The user is logged in as terran @ STATELIB-A-terran in English (US). The left sidebar lists various settings: Registered Workstations, Printer Settings, Print Templates, Stored Preferences, Print/Storage Service ("Hatch"), and Tests. The main content area is titled "Default Search Library" and contains three sections:

- Default Search Library:** A dropdown menu is set to "PINES". The text below explains that this setting determines the default library for searches on the advanced search screen and portal page. Manual selection overrides this default.
- Preferred Library:** A dropdown menu is set to "Select...". The text explains that this library is used to show copies and URIs regardless of the library searched, and it is recommended to set this to the workstation library for local copies to appear first.
- Advanced Search Default Pane:** A dropdown menu is currently blank. The text explains that advanced search has secondary panes for Numeric and MARC Expert searching, and users can change the default pane here.

At the bottom of the settings area, there is a "Disable Sounds?" checkbox and a "Test:" button with four colored options: Success (green), Info (blue), Warning (orange), and Error (red).

## Default Search Library

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<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:workstations:search>

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# Function Bar

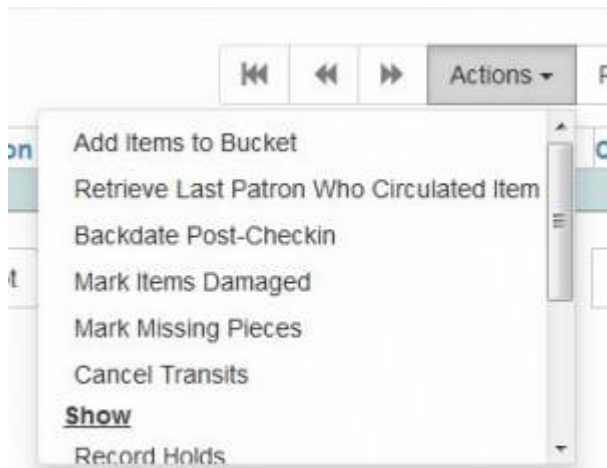
Pages that show tables of data (patron search results, checkin screens, holds pull lists, etc.) have function bars across the top of them similar to this one:



## Function Bar

Paging controls are located to the upper-right of the table, with arrows to navigate from page to page of results and a Page dropdown to jump to a specific page. The "Rows 100" dropdown in the example allows you to control how many rows you wish to see at once.

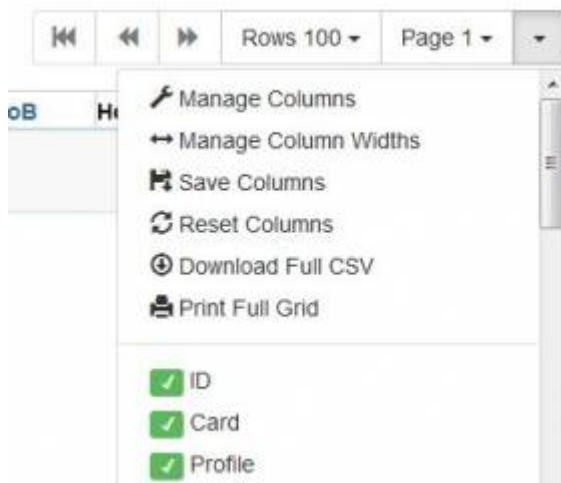
Some pages will also present you with action buttons (such as the Add to Bucket and Merge Patrons buttons shown in the example above, or the Actions dropdown shown in the example below). You must use the checkboxes in the table to select at least one row before you can use the action buttons.



## Action Menu

# Column Configuration

To the far right of the paging controls, the single dropdown arrow on the right presents you with various column configuration options.



### Column Picker

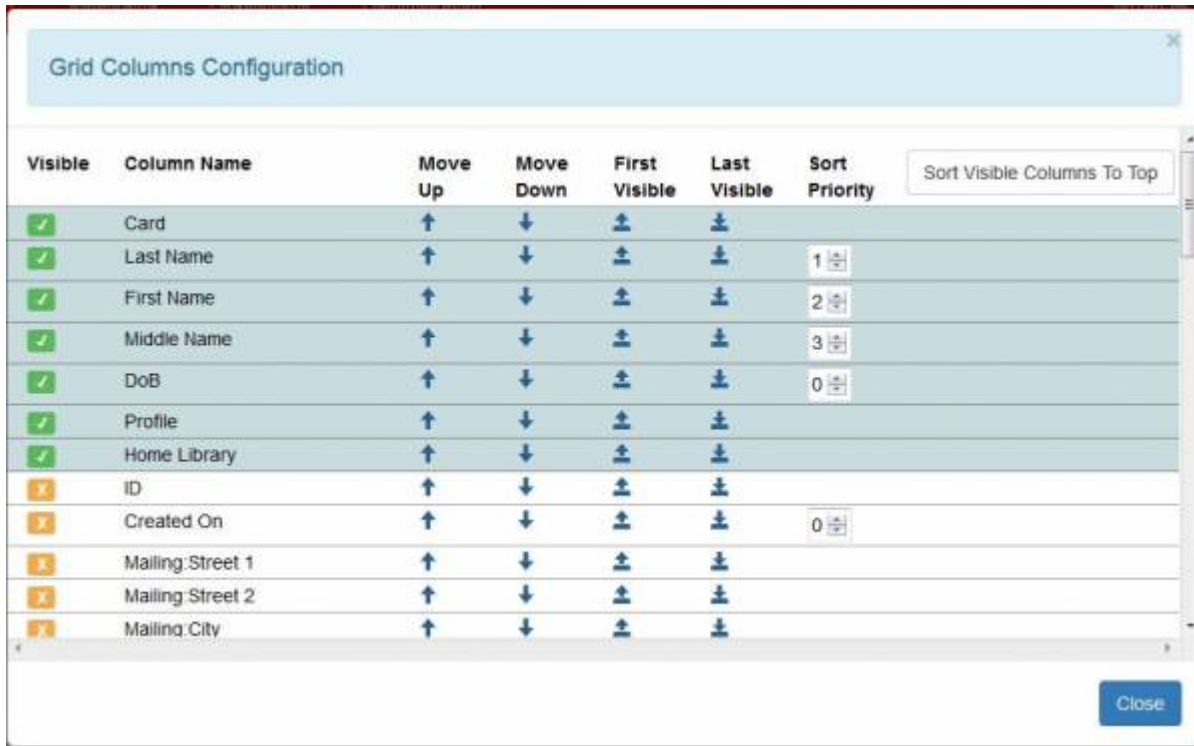
Various search results tables may not default to the most useful columns. For instance, the patron search results page may be easier to use if you change the columns to Card, Last Name, First Name, Middle Name, Dob, and Primary Identification, and you may wish to have the results sort by Last Name, then by First Name.

### To customize your columns:

First:

1. Click on the dropdown arrow at the top-right of the grid.
2. Click on Manage Columns.
3. Use the checkboxes in the Visible column to select which columns to display or hide.
4. Use the up and down arrow buttons to control the order in which your columns should appear.
5. Use Sort Priority (if available) to prioritize how sorting should work. (A negative number will sort the column in reverse order.)
6. Click Close.





Manage Columns

Next:

1. Click on the dropdown arrow at the top-right of the grid.
2. Click Manage Column Widths
3. Use the arrows to expand or shrink each of the columns so that the content displays as you wish.
4. When satisfied, click on the dropdown arrow again and click Save Columns.

### Reset Columns:

If you wish to clear your customizations and switch back to the default, click the dropdown arrow and then click Reset Columns.

## Downloading or Printing Results

Every grid (aka, table) in the staff client has the option to Download Full CSV available from the dropdown arrow on the function bar. This will download all of the records in the grid regardless of whether or not all of the records are currently visible. For example, if you do a patron search and retrieve 65 patrons but have your Rows set to 25, you will only see 25 patrons per page, but clicking Download Full CSV will download all 65 patron records to a CSV file which can then be opened in Excel. When the CSV file downloads it will download data for whatever columns you have visible.

Likewise, the option for Print Full Grid will also print the visible columns for all of the retrieved records even if they span multiple pages.

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# Shortcut / Function Keys



There are some pages in the staff client that use embedded content (the catalog is an example of this). The shortcut keys will not work properly if you are on one of these pages and your mouse cursor context is inside of the embedded content. If you click in the white space around the edge of the page outside of the embedded content, the shortcut keys will then work.

Shortcut Key	Description
F1	Check Out
F2	Check In
F3	Search Catalog
F4	Search Patrons
F5	Item Status
F6	Record In-House Use
F8	Retrieve Last Patron
F9	Reprint Last Receipt
Shift-F1	Register Patron
Shift-F2	Capture Holds
Shift-F3	Search for Record by TCN
Shift-F8	Retrieve Last Record
Ctrl-F2	Renew
Ctrl-N	New Window
Ctrl-T	New Tab
Ctrl-W	Close Tab
Ctrl-Shift-T	Undo Close Tab (open last closed tab)
Ctrl-F5	Refresh / Reload Page
Ctrl-Tab	Switch between browser tabs (from left to right)
Ctrl-Shift-Tab	Switch between browser tabs (from right to left)
Ctrl-1	Switch to the First Tab
Ctrl-9	Switch to the Last Tab
Home	Go to Top of Page
End	Go to Bottom of Page

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# Change Operator

If you click on the menu button on the upper-right corner of the interface, you'll see an option for "Change Operator."

The operator change dialog allows the selection of a Temporary, Staff, or Permanent authtoken.

## Temporary

Temporary logins expire within a few minutes of inactivity. This could be used when a Circulation staff person needs a Library Manager to log on in order to create another workstation, or it could be used for quick testing purposes. Use the Restore Operator option to return to the original user.

## Staff

Staff is a normal staff login, but still allows the option to switch back to the original user.

## Permanent

Permanent completely logs out the original user and does not offer the option to switch back.

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<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:workstations:operator>

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# Patron Account Information

## General Policies

- Proper identification must be presented to register [1999.05]. (See: [Acceptable Forms of ID](#))
- A library card is required in order to check out materials [1999.05, 2010.09]. Library card barcodes may also be scanned from handheld devices [2014.05]. (See: [Scanning Barcodes from Mobile Devices](#))
- Applicants for a card must complete and sign an application form, available at any PINES participating library's circulation desk. Alternatively, applicants may fill out an online application form prior to visiting the library to present their identification and complete their application [2014.05].
- Patron account information is confidential and cannot be used for purposes other than PINES transactions. (See: [Confidentiality](#))
- Patrons who are unable to visit the library due to physical disability may complete and sign an application form that may be mailed to the patron from his/her participating library or printed from the PINES application form. The applicant will make copies of his/her identification to be attached to the application form. The identification and application should be mailed to the local participating library. The participating PINES library will process the application and send a library card and any other materials typically shared with new patrons by mail to the patron. Copies of patron's identification documents will be shredded after the new card is issues [2019.05]. Note: As per PINES Executive Committee discussion while approving this policy, the library will create a normal Patron account (not Homebound or GLS).
- [Sample Library Card Application Forms](#)

## Residency

- 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.

## Responsibility

- 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 legal guardian must show proper ID to register a child. A parent or legal 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.

## Acceptable Forms of ID

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):

1. Photo ID showing current local address, OR
2. Photo ID and one item from approved list (see below) showing current, local address (if photo ID does not have correct address), OR
3. 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 (e.g., gas, electric, cable, internet, water/sewer, waste management)
- Tax receipt or other piece of mail that shows the user's name and present address.

Original documents are required with the exception of utility bills: because many people now pay their utility bills online and no longer receive them on paper, patrons may present their online bill or statement on their mobile device or printed from their utility's web site [2015.12].

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].

## Record Retention Policies

The legal department of the Board of Regents has indicated that public libraries are not mandated to follow the USG data retention schedule for "Courtesy Borrowers Records" (a.k.a library patron applications) [2014.09 BOR communication to the PINES Program Director]. Each library system should develop its own record retention policies in accordance with the Secretary of State policy for voter registration. Whether that information is recorded electronically or on paper forms is determined by each library system.

- [Secretary of State's Policy on Voter Registration](#)
- [Georgia Records Act](#)
- [Local Government Retention Schedules](#)

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<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts>

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# Creating New Patron Accounts

**1. Check for Existing Accounts:** To avoid creating a duplicate record, library staff should always search for the patron's name in the Evergreen patron database 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: [Updating Accounts](#))
- If a patron has lost his or her card, issue a replacement card and charge the replacement fee. (See: [Lost Cards](#))

**2. Create New Account:** If the name is NOT found in the database, open the Register Patron screen. The PINES user record can contain as many addresses as necessary, and notes and comments that display to all PINES facilities. 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 (See: [User Permission Groups](#))
- Privilege Expiration Date
- Internet Access Level
- Address (Type, Postal Code, Street (1), City)
- Response to the Voter Registration Survey Question (See: [Voter Registration Survey](#))
- See Also: [Account Registration Field Descriptions](#)



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. If staff wishes to record a nickname for local use, it could be added to the Alerts field.

**3. Save:** 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.

**4. Records Retention:** Follow local policy for storing signed applications. (See: [Record Retention Policies](#))

## Patron Self-Registration Form

PINES rolled out a new automated e-card registration process on September 8, 2020. This eliminates the previous pending patron account process to provide better service to patrons and reduce work for library staff.

1. When a patron successfully submits the online application form ([Patron Self-Registration Form](#)), the system creates an account which provides immediate access to e-resources. This account is valid for 1 year, but does not allow holds or checkouts.
2. To obtain a full PINES card, the patron will come into the library and provide their e-card number and proof of ID.
3. Staff should then:
  1. Check for duplicate accounts.
  2. Check the provided ID/documentation to verify that the information on the account is correct and up to date.
  3. Give the patron a PINES card and update the barcode in the account.
  4. Change the permission group from Quipu to Patron.

## Cloning a Patron with the Same Address

When a member of a family residing at the same household as an existing member is registering for an account, the Save and Clone function can be used. The cloned patrons will automatically be grouped with the first patron.

1. Register the first family member using the procedure outlined above (or, Edit the account of an existing family member).
2. Click Save and Clone.
3. Complete the patron information as normal, modifying the information that was filled in automatically as needed.

## Sample Registration Forms

- Sample Patron Form 1 (Text Only):

English

|

Spanish

- Sample Patron Form 2 (Formatted):

## Editable Word Document

- Sample Institution Forms:

PDF Form

Sample 1

Sample 2

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<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

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[https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:new\\_patron\\_accounts](https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:new_patron_accounts)

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# Patron Registration Form 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, the system will create a randomly-generated PIN. Staff should provide the PIN to the patron with instructions to set a new password for themselves via the OPAC and encourage them to do so as soon as possible.
- **Primary Name (ie, Legal Name)**
  - **Prefix/Title** - Optional (Use for Mr., Ms., Dr., etc.)
  - **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 strongly encouraged to enter full first, middle and last names. The legal name of the patron should be entered as shown on their ID. No nicknames should be added or listed here (see Preferred Name and Name Keywords below). 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].



If the patron does not have a middle name, leave the field blank. Do **not** enter “NMN” or “No Middle Name.” If you wish, you may add a note on the account that the patron does not have a middle name.

- **Suffix** - Optional. 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.
- **Preferred Name**
  - The same fields are available in the Preferred Name tab as in the Primary Name tab. Use to enter the name that the patron prefers to be known by if it is different than the legal name (nickname, middle name, alternate name, etc.) This name will appear in the patron's OPAC “My Account” view, on Hold Slips, and on the Patron Summary Bar underneath the legal name. [Feature added 2019.01]
- **Name Keywords** - Optional. Use this field to store other names the patron is or has been known by, previous married names, or other keywords which should be searchable. For example, your library may wish to enter 'fol' for all of your patrons who are members of your Friends of the Library group. These words may be searched in the new Keyword patron search field. [Feature added 2019.01]
- **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 MM/DD/YYYY, 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 “01/01/1901” 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).
- **Parent/Guardian** - This field is required for juvenile accounts, as the person signing the application form for the juvenile is accepting responsibility for that library card.



**Best Practice:** Enter the parent or guardian's name followed by the relationship ("Jane Smith, Mom"). The parent or guardian's ID should be entered in the Primary Identification field.

- **Primary Identification Type** - Staff may choose either Driver's 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 driver's license number in the specified format (GA-XXXXXXXX), substituting the appropriate state abbreviation (e.g., FL, AL, SC, TN) for non-Georgia drivers licenses. If the driver's license was not used for primary identification, enter relevant information and explain in the Alert Message field if necessary.



**Driver's License Format:** It is crucial that driver's licenses are entered in a consistent format in order to alert staff to duplicate accounts. All driver's licenses should begin with the two-letter state abbreviation followed by a dash and then the number ("GA-123456789").



**Best Practice:** If the ID is a driver's license from a state that uses dashes or other characters, enter it as the two-letter state abbreviation followed by a dash and then the number as it is typed on the ID ("FL-123-456-78-9-0").



**Best Practice:** If the ID used is not a driver's license, enter the unique alpha-numeric portion of the ID and then follow it by a brief description of the type of ID. For example, "123456789 Military" or "123456789 US Passport". This way, if that ID is presented again at a later date, the staff can search just for the first portion ("123456789") without needing to know exactly how the description was entered.



**Best Practice:** If the ID belongs to a parent or guardian, enter it in the Primary Identification Field and then enter the name in the field below.

- **Secondary Identification Type** - Use only when a second piece of identification is required.

- **Secondary Identification** - Use only when a second piece of identification is required.
- **Email Address** - Staff should encourage PINES users to provide email addresses for the benefit of receiving automated hold, overdue, and reminder (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).



If the patron does not provide an email address, leave the field BLANK and UNCHECK the Email option in the Hold Notification Preferences section.

- **Email checkout receipts by default?** - If this box is checked, patron will automatically receive emails instead of printed receipts at checkout time. (Staff may choose to print out a copy as well.) [Feature added 2018.01]
- **Daytime Phone** - Day telephone number including area code. This is the patron's preferred phone number of contact and will be used for automated telephone notifications. When setting up a new account, Evergreen will automatically assign the last four digits of this phone number as 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. Some library systems may choose not to use certain profiles (for example, Friend or Trustee). Library systems may also wish to direct Circulation staff to seek approval from a manager before assigning certain profiles (such as Homebound or GLS) - this would be a matter of local policy rather than a permissions setting in the system. (See: [User Permission Groups](#))
- **Privilege Expiration Date** - Automatically set based on the Profile Group, but may be edited by staff to a closer date if necessary. The date should not be entered for a later date than that which is automatically selected.
- **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: [Barred Patrons](#))
- **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).

- **Default SMS/Text Number** – Default phone number to be used if SMS/Text notification option is selected for a hold.
- **Default SMS/Text Carrier** – Phone service provider that the patron’s Default SMS/Text Number is associated with. Some carriers are not listed because they will not accept SMS messages from the Evergreen server.
- **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**
  - [Postal Addressing Standards](#)
  - 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.”
  - 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).
  - Street (1) - The number and street for the address.
  - Street (2) - Apartment, Lot, Suite, or additional address information.
  - City - City of residence.
  - County - County of residence (optional, but auto-populated by Postal Code entry). Although optional, this is useful for statistical reports.
  - State - State of residence (if a Georgia Postal Code is entered, defaults to GA).
  - Country - Country of residence (defaults to USA).
  - Valid Address? - Checked by default. May be edited if an address is found to be invalid.
  - 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.
  - 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 Surveys may be created at the local library system level by the Local System Administrator.

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Last update: **2021/06/15 11:08**



# User Permission Groups

Each patron and staff account is assigned to a permission group (type of account) that controls what functions they can use and circulation rules may apply.

## Patrons Permission Groups

- **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, attend school, or own property within Georgia.
- **Digital Only** - This permission group provides access to electronic materials (databases, ebooks, etc.) that the library provides, but does not allow checkout of physical materials. Privilege is one year. This account type may be used at the library's discretion for cards that are created for students in partnership with schools, for deployed military, for patrons who cannot come into the library and/or only wish access to digital materials, and for patrons that are experiencing homelessness. [Pilot began May 2017. Updated May 2018 2018. Updated May 2019.]
  - See also: [More information about Digital Only accounts](#)
- **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.
- **GLS** - This profile type is restricted to patrons who are already registered with GLS and have a KLAS ID number. PINES staff can create these accounts, but most will be created and managed by AMLAS staff. GLS users are allowed up to 50 checkouts at a time. Privilege is for two years. Standard checkout period is for 30 days with 1 renewal. Homebound users are not billed overdue fines, but will be charged for lost, damaged, or long overdue items. 15 holds are allowed at once. GLS users may place holds on DVDs that have descriptive audio tracks and on large-print books, and these items will be routed to the AMLAS office (STATELIB-B) for packaging and shipping through the United States Postal Service's Free Matter for the Blind program. [2014.05 and 2014.07]
  - See also: [GLS Patron Profile Instructions](#)
- **Homebound** - Homebound users are individuals who are unable to visit a library in person without great difficulty and who either have materials delivered to them by a library's outreach department or picked up for them by a designated representative. Cards should not be issued to users that live outside of a library's service area. Individuals who assist the Homebound user by picking up materials from the library on behalf of the Homebound user should be listed in the account's Alert field. Homebound users are allowed up to 50 checkouts at a time. Privilege is for two years. Standard checkout period is for 30 days with 1 renewal. Homebound users are not billed overdue fines, but will be charged for lost, damaged, or long overdue items. 15 holds are allowed at once. [2014.05]
  - Each Library System's Director shall determine which of their staff members are permitted to create user accounts with the Homebound profile.
  - Libraries may use discretion in the case of a user who is able to visit the library but may need longer than a normal check-out period to process information.
  - Each library system shall determine whether Homebound cards are kept at the library or kept by the user or user's representative.

- Because each library system may decide how long to keep its own items on their own holds shelf, a library system may choose to decide to keep their own items for Homebound patrons on their holds shelf for a longer period of time to better assist patrons who are unable to pick up the items quickly. Libraries should not keep items from a different library system on their holds shelf longer than the standard maximum of 7 days.
- **Institution** – A library system may choose to issue an Institution card to any institution or organization with a regular daily population that is housed long term. Examples include school media centers, day care centers, nursing homes, assisting living facilities, and jails [2014.12].
  - Each library system shall develop an application form different from the standard patron application form that enters the institution into a legal contract with the library ensuring that the institution will take responsibility for any fines and fees. The application form must be signed by an authorized representative of the institution and should be approved by the Library System Director or an authorized representative of the library system. A library system should not issue an Institution card to any institution located outside the library's service area.
    - Example Form 1
    - Example Form 2
    - Example Form 3
    - Example Form 4
    - Example Form 5
  - When entering data into the account registration form, the name of the primary representative of the institution should be entered as the name on the account. The Institution's name should be entered as the first line of the Address. Any representatives of the institution who are authorized to check out materials on that card should be listed in the account's Alert field.
  - Privilege limit is 1 year. This user will be blocked if a total of \$10 or more is owed. User is not billed overdue charges, but is billed for Lost, Damaged, and Long Overdue items. User may have up to 50 items checked out at a time. User may have up to 50 holds at a time. Circulation period is 42 days with no renewals [2015.05]. Note: The 42-day circulation period was implemented 5/4/2015. Items checked out prior to this have a 30-day circulation period.
  - Library systems may choose to store an Institution's physical card at the library.
- **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.
- **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].
- **PLAY Card** - *This permission group should only be used during the automated batch loading of student accounts by PINES.* PLAY cards are limited to five checkouts at a time and to two holds at a time. Users are not charged overdue fines, but can be billed for lost, long overdue, and damaged materials as normal. Parents/guardians are responsible for these fines. The patron's home library will be responsible for lost or damaged materials and long-overdue fines not recovered by other libraries for their materials. The account expires after one year. [Pilot approved 2018.12, became available 2019.02, modified 2019.12, made permanent 2021.05.]

- [PLAY Card Documentation](#)

- **Quipu** - Patrons who register online get assigned a Quipu e-card that provides immediate access to e-resources, but no holds or checkouts. The account expires after 1 year. Patrons may upgrade to a full Patron card by coming into a library and presenting their ID/proof of address.
- **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.

**Restricted** cards are intended for temporary or probationary purposes. This may include seasonal workers, RV park residents, the homeless or in lieu of fully barring a patron from library use.



PINES should accept as proof of residency, a letter on official letterhead from agencies serving the homeless, temporary group homes (such as family violence shelters), and similar institutions.

- **StaffNoPerm** - A library user who has staff member privileges on borrowing items, but does not have staff-level permissions [2009.05].
- **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.
- **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.
- **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.

## Staff Permission Groups

Each staff member should generally be given the lowest level permission group which allows them to manage their responsibilities. Additional permissions may be granted to an individual to increase their access without moving them to a higher permission group (for example, a CIRC1 may also be granted the ability to create and run reports), but specific permissions cannot be removed from an individual without moving them to a lower permission group.

The Director of each library system must designate a Cat1 and a LocalAdmin. Those accounts can only be set up and updated by PINES staff. The LocalAdmin will manage the rest of that library system's

accounts.

## Chart of Staff Permissions



All staff accounts must have at least one Working Location set or some features of the staff client will not work properly. Working locations are set under Administration > User Permission Editor or from within the account at Other > User Permission Editor.

- **Acquisitions**

- ACQUADMIN, ACQFIN, ACQLIST, ACQREC, ACQSEL - Permissions are assigned and explained by PINES staff during Acquisitions training

- **Cataloging**

- CatCoord - *Coming in 2019*
- Cat1 - Library staff must be trained by PINES staff prior to being given Cat1 permission, and each library system must have a designated Cat1 who is responsible for overseeing all of that library system's cataloging functions. Cat1 accounts can only be updated by PINES staff at the request of the library system's Director.
- Cat2, Cat3 - Other technical services staff whose permissions are managed by a library system's Cat1.

- **Circulation**

- LibraryManager - Each library system designates LibraryManagers (usually branch managers or circulation department managers) who have all circulation-related permissions. These accounts are managed by a library system's LocalAdmin.
- Circ1, Circ2, Circ3, Circ4 - Varying levels of circulation staff. These accounts are managed by a library system's LocalAdmin.

- **LocalAdmin**

- Each library system designates a LocalAdmin (usually the library system's technical lead / system's administrator).

## Permission Groups No Longer In Use

- **Class** - This is no longer used in PINES [2003.02].
- **Homeschool** - The Executive Committee rejected the creation of a new Homeschool profile with additional permissions beyond that of a standard Patron profile [2014.05]. Homeschool students should be assigned the standard Patron profile.
- **Outreach** - This is no longer used in PINES [2014.12].

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# 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].

Libraries may choose to use shared logins for circulation staff, but using individual logins for each staff member allows for better tracking and accountability. If a shared login is used, the password should be changed when anyone who uses that shared login leaves employment. If individual logins are used, the account should be changed from a staff account to a patron account if the staff member leaves employment.

Staff with a 'Library Manager' account may update circulation staff accounts. Staff with a 'Local Admin' account may update all other types of accounts except Cat1 accounts. Local Admin accounts may only be created by PINES staff at the request of the library director, and Cat1 accounts may only be created after a staff member has successfully completed required Cat1 training. Staff with Local Admin or Cat1 accounts should submit help desk requests when the accounts need to be renewed or otherwise updated.

Although staff members cannot edit their own accounts in the staff client, they may log in to the [My Account](#) portion of the online catalog to update their password, search preferences, etc.

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].



Staff need to have at least one Working Location set. To set the working location, go to the staff account and click Other > User Permission Editor, then select the appropriate location(s).



Staff should read, agree to, and sign the [PINES Code of Ethics](#).

See also: [Staff Permission Groups \(aka Profiles\)](#)

## When A Staff Member Leaves Employment

When a PINES staff member leaves employment, his or her account should be immediately changed from a staff permission group to the standard Patron permission group. The email address and other contact info should be updated to reflect personal rather than business information.

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# Creating Staff Users and Assigning Permission Profiles

Local Admins have overall responsibility for creating, updating, and maintaining all staff accounts for their system except for CatCoord, Cat1, and LocalAdmin accounts. CatCoord, Cat1 and LocalAdmin accounts may only be created and updated by PINES staff at the request of the library system's Director. CatCoord and Cat1 accounts require specialized training by the PINES Cataloging Specialist before being created.

The PINES/GPLS staff strongly recommends the use of personalized Evergreen accounts for logging into staff functions. This eases troubleshooting and allows library staff to audit particular staff members actions, and provides a more secure and accountable system. Use of generic logins (e.g. "WGRL-HQ-Circ1" and the like), is strongly discouraged.

- [Types of Staff Permission Groups](#)
- [Policies Regarding Staff Accounts](#)
- [Permissions Spreadsheet](#)

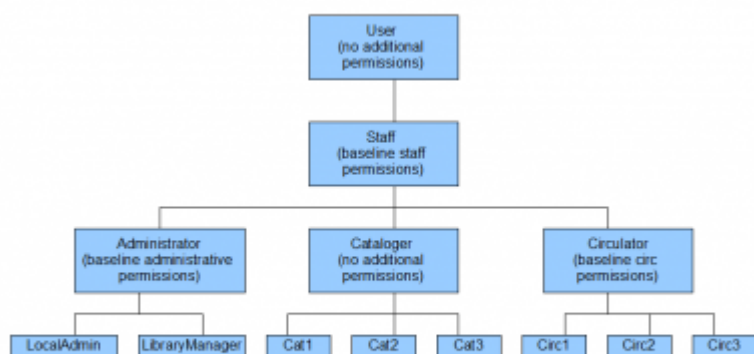


It is important to remind library staff members that their personal library cards and their staff accounts are one and the same. Some staff users have gotten confused when they change their password via the OPAC and are then unable to login to the staff client, for instance.

## Hierarchical Permission Structure

Evergreen employs a hierarchical permissions structure in which "child" groups inherit permissions settings from "parent" groups. The basic group is "User", which contains all Evergreen users. Above the "User" level are subcategories, including "Staff," which contains a set of permissions that is inherited by all "Staff" group members. "Staff" is subdivided into "Administrator," "Cataloger," and "Circulator," and each of these levels may also contain permissions that are inherited by their subgroup members. In the case of the "Administrator" group, a base set of administrative permissions is granted to the "GlobalAdmin," "LocalAdmin," and "Library Manager" permissions groups, which are then assigned to individual users. See the diagram below for a visual representation of this structure.





Evergreen Permissions Hierarchy



Assigning a permissions group to a user grants them all of the permissions in the tree. This means that a LibraryManager assignment equates to granting all permissions in User + Staff + Administrator + LibraryManager, inclusive.

## Permissions Scopes

Evergreen permissions are “scoped,” meaning that “boundaries” are set to limit staff actions to a single system or branch. In PINES, there are three scopes: 1. Consortium: the permission applies to the staff member at any location in PINES. 2. System: the permission applies to any location within the library PINES Local System system at which the staff member works 3. Branch: the permission applies to the individual library at which the staff member works.

## Adding Custom Permissions

Staff users are assigned a set of permissions and for the Administrator class of users, some of those permissions are grantable. A grantable permission is one that an administrative user can grant individually to a single user. This is done in the Administration > User Permission Editor interface by entering the user's library card barcode and adding checkboxes beside the appropriate permissions.



Though LocalAdmins have the ability to grant permissions, PINES/GPLs staff recommends caution when doing so, as customized permissions may cause problems down the line. For example, if a staff member changes employment positions at a library, her/his permissions profile group may change, but any custom permissions will continue to be assigned unless manually removed by the LocalAdmin. It would be beneficial to keep a record of such individualized changes.

Locally-assigned permissions override permissions assigned “higher up” in the hierarchy. For example, if the Circ2 profile has VIEW\_USER assigned at the Consortium scope, and you assign that same permission to a specific Circ2 at the Branch scope, that staff member will be limited to viewing/accessing user

accounts at her/his branch.

Permissions assigned at the permissions profile group level are not able to be removed on a per user basis. LocalAdmins must assign a profile with fewer permissions to decrease the permissions level of a user.

## Context Matters: Working Location and Workstation

### Working Location

Evergreen permissions rely on the user's "working location" which is set under Administration > User Permissions Editor (or, from the staff person's account page under Other > User Permissions Editor).

For staff such as LocalAdmins or Cat1s, who may need to administer or perform work at more than one location, each relevant location must be selected.

### Workstation

The other context Evergreen uses is the workstation location. See [Workstation Documentation](#) for more information.

## Personal Device Policy

If an employee needs to use a personal device to access the PINES staff client or PINES data, see:

[PINES Personal Device Policy](#)

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<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

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<https://pines.georgialibraries.org/dokuwiki/doku.php?id=admin:staffaccounts>

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# Editing / Updating Patron Accounts

## Updating a Patron Record

To edit a user record, retrieve the patron record (Search > Search for Patrons). Verify that all information is up to date and in the correct format. See: [Patron Registration Field Descriptions](#)

## Card Expiration and Renewal

Most types of 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. Patrons can see their own expiration dates when logging into “My Account” via the OPAC. Patrons that include an email address in their account will be sent an automated courtesy notice 30 days prior to their account expiration date.

At renewal 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 or update the patron’s email address, and confirm that the user’s full name is entered. Be sure to correct any typos or capitalization problems in the record, and verify that the Driver's License is in the correct format (GA-123456789).



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

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.

## 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 in the user record must be unchecked. Staff should do this whenever mail is returned.
2. The patron record will be marked with an (Invalid Address) message.
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 a PINES Patron Moves to Another PINES Library System

If a 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 if they wish to, however it is recommended that staff replace the patron's card with one from the new library system, as electronic reference database access is often based on 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.

## 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, the best practice is to:

- Change the name on the patron account to first name "Deceased" and last name "Patron"
- Delete the driver's license number or ID, as well as any other personally identifiable information.
- Mark the phone number and email address (if present) as invalid.
- Change the account expiration date to a past date.
- Uncheck the Active box.

This will effectively anonymize that person's account without affecting circulation or billing history.

## When A Staff Member Leaves Employment

When a PINES staff member leaves employment, his or her account should be immediately changed from a staff permission group to the standard Patron permission group. The email address and other contact info should be updated to reflect personal rather than business information.

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Last update: **2019/09/11 16:09**

# 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:

- I am already registered to vote
- I want to register to vote
- I do not want to register to vote
- I do not wish to register to vote, but will take a registration form home
- 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.

## Mailing in Voter Registration Applications

To ensure timely processing of applications, completed voter registration applications must be mailed to the Secretary of State's office:



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.

- Election calendars can be found at: <http://www.sos.ga.gov/electionconnection>
- 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
  - Address
  - Phone Number

More information may be found at the Georgia Secretary of State's website:

[http://sos.ga.gov/index.php/Elections/election\\_connection](http://sos.ga.gov/index.php/Elections/election_connection) (click on the Public Libraries link)

Information from the head of the Elections Division of the Secretary of State's office given to the State Librarian:



If an individual registering to vote does not have ID, you should accept the registration and submit it. The best practice is to take whatever they give you; it is their responsibility, not yours, to ensure proper completion of the form and presentation of ID. The county registration office will flag the account, and the voter will be required to show ID upon first instance of voting.

## Reporting Registration and Declination Numbers

Libraries must report to the Secretary of State's Office regarding the numbers for those registering to vote and those declining; there are two options for reporting this information.

1. Libraries may use the Daily Recap Forms furnished by the Secretary of State's Office ([click here to download the Daily Recap Form](#)); these must be mailed at least weekly except in the period beginning 15 days prior to the registration deadlines when they must be mailed daily; OR
2. Libraries may e-mail the number of newly registered voters and those declining to register to vote to **Rachell Simmons at [rsimmons@sos.ga.gov](mailto:rsimmons@sos.ga.gov)**. (Rachell can be reached by phone at 470-312-2755 if you have questions.) This information must be emailed at least weekly except in the period beginning 15 days prior to the registration deadlines when the numbers must be e-mailed daily and the completed voter registration forms must be mailed daily.

If you wish to pull the numbers from the PINES database, you can use this report in PINES Quick Reports:

- Quick Reports > Patrons > Voter Registration Survey Responses

## Additional Information and Instructions

- [Voter Registration Procedures for PINES Libraries \(PowerPoint from Secretary of State's Office\)](#)
- [Download the Daily Recap Form](#)
- [Secretary of State's 'Election Connection' site for additional information](#)
- [Form to order prepaid envelopes for the SOS office](#)

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Last update: **2019/12/05 11:57**

# 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 server process runs nightly which identifies inactive patrons and marks them as such.

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, 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 wi-fi access
- E-books or audiobook downloads
- GALILEO databases (whether or not authenticated through the OPAC).
- Logging into a user account in Evergreen

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# Blocked and Barred Patrons

## User Status - Blocked

If a patron's record is automatically blocked due to excessive fines (\$10.00 or above), the patron's name will appear in red when the patron record is retrieved. The patron will not be able to check out or renew items until the reasons for the block are resolved.

Block reasons 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.

A staff member may also create a manual block on a patrons account if necessary.

1. Retrieve the patron account.
2. Open the Messages tab.
3. Click the 'Apply Penalty / Message' button.
4. Select 'Block' as the Penalty Type.
5. Add a concise note explaining the block and how it can be removed.
6. Enter the staff name or initials in case there are any questions about the block.
7. Click OK.

## User Status - Barred

Barred is a status that should be reserved for serious offenses, such as theft of library materials. 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 (Messages > Apply Penalty / Message > Alert) or Note (Other > Notes > Add New Note) on the patron account [1999.10].

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.

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<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:barred>

Last update: **2018/10/19 13:27**

# 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 Patron Edit 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].

## Requesting an Account Merge

If you encounter two or more accounts that belong to the same patron, please submit a [Help Desk](#) ticket. We will need:

- Patron Barcodes (Indicate which one should be the "Lead" or primary barcode. If one of the accounts is in collections, then that account must be marked as the lead account.)
- Patron Name

Ideally, we would also appreciate:

- Patron Date of Birth
- Patron ID and/or Parent Information

If the account names or other identifying information do not match, please explain what criteria you used to identify them as the same patron. We will store this in the help desk in case for record-keeping purposes in case there are any questions in the future about why specific accounts were merged.

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Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:duplicates>

Last update: **2018/10/11 16:15**

# Lost / Stolen Cards

If a patron comes into the library and reports his or her PINES card lost or stolen, ask for ID to verify the name of the patron. Use the patron search function to search for and retrieve the patron record. Click Edit, then click the Replace Barcode button and assign a new card to the patron.

If a patron reports a card lost or stolen by telephone (or is otherwise not present), place a temporary Block on the account (Messages > Apply Penalty / Message > Block) until the patron is able to come into the library to pick up a new card. This will prevent anyone else who finds the card from using it.

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 PINES account access, consult with the patron as to whether the username should be updated to the new card number.

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

[https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:lost\\_cards](https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:lost_cards)

Last update: **2018/10/11 16:15**

# Alerts, Notes, and Messages

There are several ways you can attach messages to a patron's account. The preferred ways to add messages to an account are:

- Messages that should be visible to patrons: Other > Notes > Add New Note (Check "Patron Visible")
- Messages that should be visible to staff only, and appear when patron is retrieved: Messages > Apply Penalty / Message > Alert
- Messages that should be visible to staff only, but do *not* need to appear when patron is retrieved: Other > Notes > Add New Note (Do *not* check "Patron Visible")

## Alerts

Add or update an alert by editing the patron's account and typing your alert in the Alert Message fields. This is the least preferable method of adding alerts because there may only be one Alert Message at any time and there is no saved history of prior alerts. If duplicate accounts are merged, this type of alert may be lost.

The Alert Message will appear when you first pull up the patron's account and you can view it again while in the patron's account by clicking Other > Display Alert and Messages.

## Notes / Patron Message Center

To add a Note in a patron's account, retrieve the patron's account then click Other > Notes > Add New Note. A pop-up window will open where you can choose to make the note visible to the patron (or not), and enter a title for the note and the note itself. It is good practice to enter your initials (the date and library will be stored automatically). Multiple notes may be stored at once. Notes cannot be edited, but they may be deleted if they are no longer relevant.

If the patron logs into "My Account," he or she will see any Notes that are patron-visible in the Messages screen. Staff can see if patrons have read the messages left in the patron message center by going to Other > Message Center.

The system will also automatically leave notes in the Patron Message Center (see [Automated Notifications](#)) that staff can see by going to Other > Message Center.

## Messages

Messages may be used to add notes that can be edited, to apply penalties, and to block accounts.

Click the Messages button in the patron's account to view, add, and archive messages.

To add a new messages, click the “Apply Standing Penalty/Message” button. A pop-up window will open where you may choose to add a Note, an Alert, or a Block to an account. Type in a descriptive message and your initials, then click Apply.

- A “Note” will add a message to this list, but it will not be visible unless you go to this screen.
- An “Alert” will add a message to this list that will also display when you first open a patron's account or when you click Other > Display Alert and Messages. *(This is the best way to add an alert to a patron account because it can be archived for posterity.)*
- A “Block” will add a message to this list that will also display when you first open a patron's account or when you click Other > Display Alert and Messages. It will also prevent the patron from checking out items, placing holds, or renewing items.

The system will also add certain messages to this interface when different actions occur. For example, if staff clicks the “Invalid Address” button in a patron's account, the system will create a message here that says “Patron has an invalid address.”

After an issue has been resolved and the message is no longer relevant, click the Messages button, select the relevant message line item, click “Actions for these Penalties/Messages” and then choose either “Remove Penalty/Message” (which will delete it) or “Archive Penalty/Message” (which will inactivate it and move it to the Archived list at the bottom of the screen).

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<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:messages>

Last update: **2018/10/11 16:15**

# Grouping Patrons

If a new patron is cloned from another patron (eg, a child's card is cloned from a parent's card), they are automatically grouped together. You may also manually group different patrons together.



If you open the Group Member Details and no one (including the patron you are viewing) loads in the list, please refresh your browser window to get them to display.

## Viewing a Group

1. Open a patron's account.
2. Click Other > Group Member Details.
3. The list of people in the group will appear.

## Adding a Patron to a Group

1. Open one patron's account.
2. Click Other > Group Member Details.
3. Check the box next to the patron's name.
4. Click Actions.
5. Click Move Another Patron To This Group.
6. Enter the second patron's barcode number.
7. Click OK.

## Removing a Patron from a Group

1. Open the account of a patron who is in the group, but who is not the member you wish to remove.
2. Click Other > Group Member Details.
3. Check the box next to the patron you wish to remove.
4. Click Actions.
5. Click Remove Selected From Group.

## Group Fines

There are no PINES policies related to groups, but if members of a group have fines, the sum of all the fines will appear in the patron summary bar when any member of that group is opened.

Profile	Patron
Home Library	ARL-ATH
Net Access	Filtered
Date of Birth	1/1/1980
Last Activity	4/11/2017
Last Updated	3/17/2017
Create Date	1/30/2017
Expire Date	1/30/2019
Fines Owed	\$0.00
<b>Group Fines</b>	<b>\$0.09</b>
Items Out	0
Quantity	0

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Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:families>

Last update: **2021/04/29 14:26**

# User Buckets

User Buckets can be created to temporarily hold a group of patrons that need to be reviewed or updated. For example, you may wish to create a user bucket of potential duplicate patron accounts that you wish to review further, or a user bucket for a family that needs to have all of their addresses updated, or a user bucket for all new accounts that are created so that they can be double-checked for completeness later.

## Adding Patrons to User Buckets

Patrons can be added to a User Bucket from the Patron Search Screen or the Circulation Menu.

### Patron Search Screen

1. Perform a patron search.
2. Select the patron(s) to add to a bucket and click the Add To Bucket button.
3. Choose the bucket to add the patron to or create a new bucket.
4. A message will show at the bottom right of the screen that says, "X # of patrons have been added to bucket Y."
5. To view the bucket open the Circulation menu and choose User Buckets.
6. In the Bucket View tab click the Buckets button and choose the bucket to view.

### Circulation Menu

1. Open User Bucket from the Circulation menu.
2. In the Bucket View tab click the Buckets button and choose the bucket to add the patron(s) to or create a new bucket.
3. Leaving the bucket being used open in the Bucket View tab, click on the Pending Users tab.
4. Scan the patron barcode in the Barcode box. The patron will be added to the list below.
5. Highlight the patron and right click or use the Actions menu and select Add To Bucket.
6. Switch back to the Bucket View tab. You will see that the patron has been added to the open bucket.

## Actions

### Batch Edit All Users




### Update all users ✕

Name for edit set

Home Library ▾	Main Profile ▾	Internet Access Level ▾
Unset	Unset	Unset

Barred flag	Unchanged ▾
Active flag	Unchanged ▾
Juvenile flag	Unchanged ▾
Privilege Expiration Date	mm / dd / yyyy



Only staff with LibraryManager or LocalAdmin permissions can use the Batch Edit feature. Clicking on the Batch Edit All Users button allows you to update certain fields on all of the patrons in the current bucket at once. Give the update a name in the “Name for edit set” field and then you can update:

- Home Library
- Main Profile (Patron Permission Group)
- Internet Access Level
- Barred Flag
- Active Flag (PINES has scripts that run nightly to mark patrons active or inactive, so this will not typically be used by PINES staff)
- Juvenile Flag (PINES has scripts that run nightly to change juvenile accounts to adult accounts when they turn 18, so this will not typically be used by PINES staff)
- Privilege Expiration Date (Account expiration)

## View Batch Edits

This allows you to see the list of batch edits that have already been done on the current bucket.

## Roll Back Batch Edit

This allows you to select a previous batch edit that was done to the current bucket and undo it.

## Batch Modify Statistical Categories

For those libraries that use patron stat cats, this will allow all patrons in the current bucket to be updated at once.

## Individually Edit Selected Users

Select the patrons you wish to edit from the list and click on Actions > Individually Edit Selected Users. Each of the patron accounts you selected will open in a new tab.

## Remove Selected Users From Bucket

Select the patrons you wish to remove from the current bucket and click Actions > Remove Selected Users From Bucket. The patrons you selected will be removed from the bucket.

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<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:buckets>

Last update: **2019/03/19 10:16**

# Searching for Patron Accounts

The patron search function can be accessed by the staff client home page (Search For Patron By Name) or from the top menu (Search > Search for Patrons). If you only see a few name search fields when you go to the page, click the down arrow to the right of the search button to expand the section to see all available search fields. This option is “sticky,” meaning that it will save your preference on your workstation.

Most of the search fields are left-anchored. What this means for searching is that you can type in the first letters of a name and the search will retrieve name variants starting with those fields. For example, typing “kat” in the first name field will retrieve patrons with first names of Kat, Katherine, Kate, Katie, Katelyn, etc.

## Name Keyword Searching

The Name Keywords search field is new as of 2019.01. This field may be used to search across First Name, Last Name, Middle Name, Preferred Name, and Name Keyword fields. For example, using the name keyword field to search for 'Carol James' should retrieve anyone named Carol James, Caroline James-Smith, James Carrollton, etc.

## Filtering by Permission Group and Location

In most situations, such as searching to see if a new patron already has a library card or not, you will want to search across all of PINES and all Profile Groups (aka, permission groups), and have the Include Inactive? box checked. However, you can see subsets - for example, to easily retrieve a list of all staff members registered in your library system), change Profile Group to “Staff” and change PINES to your system.

## Searching by Date of Birth

If searching for a common name, it may be useful to filter your search results by birth date. If you know the exact birth date, you may enter it in the DOB Year, DOB Month (enter numerically, eg 9 for September), and DOB Day fields. If you know the year but not the month or day, just enter the year. If you are not sure of the year but think it is in a particular decade, you could enter 197 to filter to patrons born between 1970-1979.

## Searching by Identification

All Georgia driver's licenses should be entered in the format GA-123456789. Because of this, when searching by ID, type in your search in the same format. (Searching GA 123456789 will not retrieve GA-123456789 and vice versa.)

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<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:searching>

Last update: **2019/01/08 19:34**



# "My Account" Access

<https://gapines.org/login>

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

Patrons have the option to automatically store their own checkout history and access it through their My Account login. This option is turned off by default, but patrons may turn it on by logging into their accounts and selecting the appropriate option. Library staff cannot see the patron's checkout history through the staff client. [2015.12].

Access to the personal patron record is available only through the PINES library card number and password or personal identification number (PIN) for each user, as all library records are confidential in nature. The assigned PIN should be provided to the user at the time of library card registration, and staff will advise the patron to login to the OPAC and change their password to one of his or her choosing as soon as possible. The user may also use the My Account options to 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. Patrons may reset their passwords from the My Account page if they have a valid email address on file via 'Forgot your password?' functionality [2006.05]. Patrons may also request a password reset by phone by calling a PINES library. The patron must be able to provide the library staff person with the barcode number, full name, date of birth, and either address or phone number. Library staff should encourage patrons to log in to the OPAC and change the assigned password to a password of their own choosing as soon as possible for security and privacy purposes [2014.12].

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<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

[https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:my\\_account](https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:my_account)

Last update: **2018/10/11 16:15**

# Searching the Catalog

- [Advanced Search Tips \(Cheat Sheet\)](#)
  - [Advanced Search Tips \(Slideshow PDF\)](#)

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:circulation:search>

Last update: **2019/09/10 16:26**

# Circulating Items

- [Checking Out Items](#)
- [Renewing Items](#)
- [Checking In Items](#)

## General Policies

### Circulation Matrix

- See: [Circulation Matrix \(Recurring Fine Amounts, Loan Durations, and Renewal Counts\)](#)

### Circulation and Hold Data Retention

With a few exceptions, circulation and hold data that has been resolved/closed is archived by the system after one year. Archiving this data does not affect statistical reporting, such as total number of circulations per item, circulation staff, circulation workstation, and circulating library.

Circulation data with outstanding fines or fees, including Lost and Long Overdue, is retained. Circulation information is also retained for those patrons that opt to have the system store their circulation history.

However, when looking at the “Show Last Few Circulations” item screen or the “Show Cancelled Holds” patron screen, data older than a year is not be displayed.

### Default Item Price

Items that have never had a price assigned use \$25.01 as the default item price [2007.12]. That is, if the price in the database is NULL, \$25.01 is used when assigning Lost, Long Overdue, and Damaged charges. If the price in the database is 0 or blank, then no item price will be automatically used when assigning Lost, Long Overdue, and Damaged charges, and staff will need to add the price to the bill manually.

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Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:circulation:circ>

Last update: **2018/10/11 16:15**

# Checking Out Items

## Basic Checkout Procedure

A normal checkout session would proceed as follows:

1. Staff member opens the Check Out screen (Circulation > Check Out).
2. Patron presents his/her library card (see: [Library Card Required for Circulation](#)).
3. Staff member scans card to retrieve account.
4. Staff member determines if patron is in good standing (i.e., not blocked, barred, inactive, exceeding fine limits).
5. Staff member scans barcodes of items presented for checkout.
6. Staff member clicks the “Done” button to prompt printing of checkout receipt.
7. Staff member should verbally inform patron of due dates. (It is good practice to also inform patron of due dates on any items already checked out on the account and to inform the patron of any fines owed.)

## Circulation Limits

In most cases, a maximum of 50 items may be charged simultaneously on a PINES card [1999.05], [2002.12]. Some types of accounts, such as Restricted, and lower limits. See [User Permission Groups](#) for more information on different patron account types.

Materials circulate for varying periods of time; see the [PINES Circulation Matrix](#) for details on circulation rules.

Audio-visual materials (DVDs, games, etc.) are limited to 15 per patron at any given time [2013.05]. This policy supersedes any local limits that previously been used.

## 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. (See: [Lost / Stolen Cards](#)) 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.

## Checking Out Non-Cataloged Items

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.

1. Retrieve the patron account as you would for a normal checkout.
2. Click on Barcode to pull down a list of non-cataloged item types.
3. Select the appropriate type of non-cataloged item.
4. Enter the number of items.
5. Click Submit.

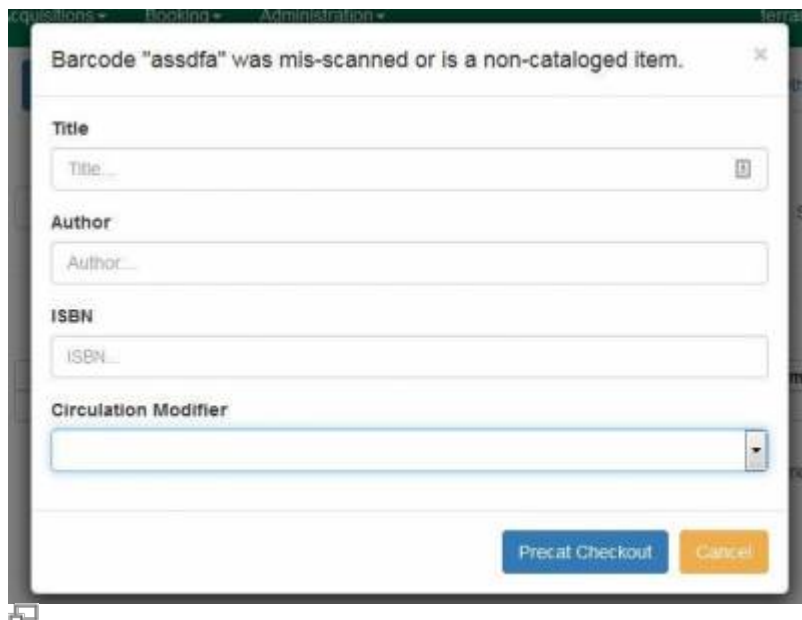


The screenshot shows a web interface for checking out non-cataloged items. At the top, there is a dropdown menu labeled "Barcode" with a downward arrow, followed by the number "3" in a text input field, and a "Submit" button. Below the dropdown, a list of item types is displayed: "Barcode", "Adult Paperback" (which is circled in red), "Computer", and "Equipment". To the right of this list, there is a table with three columns: "Balance Owed", "Barcode", and "Bill #".

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 and then will be automatically removed from the patron's account. Non-cataloged item types may be configured separately for each library system by the designated LocalAdmin.

## Pre-Cats

With the exception of items that are intentionally non-cataloged (see above), 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:



When this message appears when scanning a barcoded item, staff should first attempt to re-scan the item. Many pre-cats are created from mis-scans, which causes problems with tracking and cleanup.

When it is determined that the item's barcode is not in the database, fill out the form.

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].

- [Complete Step-by-Step Instructions for Handling Pre-Cats](#)

## Cataloged Items Without Barcodes

If a cataloged item has lost its barcode, staff should apply a new barcode to it before checking it out.

1. Identify the old barcode number by searching the catalog.
2. In Evergreen click Circulation > Replace Barcode.
3. Enter the original barcode and the new barcode.
4. Click Submit.
5. Return to the patron account and check out as normal.

## Replace Item Barcode

Enter Original Barcode for Item

Enter New Barcode for Item



From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:circulation:checkout>

Last update: **2021/02/03 11:00**

# Renewing Items

Most items can be renewed twice (see the [PINES Circulation Matrix](#) for exceptions). After items have been renewed the maximum number of times, they must be returned and made available for all library patrons. 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 also renew their checked out items via the My Account feature of the OPAC. When an item is in hand, no library card is required in order to renew the item.

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Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:circulation:renew>

Last update: **2018/10/11 16:15**

# Checking In Items

## Basic Check-In Procedure

1. Open the Checkin Items page (Circulation > Check In).
2. Scan each item's barcode.



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.

## Back-dating Checkins

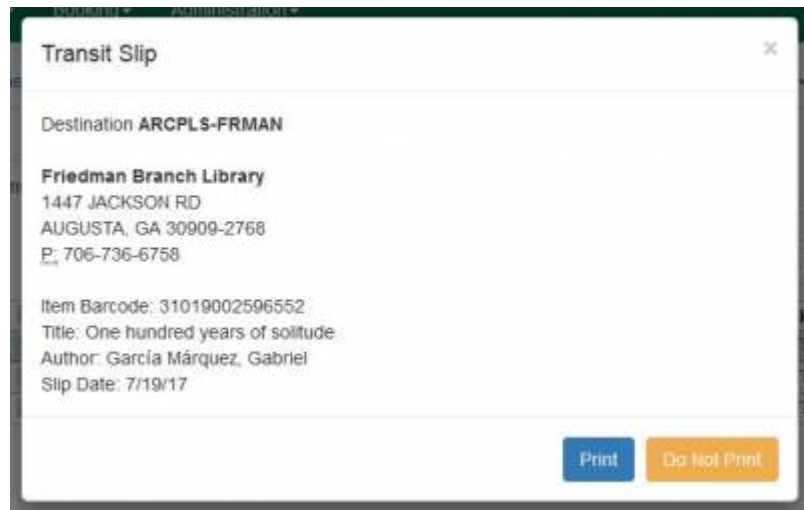
Staff may change the date for the check-in by altering the Effective Date field for purposes of checking in items from the bookdrop first thing in the morning using a previous day's date, or in other circumstances in which the check-in date needs to be changed. Set the desired check-in date, and check in items normally. Reset the effective date to the current day once back-dated checkins are complete.

The screenshot shows a user interface for a library system. At the top, there is a green header bar with the text "terran @ STATELIB-L-terran-office" and "English (US)". Below this is a light blue bar. The main content area features a form with a field labeled "Effective Date" containing the date "07/19/2017". This field is circled in red. Below the form is a navigation bar with buttons for "Actions", "Rows 25", and "Page 1". At the bottom, there is a table with columns labeled "Route To", "Start", and "Title".

## Checking In Items That Need To Go To Another Library

If the item that is checked in needs to go to be routed to another library (either to fulfill a hold request at

another library or to return to its owning library), check it in as normal. The system will automatically change its status to “In Transit” and a pop-up message will appear that will allow you to print a Transit Slip that should be included with the item when sent to its destination.



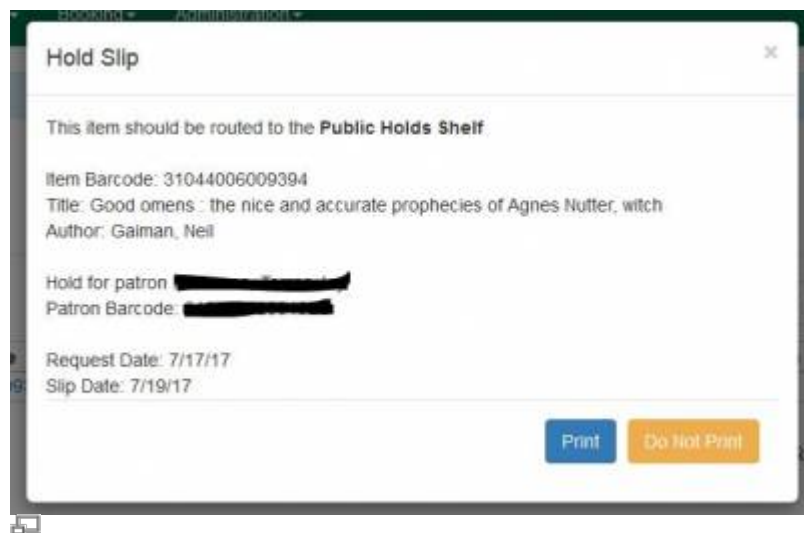
The screenshot shows a window titled "Transit Slip" with a close button (X) in the top right corner. The content includes:

- Destination: **ARCPLS-FRMAN**
- Friedman Branch Library**  
1447 JACKSON RD  
AUGUSTA, GA 30909-2768  
P: 706-736-6758
- Item Barcode: 31019002596552  
Title: One hundred years of solitude  
Author: García Márquez, Gabriel  
Slip Date: 7/19/17

At the bottom right, there are two buttons: "Print" (blue) and "Do Not Print" (orange).

## Checking In Items That Will Fill Hold Requests

If the item being checked in is needed to fill a hold request at your library, check it in as normal. A pop-up will appear that will prompt you to print a hold slip that should be attached to the item.



The screenshot shows a window titled "Hold Slip" with a close button (X) in the top right corner. The content includes:

- This item should be routed to the **Public Holds Shelf**
- Item Barcode: 31044006009394  
Title: Good omens : the nice and accurate prophecies of Agnes Nutter, witch  
Author: Gaiman, Neil
- Hold for patron [REDACTED]  
Patron Barcode: [REDACTED]
- Request Date: 7/17/17  
Slip Date: 7/19/17

At the bottom right, there are two buttons: "Print" (blue) and "Do Not Print" (orange).

The item's status is automatically changed to “On holds shelf” and automated notices to the patron are triggered (see: [Automated Notifications](#)). If the patron has opted to be notified by telephone, the telephone number will appear on the hold slip so that staff may call.

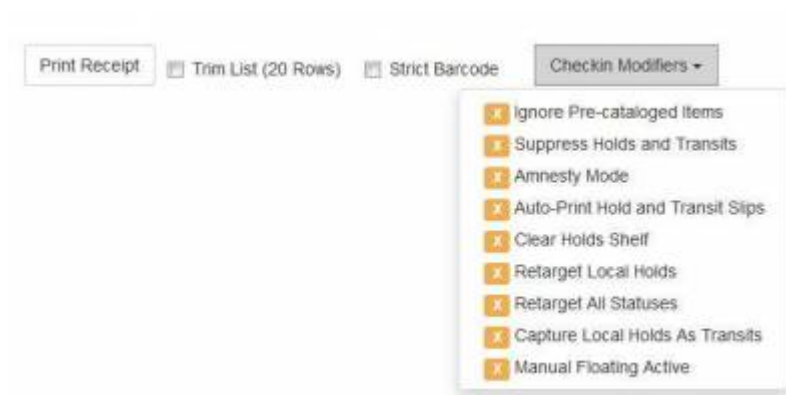
## Checking in Pre-Cats

When pre-cataloged items (see: [Pre-Cats](#)) are checked in, the item status is automatically changed to

Cataloging and an alert message appears. Route the item to the cataloging department for full entry into the database.

## Checkin Modifiers

Evergreen includes various options for altering how items are checked in for special circumstances (for example, during amnesty periods). These options are selected through the Checkin Modifiers button on the Checkin Items page.



- **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. *Not normally used.*
- **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 normally used.*
- **Amnesty Mode/Forgive Fines:** See below.
- **Auto-Print Hold and Transit Slips:** This should be checked for most users in most situations.
- **Clear Holds Shelf:** When checked, a “Clear Holds Shelf” message will appear at the top of the screen. This checkin modifier is used when removing items from the holds shelf that have not been picked up by patrons. It will clear the item's “On hold shelf” status and allow it to be routed to its next destination.

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

## Amnesty Mode

On certain occasions, a library may set an 'amnesty' period to forgive overdue fines on books returned during a specified time period. In order to save time manually forgiving these fines, you may use the Amnesty Mode option during the checkin process.

1. In the Evergreen Staff Client, click Circulation > Check In Items.
2. On the bottom-right corner of the screen, click Checkin Modifiers > Amnesty Mode.

3. Check books in (you will see messages indicating if overdue fines have been removed from the items).
4. Remember to uncheck Checkin Modifiers > Amnesty Mode when you wish to return to normal checkin.

When you check in items in while Amnesty Mode is turned on, the fines are voided (not forgiven) so they will no longer show up on the patron accounts. If you need to find out how many fines were voided during this time period, you will need to run a report. (There is a PINES Quick Report you can run to review voided fines - please submit a Help Desk ticket if you require assistance.)

### Amnesty Mode & Lost / Long Overdue Items

Checking items in with Amnesty Mode will only clear overdue fines and will not clear 'Lost' or 'Long Overdue' charges. When you scan in a lost or long overdue item, an alert will pop up to inform you of its status. If the item belongs to your library, you may opt to go into the patron's account to manually forgive the remainder of the lost or long overdue charges.

If the item belongs to a different library, the fines should not be forgiven (only an item's owning library should forgive lost or long overdue fines).

## Other Checkin Options

- **Print Receipt:** Prints a receipt of the items listed on screen that have been checked in. (Use this option if a patron requests a receipt of the items they have returned.)
- **Trim List:** This option limits the list of items on screen to 20 rows, regardless of how many barcodes are input. *Not normally used.*
- **Strict Barcode:** If checked, the barcode field will only accept 13-digit Codabar barcodes. Barcodes in any format, even if legitimate, will not be processed.

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# Item Statuses and Actions

For complete list of possible statuses, see: [Cataloging Manual: Item Statuses](#)

## Available

The item is on the shelf and available for check out.

## Checked Out

The item is checked out to a patron. This status does not indicate whether or not the item is overdue.

## Claims Returned Items

Claims Returned is used 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.

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 by the owning library if it is not found after 45 days [1999.10].

- [More Information about Claims Returned](#)

## Damaged Items

### Damaged Items Policy

When an item is marked Damaged, it is hidden from the public catalog and will not be targeted for holds. The Damaged item status may be used for items that are damaged beyond repair and will need to be discarded, or for items that will be returned to the collection after repairs. The Damaged item status may be used regardless of whether or not a patron will be billed for damages.

Only the library that owns an item should assess whether or not a patron should be billed for damages to that item or not. The owning library may choose to bill the entire cost of the item plus a processing fee if an item is damaged by the patron beyond repair, or may choose to bill a partial amount (for example, when there is repairable damage such as a minimally torn cover), or may choose to mark the item damaged without billing the patron for it (for example, when there is damage caused by normal wear and tear).

Libraries may choose to assess a processing fee of up to \$10 per item for item damage on their own items (this is set in the Library Settings Editor). If the damage is assessed after the item has been checked in, a damaged bill may be added to the patron account manually.

Marking an item Damaged will *not* void overdue charges. If the patron is being billed the full price of an item, the library may choose to manually void overdues.

See [Payment Retention and Reimbursal](#) regarding payments on Damaged items that are accepted by a non-owning library.

## Damaged Items Instructions

1. To mark an item Damaged, open it in the Item Status/Details screen.
2. Click the Actions button.
3. Select Mark > Item as Damaged.
4. You will be alerted that the item will be marked Damaged. Click Submit.
5. If the item is currently checked out or contains information about the last patron that had it checked out, a second popup will appear prompting you to choose whether to bill the patron for the item or not. Your options will be to bill the full amount plus processing fee (this is the amount that appears by default), to bill a different amount (simply type in a different amount), or not to charge (click on the No Charge option).
6. Enter a note describing the type of damage.
7. Once you have made your selection, click Submit.

Mark Item(s) Damaged

Item CONC51000657 will be marked damaged. Was returned on 12/20/17 14:32 pm for Sanford, Elizabeth Vanessa : sam. Confirmation required to charge this patron \$6.99 for the damage.

Fee: 6.99

Type: Damaged Materials

Note: Water damage by patron

Charge Fees No Charge Submit



If the damaged item belongs to another library, you may mark it damaged with No Charge so that it will return to its owning library and cannot be captured by a hold. If you do so, be sure to include a note with the physical item explaining that you have marked it damaged but have not charged for it so that it will be routed to the appropriate department at the owning library. The owning library may then go through the steps to mark it damaged a second time, and choose the fee they wish to apply.

Libraries should never use tape to attach notes to directly books [2019.09].

## Discard/Weed

Beginning January 2019, Circulation staff may now change items to a Discard/Weed status in order to streamline the weeding process. Marking an item Discard/Weed immediately hides it from the public catalog and it will not be able to be targeted for holds. Depending on local workflow, the items marked for Discard/Weed can either be placed into a bucket for review by cataloging staff, or cataloging staff may wish to run reports to obtain lists of items marked Discard/Weed.

- More information is available at: [Marking Items Discard/Weed](#)

## In Process

Items in this status have been cataloged and are awaiting check in at the circulation library, which makes item active. Items in process can be placed on hold. If patron has placed a hold on the item, checking in triggers notification that item is needed to fill a hold. Otherwise, after check in item is now in Available status.

## In Transit

The item is being shipped from one library location to another. This status is automatically assigned by the system. When an item arrives at its destination, a library staff member checks it in, which removes it from the In Transit status. If an item is in the In Transit status but does not arrive and cannot be located at either the sending or receiving library, the status can be manually changed to Missing.

See also: [Items in Transit](#)

## Long Overdue Items

Items that are overdue for longer than 180 days are automatically changed to a status of LONG OVERDUE (unless the patron has been flagged for collections). The price of the item, plus an optional processing fee of up to \$10 (set per library in the Library Settings Editor), is applied to the patron's card.

Overdue fines on the item are automatically voided.

See [Payment Retention and Reimbursal](#) regarding payments on Long Overdue Items that are accepted by a non-owning library.

If the patron finds the item and returns it within 6 months (180 days) of payment, the system will void the item price and re-apply the overdue fines that had been previously voided. The system will not void processing fees.

If the patron has not paid for the item, but finds and returns it within 6 months (180 days), the system will void the item price and re-apply the overdue fines that had been previously voided. The system will not void processing fees.

Historical Note: The PINES Executive Committee agreed upon a Long Overdue policy in May of 2006 [2006.05], but the system was not capable of automating it at the time. Implementation of this feature occurred October 2014 and eligible items for the previous three years were marked Long Overdue.

## Long Overdue Items Report

*Shared Folders > Templates > ddale > Helpdesk Request > Collection Maintenance > Lost or Long Overdue and Paid Item List*

## Payment for Long Overdue Items

If a Long Overdue item is paid for at a different library than the owning library, the payment amount may be kept by the payment library unless the owning library sends an invoice for reimbursal within 90 days.

See Also:

- Staff Workflows for Long Overdue Processing
  - How Long Overdue Processing Works

## 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 in the Library Settings Editor), 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.

See [Payment Retention and Reimbursal](#) regarding payments on Lost Items that are accepted by a non-owning library.

If an item has been marked lost that has not been paid for is returned within 180 days, Evergreen will automatically void the item's cost and reinstate any overdue fines that had previously been voided when the item was marked lost. The system will not void processing fees.

## Refunds on Lost and Long Overdue Items

If an item has been marked Lost or Long Overdue that has not been paid for is returned after 180 days, Evergreen will not void the item's cost.

Evergreen will not void processing fees. If a library chooses to forgive a processing fee for one of their own items, staff must do it manually. Libraries must not forgive or void processing fees on items owned by other libraries.

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.

"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. When appropriate, 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].

## Missing

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 to try to locate them, and then delete them as they see fit.

## On Holds Shelf

The item has been placed on a library's Holds Shelf and is ready for pick up by the patron it is on hold for at the patron's desired pickup location.

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# Items in Transit

When an item is routed from a library location to another, it is placed automatically in “Transit” status. When the item arrives at its destination, it should be checked in. If the item is returned and does not have any holds on it, it will switch to “Reshelving” status. After one day (24 hours), it will automatically switch to “Available” status. If the item is on hold for someone, the system will print a hold slip.

If the item arrives at its destination but is not checked in properly, it will remain in Transit status even though it might be reshelved. To anyone viewing the catalog, it will look like the item is not available and it will delay holds on the title.

It is recommended that each library check their transit lists on a regular basis (monthly or weekly) to catch any items that have been routed to their location, but not checked in.

## Evergreen's Transit List Interface

1. In the Evergreen Staff Client, click on Administration > Local Administration > Transit List.
2. Select whether you want to view Transits to or Transits From a particular library.
3. Select a date range. The screen will refresh with a list below.

### To search for items that have been in transit for a long time:

1. Use the column picker to add the Call Number Label column and then click the column header to sort by call number.
  - You may wish to display more rows at once.
  - You may wish to remove some columns
  - Use the browsers File > Print functionality to print the list. (You may be able to get the information you need using the Print Transits button, but that is still under review as of 2.12.)
2. Check the library for each item.
  - If you find an item, scan it into the Checkin screen to update its status.
  - If you are unable to find an item, mark it Missing.

## Transit Quick Reports

You may also retrieve this information through reports if you wish.

- Quick Reports > Quick Report Templates > Items > Transits: My Library's Items In Transit
- Quick Reports > Quick Report Templates > Items > Transits: Sent from My Library
- Quick Reports > Quick Report Templates > Items > Transits: Sent to My Library

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<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:circulation:transits>

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# PINES Circulation Matrix

## Fine Levels

Every item has an attribute called “Fine Level” that determines the level of recurring fine with which the item circulates, within a pre-determined range of levels. By default, copies are set to “normal”. If a copy has been manually altered in the copy editor to “high” or “low”, the fine level will change according to the table below. For example, if a given item circulates at \$.20/day (based on the circ modifier, MARC, etc.) and the item flag is changed to have a “high” fine\_level, then it will circulate at \$.50 / day.

The low/normal/high fine level options are not enabled for all item types.

## Duration Rules

Every item also has a “Loan Duration” attribute, which affects the length of time an item circulates with the options of “short”, “normal” (the default setting), and “extended”.

Loan duration options are not enabled for all item types.

## Circulation Matrix

- Use of circulation modifiers for specific item types should be in compliance with PINES policies.
- When an item has a circulation modifier, that modifier takes precedence over the MARC item type when determining circulation rules.
- PINES libraries should no longer use MARC item Type for circulation rules. All new items should be assigned an appropriate circulation modifier.

\* [Click here for Circulation Modifier list and definitions.](#)

Circ Modifier	Recurring Fine (Normal)	Recurring Fine (Low)	Recurring Fine (High)	Short Duration	Normal Duration	Extended Duration	Renewal Count
<a href="#">art</a>	.20				3 months		1
<a href="#">audiobook</a>	.20				14 days		2
<a href="#">av</a>	.50				7 days		2
<a href="#">bestseller</a>	.50	.20	.50		7 days		2
<a href="#">book</a>	.20				14 days		2
<a href="#">book-ff</a>	no fines				14 days		2
<a href="#">cd</a>	.20				14 days		2
<a href="#">dvd-0</a>	.50	.20			7 days	14 days	0
<a href="#">dvd-2</a>	.50	.20			7 days	14 days	2



Circ Modifier	Recurring Fine (Normal)	Recurring Fine (Low)	Recurring Fine (High)	Short Duration	Normal Duration	Extended Duration	Renewal Count
e-book	.50				3 days		1
e-device	10.00	5.00	50.00	1 day	7 days	14 days	0
equipment	10.00	5.00	50.00	1 day	3 days	7 days	0
equipment-local	10.00	5.00	50.00	1 day	3 days	7 days	0
high-demand	\$1.00			7 days			0
ILL item	.20			14 days			0
kit	.20	5.00	50.00		14 days		2
localpass	3.00	1.00	5.00	3 days	7 days	14 days	1
magazine	.20				14 days		2
map	.50				3 days		1
microform	.20				14 days		2
music	.20				14 days		2
realia-0	10.00	3.00	25.00	3 days	7 days	14 days	0
realia-1	10.00	3.00	25.00	3 days	7 days	14 days	1
realia-2	10.00	3.00	25.00	3 days	7 days	14 days	2
record	.20				14 days		2
software	1.00	.20	5.00	3 days	7 days	14 days	2
statepass	3.00				7 days		1
talking-book	0				unlimited		0
toy	.20				14 days		2
video	.50				7 days		0
video-mid	.50				7 days		2
video-long	.20				14 days		2
videogame	1.00	.20	5.00	3 days	7 days	14 days	2

## Circulation Matrix: MARC Types

MARC Item Type	Recurring Fine	Recurring Fine (Low)	Recurring Fine (High)	Short Duration	Normal Duration	Long Duration	Renewal Count
a - Language Material	.20				14 days		2
c- Notated Music	.20				14 days		2
d - Manuscript Notated Music	.20				14 days		2
e - Cartographic Material	.50				7 days		2
f - Manuscript Cartographic Material	.50				3 days		1
g - Projected Medium	.50				7 days		0
i - Nonmusical Sound Recording	.20				14 days		2

MARC Item Type	Recurring Fine	Recurring Fine (Low)	Recurring Fine (High)	Short Duration	Normal Duration	Long Duration	Renewal Count
j - Musical Sound Recording	.20				14 days		2
k - Two-dimensional Nonprojectable Graphic	.20				3 months		0
m - Computer File	.20				14 days		2
o - Kit	.20				14 days		2
p - Mixed Materials	.20				14 days		2
r - Three-dimensional artifact or naturally occurring object	.20				14 days		2
t - Manuscript Language Material	.20				14 days		2

## Circulation Exceptions

Item Circ System	Circ Mod, Etc.	Recurring Fine	Short Duration	Normal Duration	Long Duration	Renewal Count
STATELIB	book	no fines	35 days	35 days	35 days	1



STATELIB-L A/V items are holdable by any patron in PINES.

## Age Protection

See: [Age Protection](#)

## Holds

Only items with the 'book' or 'book-ff' circulation modifiers are holdable throughout the consortium. Items with all other circulation modifiers are holdable only within their own systems. See [definitions of circulation modifiers for more details](#).

## Hold Types or Levels

There are five levels or types of holds that can be placed in Evergreen. Library staff can place holds at all levels. Patrons can only place title or part level holds.

## **Title level holds (T)**

Designated by a T, title holds are placed on a single title/bibliographic record and can be filled by any copy in a holdable state on that record. Patrons and library staff can place title level from either the staff catalog or patron OPAC.

## **Part level holds (P)**

Designated by a P, part level holds are placed when a specific volume or part of a multi-part print work is needed. Parts are chosen at the time the hold is placed from a dropdown menu and apply to any volume or call number from any library with the same part label attached to the title record. Part level holds can be placed by either patron or library staff from either the staff catalog or patron OPAC. PINES has only implemented part level holds for print materials.

## **Item/Copy level holds (C)**

Designated by a C, Item/copy level holds are placed on a specific item on a bibliographic record and can only be filled by that specific item. Item/Copy holds should only be used by catalogers when they need to resolve a cataloging problem. Item level holds placed for patrons can negatively impact hold fulfillment and should not be used for patron holds. Item level holds can only be placed by library staff from the staff catalog.

## **Call Number/Volume level holds (V)**

Designated by a V, call number/volume level holds are used when any item attached to a specific library's call number or volume is needed. Call number/volume level holds should be rare since there are few occasions where a title or part level hold would not be a better option. Call number/volume level holds may also negatively impact hold fulfillment since the targetter will not look beyond that specific call number. Volume level holds can only be placed by library staff within the staff catalog.

## **Metaholds (M)**

Designated by an M, metaholds are used when a patron will accept the first available copy of any format of a title, or any language available for a title. Placing a metahold groups titles together for hold availability using a machine-based algorithm that identifies like titles. Holds are not placed on all records in the group; but, will be fulfilled with the first available copy on one of the grouped records. At hold placement, patrons or staff can choose format and/or language under advanced options. Metaholds can be for all formats for the grouped records, only book formats (regular or large print) or editions, only sound recording formats, or only visual material formats. Metaholds can be placed by patron or library staff from either the staff catalog or patron OPAC.

## Max Fine Levels

See [Max Fines vs. Max Bills](#) for an explanation of the difference between maximum fines and maximum bills.

### Systems using the max-fine level of \$10.00

- Augusta-Richmond County Library System (ARCPLS)
- Athens Regional Library System (ARL)
- Cherokee Regional Library (CHRL)
- Coastal Plain Regional Library System (CPRL)
- Dougherty County Public Library (DCPL)
- Flint River Regional Library (FRRLS)
- Henry County Library System (HCLS)
- Houston County Public Libraries (HOU)
- Marshes of Glynn Libraries (MOGL)
- Newton County Library System (NCLS)
- Oconee Regional Library (OCRL)
- Ochoopee Regional Library (OHOOP)
- Okefenokee Regional Library System (OKRL)
- Pine Mountain Regional Library System (PMRLS)
- Screven-Jenkins Regional Library (SJRLS)
- Statesboro Regional Public Libraries (STRL)
- Three Rivers Regional Library System (TRRLS)

**All other systems use the \$5.00 max-fine level**

## Library Processing fees

For processing fees at individual libraries, see [Library Processing Fees](#)

## Special User Groups

Users in the following groups (or sub-groups) accrue no late fines on circulations:

- Staff
- Trustee
- Institution
- GLS
- Homebound
- PLAY Card

See [User Permission Groups](#) for more information.

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# PINES Circulation Modifier List

art	magazine
audiobook	map
av	microform
bestseller	music
book	realia-0
book-ff	realia-1
cd	realia-2
dvd-0	record
dvd-2	software
e-book	statepass
e-device	talking-book
equipment	toy
equipment-local	video
high-demand	video-mid
ILL item	video-long
kit	videogame
localpass	

## PINES Circulation Modifier Definitions

See [PINES Circulation Matrix for circulation rules](#)

Circulation Modifier	Description	MARC Type Correlation (if applicable)
art	Circulating artwork such as prints, paintings or statuary. Not holdable outside owning library system.	k: Two-dimensional nonprojectable graphic; r: Three-dimensional artifact or naturally occurring object.
audiobook	Nonmusical sound recordings. Can be audiocassettes, compact discs, MP3 players or other nonprint, physical, media designed to be played back on an audio device. A 007 field should be included in the MARC record to define specific type. Not holdable outside owning library system.	i: Nonmusical sound recording.
av	Reserved for categories of audio-visual media not defined in other modifiers. This modifier will typically be older media such as filmstrips. Do not use if another modifier is more appropriate. Not holdable outside owning library system.	g: Projected medium; i: Nonmusical sound recording; j: Musical sound recording.
bestseller	High demand book. Modifier should be changed to book when demand lessens, or after owned by library for specific period of time. Items with this modifier can be nonholdable for owning library. Not holdable outside owning library system.	a: Language material; t: Manuscript language material.

Circulation Modifier	Description	MARC Type Correlation (if applicable)
book	Physical print monographs and serials, except for print magazines or journals. Can include atlases, pamphlets, or technical reports as well as books. Holdable outside owning library system; age protection rules can apply.	a: Language material; t: Manuscript language material.
book-ff	Physical print monographs and serials, except for print magazines or journals. Can include atlases, pamphlets, or technical reports as well as books. <b><i>Does not accrue fines.</i></b> Holdable outside owning library system; age protection rules can apply.	a: Language material; t: Manuscript language material.
cd	Musical or non-musical sound recordings or software on compact disc. A 007 field should be included in the MARC record to define media format. Not holdable outside owning library system.	i: Nonmusical sound recording; j: Musical sound recording; m: Computer file.
dvd-0	Projected media on DVD (Digital Versatile Disc or Digital Video Disc). A 007 field should be included in the MARC record to define media format. Items with this circulation modifier are not renewable. Not holdable outside owning library system.	g: Projected medium.
dvd-2	Projected media on DVD (Digital Versatile Disc or Digital Video Disc). A 007 field should be included in the MARC record to define media format. Items with this circulation modifier are renewable twice. Not holdable outside owning library system.	g: Projected medium.
e-book	A print or sound recording available only through digital download from an online source. Not holdable outside owning library system.	Type depends on content.
e-device	Any device used to read or playback downloadable media, whether print, sound or visual. Not holdable outside owning library.	r : Three-dimensional artifact or naturally occurring object.
equipment	Physical resources such as projectors, cameras, magnifying glasses, screens, etc. made available for circulation. Does not include e-readers or other devices more properly categorized elsewhere. Not holdable outside owning library system.	r: Three-dimensional artifact or naturally occurring object.
equipment-local	Physical resources such as projectors, cameras, magnifying glasses, screens, etc. made available for circulation. May include e-readers or other devices more properly categorized elsewhere if holds need to be restricted to the branch library. Not holdable outside owning library (branch only holds).	r: Three-dimensional artifact or naturally occurring object.

Circulation Modifier	Description	MARC Type Correlation (if applicable)
high-demand	Items with this modifier can be any media, format, or audience. Used to support a program where patrons can check out high demand items if they are on the collection shelf when the patron is in the library. Voluntary use; libraries can name program/collection as they wish; some libraries call their collection Lucky Day. Items with this circulation modifier have a circulation period of 7 days; \$1.00/day fine, OPAC invisible and should be set as nonholdable (if library uses separate shelving/copy location, it should be set up as not holdable and OPAC invisible. Otherwise, items with the circ modifier should have attributes set to not holdable and OPAC invisible).	Type depends on content.
ILL item	This circulation modifier is used <b>ONLY</b> for items borrowed through OCLC ILL and have records created as Precataloged items. They can be any media, format, or audience. Items with this circulation modifier have a circulation period of 14 days; .20/day fine, OPAC invisible, and no renewals. See <a href="#">Processing Interlibrary Loan Items in PINES: Best Practices</a> for more information	Type is not applicable.
kit	Mixed-formats or multiple components that circulate as a unit under one barcode. May not be considered a kit for cataloging purposes (record may not use Type o since a component might be considered primary). Not holdable outside owning library system.	Type depends on content.
localpass	A ticket or other physical pass to a local venue or attraction. Generally cataloged as Type k - two-dimensional nonprojectable graphic. Not holdable outside owning library system; may not be holdable depending on partnership program requirements.	k: Two-dimensional nonprojectable graphic.
magazine	Individual or bound issues of a periodical. Not holdable outside owning library system.	a: Language material.
map	Physical map and other cartographic material, not including atlases. (Use circ modifier book for atlas). Not holdable outside owning library system.	e: Cartographic material; f: Manuscript cartographic material.
microform	Forms containing micro-reproductions. Includes microfilm reels and microfiche cards. These can be cataloged as monographs, serials or other bibliographic Types. Not holdable outside owning library system.	Type depends on content.
music	Either print music scores or music sound recordings in any format. Not holdable outside owning library system.	j: Musical sound recording; d: Manuscript notated music.
realia-0	Any three-dimensional artifact or naturally occurring object not appropriate for other circulation modifiers. Maybe games, toys, musical instruments, etc. Not holdable outside owning library system. No renewals.	r: Three-dimensional artifact or naturally occurring object.



<b>Circulation Modifier</b>	<b>Description</b>	<b>MARC Type Correlation (if applicable)</b>
realia-1	Any three-dimensional artifact or naturally occurring object not appropriate for other circulation modifiers. Maybe games, toys, musical instruments, etc. Not holdable outside owning library system. One renewal.	r: Three-dimensional artifact or naturally occurring object.
realia-2	Any three-dimensional artifact or naturally occurring object not appropriate for other circulation modifiers. Maybe games, toys, musical instruments, etc. Not holdable outside owning library system. Two renewals.	r: Three-dimensional artifact or naturally occurring object.
record	Music sound recording in vinyl record format. Not holdable outside owning library system.	j: Musical sound recording.
software	Programs used to control the functioning and operation of a computer or other device. Can be any format. Not holdable outside owning library system.	m: Computer file.
statepass	Any physical pass or ticket issued for a venue or attraction that is a part of a state-wide promotion. Maybe be governed by contractual obligations requiring specific circulation rules. May be a serial or a kit. Not holdable unless allowed by partnership agreement.	k: Two-dimensional nonprojectable graphic.
talking-book	Audio recordings specifically formatted for use of the visually impaired.	i: Nonmusical sound recording.
toy	Realia toys, games or other three-dimensional object for play or instruction using play. Not holdable outside owning library system.	r: Three-dimensional artifact or naturally occurring object.
video	Visual material in videocassette format. Circulation rules are .20/day, 14 days duration with 2 renewals. Not holdable outside owning library system.	g: Projected medium.
video-mid	Visual material in videocassette format. Circulation rules are .50/day, 7 days duration with 2 renewals. Not holdable outside owning library system.	g: Projected medium.
video-long	Visual material in videocassette format. Circulation rules are .20/day, 14 days duration with 2 renewals. Not holdable outside owning library system.	g: Projected medium.
videogame	An electronic or computerized game played by manipulating images on a video display or television screen. Not holdable outside owning library system.	m: Computer file

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[https://pines.georgialibraries.org/dokuwiki/doku.php?id=cat:circulation\\_modifiers](https://pines.georgialibraries.org/dokuwiki/doku.php?id=cat:circulation_modifiers)

Last update: **2021/04/01 10:02**

# Recommended Collection Maintenance Reports

The following reports assist libraries with maintaining the accuracy of their local collection data.

## Claims Returned

Libraries may mark Claims Returned items Lost after 45 days from the due date. For assistance identifying these items, use:

*Quick Reports > Quick Report Templates > Items > List of Items Marked Claims Returned*

See also: [Claims Returned Items](#)

## Holds

### Expired Holds:

To identify expired holds that are currently on your holds shelf, see: [Clear Holds Shelf](#)

## Inventory

See: [Inventory Process](#)

## Item Status Report

Get lists of items of a particular status (Missing, In Process, etc.) in order to do shelf checks.

*Quick Reports > Quick Report Templates > Items > List of Items by Status*

## Long Overdue Items

See: [Long Overdues](#)

## Pre-Cats

Pre-cat (pre-cataloged item) records are temporary records used for Interlibrary Loan or to allow

checkouts of items that have barcodes but no record in the catalog. Pre-cat records should be used for temporary purposes only and should be corrected (or deleted, in the case of ILL) when the item is returned to the library.

*Quick Reports > Quick Reports Templates > Items > Pre-Cat List*

See also: [Instructions for managing Pre-Cats](#)

## Transit Reports

You can retrieve transit reports through a built-in staff client function or through a report, depending on your needs.

See: [Clear Items In Transit](#)

## Weeding Report

*Quick Reports > Quick Report Templates > Items > Basic Weeding List*

See also: [Weeding and Inventory Slideshow](#)

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<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:circulation:maintenance-reports>

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# Offline Circulation

There are times when the full PINES functionality is unavailable – during a PINES upgrade, or unexpected outage, when a libraries internet or local network service goes down, or when doing outreach in an area without an available internet connection.

Rather than shutting down all circulation operations or trying to track checkouts on paper, you can use the Evergreen Offline Interface to process checkouts. There are several advantages over the paper method, 1) the barcode scanner can be used to reduce typing errors and save time, and 2) a receipt will print after each checkout.

This interface stores a local transactions file that contains information about all of the circulation actions made while offline. When the computer can reconnect to the PINES server, that offline file must be uploaded and processed as soon as possible.

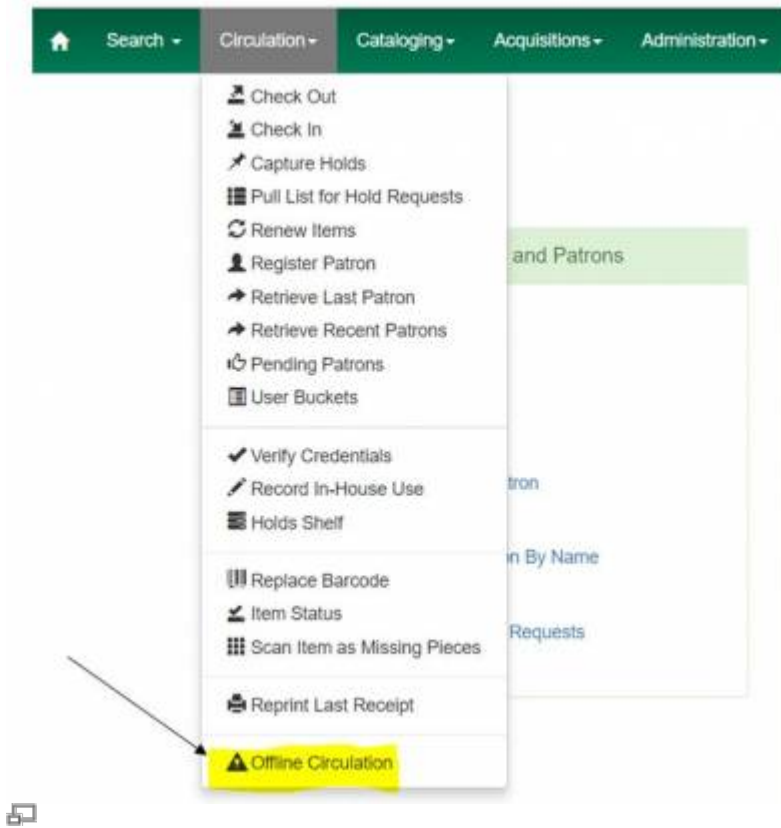


**Do Not Clear Cookies or Local Database:** Offline transactions are stored locally within the browser's built-in storage. If you perform offline transactions and then clear your cookies or delete your browser's local database before uploading the offline transactions to the server, then those offline transactions will be lost. (Clearing cache is fine.)

## Set Up

Prior to using the web-based offline interface for the first time, you will need to:

1. Bookmark the offline circulation page in your browser:
  - <https://gapines.org/eg/staff/offline-interface>
2. If you are using Hatch, you may need to disable it in order to print while offline.
3. Log in to the staff client, register a workstation, and click through the Check Out, Check In, and Register Patron pages (this loads information into the browser's local storage for use when offline).

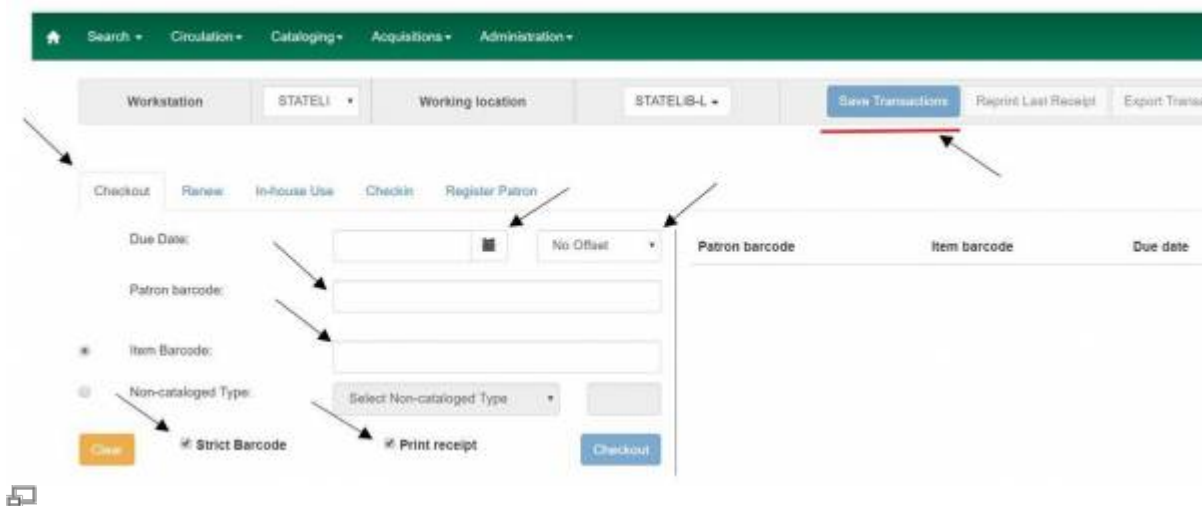


## Using the Offline Interface

### Start

1. Open the Offline Interface: <https://gapines.org/eg/staff/offline-interface>
2. Verify that the Workstation and Working Location are correct.

### Checkout



1. Click on the Checkout tab.
2. Set the Due Date either by using the calendar *OR* by changing the Offset dropdown to "Today + 14"

- Days" (or whatever time period is appropriate for the item type).
3. Check the Print Receipt box.
4. Scan the patron barcode.
5. Scan an item barcode.
  - Or, circulate honor-system items by using the Non-cataloged Type option and the number counter.
6. Click Checkout after each item. This will display the item to the right.
7. When all items for the patron have been checked out, click the Save Transactions button at the top of the page.

## Renew

The offline interface does not provide information about what items a patron already has checked out, how many times the patron has already renewed their items, or if the items they are renewing are on hold for another patron. So, if a library chooses to renew items through this interface, the system will provide a list of errors when the offline file is uploaded that staff will need to follow up on.

1. Click on the Renew tab.
2. Set the Due Date either by using the calendar *OR* by changing the Offset dropdown to "Today + 14 Days" (or whatever time period is appropriate for the item type).
3. Check the Print Receipt box.
4. Scan the patron barcode.
5. Scan an item barcode.
6. Click Renew after each item. This will display the item to the right.
7. When all items for the patron have been renewed, click the Save Transactions button at the top of the page.

## In-house Use

1. Click on the In-house Use tab. (Do *not* check the Print Receipt box.)
2. Scan an item barcode.
3. Click Record Use after each item. This will display the item to the right.
4. When all in-house use items have been scanned, click the Save Transactions button at the top of the page.

## Checkin

The Checkin function **should not be used in PINES** because it will not be able to alert staff if the item has any holds, transits, routing alerts, or any other type of statuses that require staff attention.

## Register Patron

The offline interface has no way of knowing whether or not the patron that is applying for a library card already has a card in the system. If your library chooses to register patrons using the offline interface, you will need to be very diligent about checking each new account for older duplicate cards after you reconnect to the server. If you find duplicates, create a help desk ticket for each one so that they may be merged (see: [Multiple Patron Accounts / Patron Record Merging](#)).

1. Click the Register Patron tab.

2. Verify that the screen is showing All Fields.
3. Complete the registration form as you normally would (see: [Creating New Patron Accounts](#)).
4. Click the Save button.
5. Click the Save Transactions button.

## Uploading the Offline Transactions

Sign In

Username

Password

Workstation

**Unprocessed offline transactions waiting for upload**

Once you are able to reconnect to the PINES server and log into Evergreen, you will need to upload and process all of the activities that were recorded while you were offline. (This needs to be repeated for each workstation that used the offline interface.)

Workstation: STATELIB-L-Dawn Working location: STATELIB-L

Session Management | Checkout | Renew | In-house Use | Checkin | Register Patron

Pending Transactions | **Offline Sessions**

**Session List**

Organization	Created By	Description	Date Created	Upload Count	Transactions Processed	Date Completed
STATELIB-L	McCarra	test from old client	1/3/2018 12:08 PM	5	5	1/3/2018 12:06 PM
STATELIB-L	McCarra	upgrade test	1/15/2017 5:20 PM	1	1	1/15/2017 5:20 PM

1. Log in and go to Circulation > Offline Circulation.
2. Click on the Session Management tab.
3. Click on the Offline Sessions tab.
4. Click the Create Session button and enter a name for that session (ex: Upgrade CircComputer1).
5. Select / highlight the new session you created.
6. Click the Upload button.
7. After uploading, click the Process button (the processing step must be done by a staff member logged in as a LibraryManager or LocalAdmin).
8. When processing is complete, scroll down to the very bottom of the screen to see the Exceptions List.
9. Go through each item in the exception list and investigate and correct the problem. The Item and

Patron buttons to the right of each row are clickable and will open in a new browser tab for convenience.

## Definitions of Exceptions

### **ACTOR\_CARD\_NOT\_FOUND**

Indicates the patron's library barcode was mis-scanned/mis-typed. Attempt to correct it if you can determine the error, but that may not be possible.

### **ASSET\_COPY\_NOT\_FOUND**

Indicates the item barcode was mis-scanned/mis-typed. Attempt to correct it if you can determine the error, but that may not be possible.

### **CIRC\_CLAIMS\_RETURNED**

Indicates a book previously marked as claimed returned was found and checked out. Check the current patron to be sure it is checked out correctly, and check the item's history to make sure any erroneous messages or fines are removed from the prior patron's account.

### **COPY\_IN\_TRANSIT**

Indicates a book was checked out that had been marked as in transit. Check the patron to make sure that the book was checked out correctly to his or her account.

### **COPY\_STATUS\_LOST**

Indicates a book previously marked as lost was found and checked in.

### **MAX\_RENEWALS\_REACHED**

Since the patron already has the item in hand, you will need to go into the patron's account and either override the extra renewal to allow it or change the due date to the new due date.

### **OPEN\_CIRCULATION\_EXISTS**

Indicates a book was checked out that had never been checked in. This is not usually an issue because the book should usually appear on the patron's account correctly even though the error appears on this list. However, you should look up the item's history to be sure that it is showing up correctly and no longer indicates that it is checked out to the previous patron.

### **PATRON\_ACCOUNT\_EXPIRED:**

If you are downloading the offline patron list on a daily basis, and if the Circulation Staff are paying attention to the error messages that pop up while using the Standalone Client, you should rarely see this error. On the occasions you do see it, go into the patron's account and renew their card for a few days. Make a note in the patron's account to renew their card the next time they are in the library and check out the items to that card. You may also wish to add a message to the Patron Message Center (see: [Alerts, Notes, and Messages](#)) to alert them that they'll need to renew their card (see: [Card Expiration and Renewal](#)) the next time they come into the library.

## Problems That May Not Generate Exceptions



- Checking out an item with an incorrect borrowing time.
- Attempting to re-check out an overdue book.
- Checking out a reference book.
- Checking out an item belonging to another library.
- Checking out a book on hold for another patron.

## Importing and Exporting Pending Transactions

If for some reason the workstation that was used for offline circulation cannot be used to upload the transactions file, that file can be exported and then imported into a different workstation for uploading and processing.

1. On the workstation that was used for offline circulation:
  - Go to the Offline Circulation interface.
  - Click on the Export Transactions button.
  - Save the file to a convenient location (do not change the name or formatting or add a file extension).
2. On the workstation that is connected to PINES:
  - Log in and go to Circulation > Offline Circulation.
  - Click on the Session Management tab.
  - Click on the Pending Transactions tab.
  - Click on the Import Transactions button.
  - Select the offline file that you saved in step 1.
  - Go to the Offline Sessions tab and upload and process as normal.

## Viewing Offline Transactions without Exporting

The easiest way to view offline transactions before uploading them is to export them. However, if that is not possible, you can view them via the browser's internal tools. (Clearing your browser's local storage (cache) will erase the offline transaction data, and you will no longer be able to access it.)

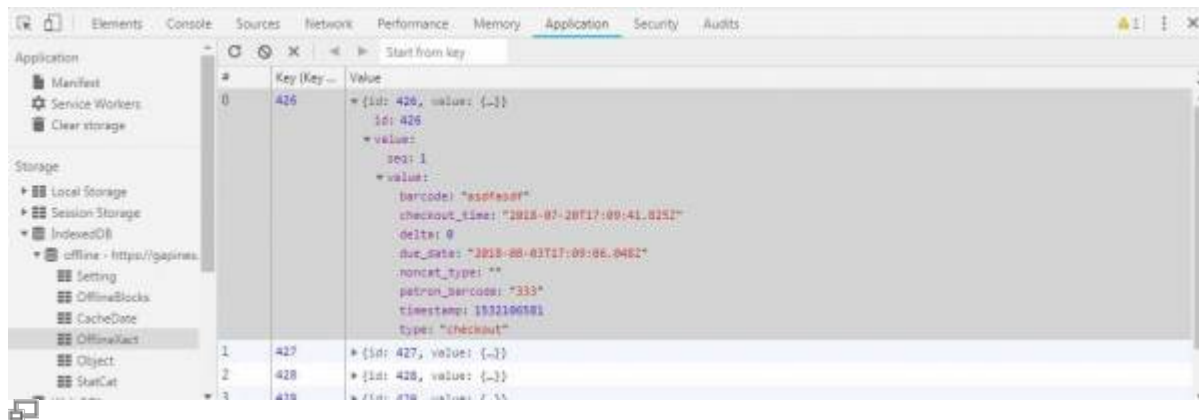
### In Firefox:

1. Click on the Menu icon (three dashes) > Web Developer > Storage Inspector
2. Expand Indexed DB
3. Expand <https://gapines.org>
4. Expand offline (default)
5. Click on offlineXact
6. You should be able to view the value for each offline transaction that has not yet been uploaded.



## In Chrome:

1. Click on the Menu icon (three dots) > More Tools > Developer Tools
2. Switch to Application tab
3. Expand Indexed DB
4. Expand the offline <https://gapines.org> section
5. Click on offlineXact
6. Expand each row to see the data.



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<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:circulation:offline>

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# Hold

PINES patrons may place holds on books owned by any PINES library, as well as on certain additional types of materials (such as audio-visual materials) within their own local library system. Items which are placed on hold will be delivered via courier from the owning library to the patron's desired pickup library.

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].

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.

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.

## Placing Holds

- 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].
- Patrons whose PINES cards are expired will not be allowed to place holds until the card privilege is renewed.
- 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.
- 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.
- Hold requests expire after 6 months with the option for staff or patron to make it an earlier or later date [2008.02].

## Pulling Holds

An automated process (the Holds Targeter) runs periodically throughout the day and identifies copies of items at PINES libraries that can fulfill holds.

Each weekday (M-F) morning, each PINES library location will print a report (the Pull List) of items on their shelves which have hold requests (Circulation > Pull List for Hold Requests). The items on this list should be retrieved from the shelves and processed within 24 hours.

If an item should be on the shelf but cannot be found, mark the item Missing (Circulation > Item Status > Scan Barcode > Actions > Mark Item as Missing). This will direct the Holds Targeter to look for a different copy of the item 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.

Libraries may choose to pull and process holds more than once per day if desired, and may also choose to pull and process holds on weekend days if desired.

## Processing Holds

After pulling items from the shelves (or when receiving items routed to your location to fulfill a hold from another location), scan them into the Checkin Interface (Circulation > Capture Holds).

If the item being scanned is on hold for a local patron, the system will print a Hold Slip that contains the patron's contact information. If the patron has chosen to be notified by email, an email will be automatically generated within the hour and sent to the address on file. If the patron has chosen to be notified by telephone, then staff must call the patron. The item should then be placed on the Holds Shelf.

If the item being scanned is on hold for a patron of another location, the system will print a Transit Slip and staff will place the item in transit. 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].

The library should keep the hold or transit slip with the item (most libraries will insert the slip into a book with the slip showing), but should never use tape to attach the slip to a book [2019.09].

### Additional information:

- 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.
- A database of PINES delivery addresses in mailing label format is provided to each library (see [Library Routing, Courier, and Contact Info](#)); you can print out the addresses needed on demand. For convenience, the Evergreen receipt templates for transit items are configured by default to print the library policy name and courier code for each item (see [Print Templates](#)). All items should be sent out within 24 hours of receipt of the holds list.
- Items should be placed in a green PINES courier bag with the courier code and library policy name in clearly showing through the window of the bag. Multiple items may be placed in a green bag, but

all items within a bag must be destined for a single library branch (ie, an item going to ARL-ATH and an item going to ARL-BOG must be packaged in separate bags).

- 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 and who have chosen to be notified by email. Each library is responsible for contacting users who have chosen to be telephoned regarding available holds. No paper notices will be mailed centrally.
- Holds will also be captured in the normal course of checking in items. These holds should be processed and routed within 24 hours.

## The Holds Shelf

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.

## Clearing the Holds Shelf

Staff should monitor the holds shelf and remove items that have not been picked up within the designated amount of time or whose holds have been cancelled.

### **Identify the holds which should be placed back into circulation.**

1. View the holds shelf (Circulation > Holds Shelf). The list you see should match the books that are actually present on your holds shelf. (Sorting is not available in the 2.12 web client, but is targeted to be available in the 3.0 web client.)
2. Determine which items should be pulled off of the holds shelf.
  - If you check the View Clearable Holds box, it will show you which items have been on the holds shelf for more than 7 days.
  - The Available On column displays the date that the item was actually placed on the holds shelf.
  - Each library system may determine how many days to allow their own items to remain on the holds shelf. However, items belonging to a different library system should not be held for more than 7 days.
3. Scan the items in the Checkin interface using the 'Clear Holds Shelf' Checkin Modifier (see [Checkin Modifiers](#)).
  - If you have checked the View Clearable Holds box and you press the Clear These Holds button, the current holds for the listed items are all cancelled at once, but their item status will still read 'On holds shelf' until you check the items in. If you use this method, you do not need to use the 'Clear Holds Shelf' Checkin Modifier, you can just check the books in as normal.
  - If you use the 'Clear Holds Shelf' Checkin Modifier, be sure to disable the modifier before checking in other books. (On the Check In screen, press the Checkin Modifiers button on the bottom-right of the screen and select Clear Holds Shelf to remove the checkmark.)

## Checking in Returned Holds

When a patron returns an item that is owned by another library, the system will print out a transit slip directing the staff to return the item to the owning library (or to the next location waiting for a hold on the item). Route these items to the appropriate location within 24 hours of their return.

## Suspending Holds

A hold can be placed on an item and then suspended (inactivated) until a later date by staff or the patron. The holds targeter will ignore these holds while they are inactive.

If an activation date is set, the system will automatically reactivate the hold on the set date. If not, the hold will not reactivate until manually reactivated by the patron or by library staff.

## Changing the Pickup Location of a Hold

A staff member or a patron may change the pickup library of a hold after the hold has been placed. 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.

A patron may change the pickup location of a hold by going to My Account > Holds, then clicking the 'Edit' link next to the title.

Staff may change the pickup location of a hold from the Holds Shelf screen or from the Patron's Hold screen (Actions > Edit Pickup Library).

If the hold has its pickup library changed while it is in transit to the original pickup library, when it arrives and is scanned in, it will print a new transit slip to the new pickup library.

If the hold has its pickup library changed after it has already arrived at the original pickup library, the Status on the Holds Shelf screen will say 'Wrong Shelf.' If staff see the Wrong Shelf status, staff should re-scan the item on the check in screen in order to place it into transit to the new destination.

## Holds Behind Circ Desk

A library may choose to have the holds shelf located in a staff-only area or in a public area where patrons can retrieve their own holds. Libraries that have public holds shelves can offer patrons the ability to request that their holds are placed in a private area. To make use of this feature, the library should set the "Behind Desk Pickup Supported" option to "true" in the Library Settings Editor. This will display a "Hold is behind Circ Desk" option on the patron information screen. Hold slips for these patrons will print with the notation "PRIVATE HOLDS SHELF" and all other hold slips will print with the notation "PUBLIC

HOLDS SHELF" [2014.05].

## 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]

### A-V Items and Other Restricted Items

Under normal circumstance, PINES does not allow intra-PINES loans on the following item categories:

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

Items of these types may be placed on hold only 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.

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]

## Age Protection

Age Protection allows libraries to prevent holds on new books (on a copy by copy basis) from outside the owning library's branch or system for a designated amount of time. The purpose of this is to give the library's local patrons a chance to check out the new book before sending it off to other libraries. Libraries typically use this feature for popular fiction, but may also choose to use it for any or all other new books.

Each item (copy) has an "age\_protect" flag which may be set to 3 month, 6 month, or None (based on the item's activation date):

- If set to "3 month" and the item was made active less than 3 months ago, the item is only holdable by patrons whose home library matches the circulating library of the copy. (Note: The system interprets 3 months as 90 days.) After 3 months, the item will automatically roll over to 6 month age protection.
- If "6 month" is set and the item was made active less than 6 months ago, the item is only holdable by patrons whose home library is within the same system as the circulating library of the item. (Note: The system interprets 6 months as 180 days.) After 6 months is over, the item will no longer be age protected and holds may be placed on it from any PINES location, but the age\_protect flag will still appear as "6 month."
- If age protect is set to None, then no age protection occurs and the holds can be placed on the item from any PINES location.

## Book Club Holds

Library staff may place up to 20 holds on a single title at once for the purpose of obtaining copies for book clubs. To use, place a title-level hold as normal but select a number from the Number of Copies dropdown list. [2019.01]

## Holds on Multi-Part Items

See: [Instructions for Circulation and Reference Staff \(Video\)](#)

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# Bills

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.

See: [PINES Circulation Matrix](#)

Historical Note: On July 1, 2012, the fine rate for books increased from \$0.15 to \$0.20 per day [2012.05].

## Paying Fines/Fees

PINES fines may be paid at any participating library. If the patron's home library is configured to accept online credit card payments, then that patron may also log in to the "My Account" section of the OPAC and pay their bills online.

Returned materials which are owned by other PINES libraries will be promptly returned via the PINES courier service. 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].

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].

- See also: [Collection/Materials Recovery Agencies](#)
- See also: [Payment Retention and Reimbursal](#)
- See also: [Unrecovered Debt](#)

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:bills>

Last update: **2018/10/19 13:28**

# Bankruptcies

The Library will discharge a patron's debt that has been lawfully discharged in bankruptcy.

1. Before the Library will discharge a patron's debt, the patron must provide a copy of a valid court order discharging the patron's debt.
2. Library fines for overdue materials (this does not include debt for damaged or lost materials) may not be discharged in bankruptcy and will remain the responsibility of the patron.
3. If a patron's borrowing privileges are currently suspended pursuant to section 3.0 of the Library's Loan Policy, the patron may request reinstatement based on a lawful court order discharging the patron's dischargeable library debt, provided the patron has returned all overdue materials that have an active item record and paid all non-dischargeable and other current debt due to the Library.
4. If the patron in bankruptcy is responsible for a juvenile account, the same policies apply.

See also: [Marti Minor's Presentation at the Fall 2020 Public Library Directors Meeting](#)

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Last update: **2020/10/09 17:39**

# 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 and procedures apply to this arrangement within PINES:

- 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].
- When a patron is referred to collections, a Note or Alert should be added to the patron account to indicate which library took action.
- Only the referring library may remove the collections status.
- Patron accounts in collections status may be paid at any PINES library. Payments will be retained by the collection library unless the owning library sends an invoice for payment reimbursement to the collection library within 90 days of the payment date. [2018.09] Collection agency fees that are automatically added to the accounts that have been referred to collections may also be invoiced if they are paid at the non-referring library.



Prior to September 2018, patrons whose accounts were in collections status were required to pay their bill at the referring library [2003.05].

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<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:bills:collections>

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# Credit Card Payments

## At the Desk

Libraries may contract with the credit card processing vendor of choice (many libraries have chosen Square) to accept credit card payments at the desk. These vendors are not connected to PINES, so any payments that are accepted in this way will need to also be entered by staff in order to update the patron's account.

## Through the OPAC

Libraries may opt to take credit card payments online through the OPAC. When patrons log in to My Account, if their home library has credit card payments enabled then they will see the ability to pay online. (If the home library does not have credit card payments enabled, the patron will just see the fine information, but not the option to pay online.)

### Stripe

To date, every PINES library that has opted to accept credit card payments has chosen Stripe as the vendor of choice.

1. Set up an account with Stripe
  - <http://www.stripe.com>
  - A single account can be created for all branches in the regional system, or separate accounts can be created for each branch.
2. After setup, Stripe will provide you with four keys for each account.
  - test private key, test public key, live private key, live public key
3. Submit a [Help Desk](#) ticket with the four keys and which system or branch they should be applied to.
4. PINES staff will enable the appropriate options on your account and patrons will be able to begin online payments immediately.

### Other Vendors

Evergreen is also capable of connecting with Authorize.net and with PayPal. If you wish to use one of those vendors instead of Stripe, contact the Help Desk for assistance.

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Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:bills:creditcards>

Last update: **2018/10/11 16:15**



# Deposit-Handling Suggestions

Some PINES libraries choose to require deposits in order to check out certain high-value or high-loss materials such as test preparation (GED, ASVAB, etc.) books.

A library system that chooses to require deposits on select items will determine its own local procedures for handling deposits. This page consists of suggestions based on the existing practices of various PINES library systems, but while one approach may work for one library, it may not work for another depending on staffing structure and the way that funds are held and balanced. Please use the following information as suggestions only and be sure that whatever procedure you follow within your own library system is consistent, clearly documented, and follows all money-handling guidelines your system is required to follow.

## General Notes

- The library system will determine which items will require deposits.
- The library system will determine whether or not to place copy alerts on the item's record.
- The library system will determine the amount of the deposit required for the item.
- The library system will determine where the deposit items are stored (most libraries store them behind the desk).
- The library system may choose to set up the copy record so that it will bill the patron account automatically upon checkout. Other libraries may choose to add bills to the patron accounts manually.
- Some library systems place stickers on the cover of the books indicating that deposit is required and stating the amount of the deposit required.
- Some library systems will accept non-monetary items (such as a driver's license) instead of a cash deposit for items that are for in-house use only. These situations are not typically logged in detail.
- Some library systems choose to use the Evergreen software to track deposits and refunded deposits, but others choose to create paper logs manually. If a library is required to reconcile its cash drawer with the cash report produced by Evergreen, then the library might prefer handling the deposit money separately from Evergreen for bookkeeping simplicity. However, if it is more important to a library to track the deposited funds and returned deposits within the patron accounts, then the library might prefer handling the deposits within Evergreen. Each library system should determine what approach works best for their individual situation.
- It is good practice to have the guidelines and procedures for deposits posted publicly (perhaps at the circulation desk or on the library's web site) so that the library's patrons can easily refer to them. One library system even takes the extra step of providing borrowers of these items with bookmarks that remind them to pick up their deposits when they return the items. The bookmark informs them that if the item is long overdue or lost, the deposit will go towards the cost of the item. It also informs them that if the person has returned the item but has not picked up their deposit, the deposit will be considered a donation.
- PINES policy states that items requiring deposits should be non-holdable outside their own library systems, but the software does not currently have this functionality.

## Managing Deposits Manually

### Checkout

Staff accepts the deposit (check or cash) and places it in a secure location. Libraries typically place the deposit in an envelope or bag (such as a pencil bag) labelled with the patron's name, library card number, date of checkout, book title, and barcode. Some libraries also keep a deposit log that patrons sign when they make a deposit and when they receive their returned deposit - this log is useful to have in case someone claims to have not received their returned deposit. It is good practice to have the library staff members that receive and return the deposits initial and date the log entry and/or envelope as well.

### Renewal

If the patron wishes to renew the item, any alert is overridden and the patron is not required to provide a second deposit.

### Return

When the patron returns the item, the staff will return the deposit that was being kept aside for the patron. If the item is labelled or has a copy alert on it, then the staff processing the returned item should notice that the patron is due the returned deposit. If the library is keeping a paper log, then the patron should sign that he or she received the returned deposit.

## Managing Deposits with Evergreen

### Checkout

The patron is billed for the deposit amount. This can be set up to happen automatically or the staff member can add it manually by opening the patron's account then clicking Bills > Bill Patron. If adding manually, the staff member should choose "Deposit Fee" as the Billing Type and enter the item's title and barcode, as well as the staff member's initials, location, and date.

Staff accepts payment for the bill and records the payment to the account (select the appropriate billing line item, choose the Payment Type, enter the amount of Payment Received, then click Apply Payment). Doing this ensures that the bill does not go above \$10 due to a deposit charge and that there is a record of the transaction on the account.

Staff places the deposit in a secure location (typically in an envelope labelled with the patron's name, library card number, date of checkout, book title, and barcode) and if necessary, records the amount in a paper log as well.

### Renewal

If the item is set up to bill the patron automatically and the patron renews the item, the patron will be billed a second time. If this occurs, staff should Void that bill.

## Return

When the patron returns the item, go to Bills > History > select the appropriate Bill and click Full Details. You should see that the Deposit fee was charged and paid. Close the pop-up window.

On the Bills > History screen, click Add Billing. Choose Billing Type of "Refund: Deposit Item Returned" with an amount of zero (0) and enter an annotation with the staff initials, date, and location. (After saving, if you look at the Full Details, you will see that it added a line item to the bill indicating that the deposit had been returned.)

Staff returns the deposit that was being kept aside for the patron. If the library is also keeping a paper log, then the patron should sign that he or she received the returned deposit.

## When a Patron Does Not Return the Item

If the book is not returned and ends up marked Long Overdue or Lost, the library may credit the deposit against the price of the book. If a personal check was used as a deposit, the library may wish to resolve the issue sooner rather than later because the personal check may no longer be valid after several months.

## When a Patron Does Not Pick Up the Deposit

If an item has been returned but the patron has not picked up the deposit, it is good practice to place an alert on the patron's account so that the deposit may be returned on the patron's next visit. If the deposit has not been picked up after a pre-determined amount of time, the library may consider it a donation (the library's policy on this should be clearly indicated in the documentation).

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:bills:deposits>

Last update: **2018/10/11 16:15**



# Max Fines vs. Max Bills

The terms 'Max Fines' and 'Max Bills' can be easily confused, so the descriptions below are written to distinguish between the two.

## Maximum Bills

*Relates to patrons.*

Once a PINES patron reaches (or surpasses) \$10.00 in fines and fees, the patron's account is automatically blocked. The patron will be unable to check out or renew items until the total amount owed on his or her account drops below \$10.00.

Depending on which local library system the patron uses, the patron might also lose access to public computers and downloadable ebooks/audiobooks. There is no maximum limit on how high a patron's bills might go, although many PINES libraries will refer patrons to collection agencies once they reach a certain point and do not pay it within a certain amount of time.

## Max Fine Levels

*Relates to items.*

Each library system within PINES chooses the Max Fine Level they wish to use for overdue fines. Most library systems use \$5.00, but a few use a higher amount (see the [PINES Circulation Matrix](#)). If the Max Fine Level is set to \$5.00, then overdue fines on an item will accrue each day the item is overdue until the fines reach \$5.00 and will then stop. If the patron has multiple items checked out and overdue, then the fines on each one will accrue until each of them reach \$5.00.

If an item is not returned and marked as either Lost or Long Overdue, the overdue fines are removed and the patron is billed for the cost of the item instead. Some library systems will also charge a non-refundable processing fee if this happens.

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Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:bills:max>

Last update: **2019/03/20 12:24**

# Forgive vs. Void

In general terms, “void” indicates that the bill was incorrect and “forgive” indicates that the bill was correct, but that the library chose to waive it.

“Void” is also used by the system for various purposes - for example, if an item is marked Lost, the overdue fines that were on the item are voided by the system when the item value is added so that the patron isn't charged for both the full cost of the item *and* the overdue fines.

Voided line items on a bill will appear in the staff client, but bills that are entirely voided do not appear in the staff client and are only available through reports. There are PINES Quick Reports available to assist with reviewing forgivals and voids:

- PINES Quick Reports > Bills > Bills Voided Within a Date Range
- PINES Quick Reports > Bills > Detailed Forgive and Work Payments

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:bills:forgive-void>

Last update: **2019/02/04 16:17**

# Negative Balances and Refunds

There are several scenarios that may result in a patron account showing a negative balance or credit. PINES policy states that patrons are not allowed to carry a credit balance on their account, so accounts that show negative balances should be reviewed regularly and balanced. In some cases, the patron is due a refund, and in other cases they are not.

## Obtaining a List of Patrons with Negative Balances

Open the Evergreen Staff Client and go to: *Administration > Local Administration > Patrons with Negative Balances*

This screen may take some time to load. It will default to the library location that your workstation is registered to. After it loads, you may select a different library location.

Double-click on any resulting patron to open that patron's record.

## Investigating a Negative Balance

1. Open the patron's account in the Evergreen Staff Client and click on Bills.
2. Review the bills to determine the cause of the negative balance.
3. Right-click on a line item and View Full Details to see detailed information about that bill number. This shows each charge (including voided charges) and each payment that was applied to that bill number. If an item has been both voided and forgiven, or voided and paid for, or forgiven and paid for, you should see evidence of it on this screen.
4. You may also wish to look at the history (from the main Bills screen, click the History button). From here you may view all Transactions or limit to all Payments for any specified time period.

## Correcting a Negative Balance Caused by a Bill Being Forgiven and Voided

If you see that charges were voided under the Bills section, but also paid or forgiven under the Payments section, then that would explain how the bill number ended up with a credit that should not be there. In this scenario, the patron is not due a refund. To correct this, add a bill to that bill number for the amount of the incorrect credit:

1. From the patron's account, open the Bills screen.
2. Right-click on a listed bill and click Full Details to confirm that the problem is that a bill was both voided and forgiven.
3. Return to the main Bills screen.

4. Right-click on the bill and click Add Billing.
5. A pop-up window will open.
6. Choose Miscellaneous as the Billing Type.
7. Enter the Amount needed to balance the bill (if the balance owed showed -2.60, then enter 2.60).
8. Enter a detailed Note explaining the added bill (for example, "Bill #12345 - Fines were forgiven and voided in error. Adding bill for \$2.60 to balance the account. TMcCanna STATELIB-A 1/25/2018")
9. Click Submit Bill.
10. Click the Refresh button to refresh the main Bills screen to see the balanced account - this is sometimes cached and you may need to close the patron account and reopen it to see the balanced account.

See Also:

- Walkthrough - Negative balance caused by a bill being forgiven and voided
- Walkthrough - Correcting problems caused by an incorrect attempt to fix a negative balance

## Refunds

PINES policy states that if a lost item is paid for in full, but then found and returned by the patron within six months (180 days) of payment, then the owning library should refund the payment minus any overdue fees that had been automatically voided when the item was marked lost, and minus any processing fees which had been applied.

### 1) Verify that the refund is due.

1. From the main Bills screen on the patron's account, right-click on the bill that is incorrectly showing a negative balance and click Full Details.
2. Confirm that the problem is that an item was paid for (the payment information should be in the Payments section) and then voided (in the Bills section, Voided will be 'Yes' and the Note will say 'VOIDED FOR LOST ITEM RETURNED' on the charge for Lost Materials).
3. Review the payment date and the Voided date to confirm that the item was returned within 6 months (180 days) of payment. If the item was returned after that date, then no refund is due to the patron. If it was within that 6 months, then the patron is due the amount they paid minus any overdue charges that had been voided, minus any processing fee. Make a note of how much money is actually owed to the patron for a refund.
4. Return to the main Bills screen.

### 2) Confirm the amount of the refund.

1. Confirm that the amount showing as owed to the patron matches what you have calculated in your investigation. If the displayed number is incorrect due to other billing issues or errors, correct each of them until the amount shown is correct.

### 3) Process the refund.

1. From the Bills screen, place a check mark in the box on the billing line with the negative amount owed.

Check Out Items Out (0) Holds (0 / 0) Bills **4.75** Messages Edit Other Patron Search

**Pay Bill**

Total Owed:	-4.75	Refunds Available:	\$4.75
Total Billed:	\$11.40	Session Voided:	\$0.00
Total Paid/Credited:	\$16.15		

Owed for Selected: \$0.00 Pending Payment: \$0.00  
 Billed for Selected: \$0.00 Pending Change: \$0.00  
 Paid/Credited for Selected: \$0.00

Payment Type: Cash  
 Check Number:   
 Payment Received:   
 Annotate  Apply Payment

Bill Patron History Check All Refunds

#	Status	Payment Pending	Billing Location	Barcode	Title	Owning Library	Type	Total Paid	Total Billed	Start	Bill #	Balance Owed
1		\$0.00	HOU-CV	3102800581...	Easter...story...	HOU-CV	circulation	\$16.15	\$11.40	09/29/2018 1...	195186462	-4.75

Receipt On Payment # Items 1

Bill Patron History Check All Refunds

#	Status	Payment Pending	Billing Location	Barcode	Title	Owning Library	Type	Total Paid	Total Billed	Start	Bill #	Balance Owed
1		-4.75	HOU-CV	3102800581...	Easter...story...	HOU-CV	circulation	\$16.15	\$11.40	09/29/2018 1...	195186462	-4.75

Receipt On Payment # Items 1

2. Check the Annotate Payment box.
3. Enter the amount of the refund in the "Payment Received" box. This is because this is the payment the *patron will receive* from the library. The system understands that a refund is being processed and that the library is not receiving any money from the patron.

**Pay Bill**

Payment Type: Cash  
 Check Number:   
 Payment Received:   
 Annotate  Apply Payment

Receipt On Payment # Items 1

Total Paid	Total Billed	Start	Bill #	Balance Owed
\$16.15	\$11.40	09/29/2018 1...	195186462	-4.75

Receipt On Payment # Items 1

4. Change the number of receipts to the number you will need for your libraries processes. (The test server shows # item instead of # receipts as it should.)

### Pay Bill

**Payment Type**

**Check Number**

**Payment Received**

**Annotate**

Item Number	Type	Total Paid	Total Billed	Start	Bill #	Balance Ow
ABC R...	circulation	\$16.15	\$11.40	09/29/201...	19518646...	-4.75

Receipt On Payment # Items

5. Click Apply Payment.

### Pay Bill

**Payment Type**

**Check Number**

**Payment Received**

**Annotate**

Total Paid	Total Billed	Start	Bill #	Balance Owed
\$16.15	\$11.40	09/29/2018 1...	195186462	-4.75

Receipt On Payment # Items

- Enter annotation (for example, "Refund check request for \$9.99 sent to business office on 6/25/2020 JDoe").
- Click OK.
- If cash reports are used a copy of the receipt will need to be placed in the register to account for the difference in the actual cash and the cash report. Another copy of the receipt should be sent to the business office with the check request as justification for the request. If the patron is present a copy of the receipt can be given stating how much they will receive in the form of a check.
- Click the Refresh button to refresh the main Bills screen to see the balanced account - this is sometimes cached and you may need to close the patron account and reopen it to see the balanced account.

Currently there is a bug in the refund process. If there is more than one billing line that has a negative amount due, each billing line must be processed as a separate refund. The system will not process them together.

Also, if a patron owes money and has a refund, the refund must be sorted to the top of the bills to be processed. Once the refund is processed, the fines due can be paid with the refund amount. The patron will then receive a check for the difference in the fines owed and the refund if there is any negative amount still due the patron. Multiple receipts for the fines paid would need to be printed to account for the difference in the amount of the refund receipt and the actual refund amount.

## Sources of Confusion

There are a few options you might encounter in the Evergreen Staff Client that do not work the way you might expect them to for PINES, so we recommend that you do not use them.

- If you right-click on a bill and click Refund, it will add the dollar amount to the Payment Pending column, but does not complete the Refund. You would still need to click Apply Payment to complete the process. For PINES libraries doing refunds, it is usually better to click Check All Refunds and then Apply Payment.
- If you right-click on a bill and click Add Billing, one of the Billing Types is Refund: Lost Item Returned. If you use this, it may appear to balance the account (unless there are other fines and fees on the account), but the transactions will not show up under Bill History. For PINES libraries doing refunds, it is usually better to click Check All Refunds and then Apply Payment.

## Help Desk

If you are unable to identify the cause of the negative balance or unable to correct it, please submit a detailed Help Desk ticket.

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<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:bills:negative-balances>

Last update: **2020/03/05 15:37**

Processing fees for lost and long overdue items are determined independently by each library system. If a lost or long overdue item is paid for but then found and returned within 180 days of the payment date, the amount paid should be refunded minus the item's overdue fees and processing fee.

<b>PINES Policy Name</b>	<b>Branch</b>	<b>System Name</b>	<b>Processing Fees (Lost / Long Overdue / Damaged*)</b>
ARL	All locations	Athens Regional Library System	10/10/10
ARCPLS	All locations	Augusta-Richmond County Public Library	5/5/5
AZRLS	All locations	Azalea Regional Library System	10/10/10
BROOK	All locations	Brooks County Public Library	0/0/0
BTRL	All locations	Bartram Trail Regional Library	5/5/5
CCL	All locations	Catoosa County Library	0/0/0
CHRL	All locations	Cherokee Regional Library	3/3/3
CLAYTN	All locations	Clayton County Library System	10/0/0
CPRL	All locations	Coastal Plain Regional Library	5/5/5
CRLS	All locations	Chestatee Regional Library System	10/10/10
DCPL	All locations	Dougherty County Public Library	10/10/10
DTRL	All locations	Desoto Trail Regional Library	2/2/2
ECPL	All locations	Elbert County Public Library	0/0/0
FRRLS	All locations	Flint River Regional Library	10/10/10
GCHR	All locations	Greater Clarks Hill Regional Library	5/5/5
HALL	All locations	Hall County Library System	5/5/5
HART	All locations	Hart County Library System	10/10/10
HCLS	All locations	Henry County Library	10/10/10
HOU	All locations	Houston County Public Library	5/10/5
JCL	All locations	Jefferson County Library	0/0/0
KRLS	All locations	Kinchafoonee Regional Library	5/5/5
LBRLS	All locations	Lake Blackshear Regional Library System	10/10/10
LEE	All locations	Lee County Public Library	0/0/0
LOPL	All locations	Live Oak Public Library	5/5/5
MCCLS	All locations	Moultrie-Colquitt County Library	0/0/0
MGRL	All locations	Middle Georgia Regional Library	10/10/10
MOGL	All locations	Marshes of Glynn Libraries	5/5/5
MRLS	All locations	Mountain Regional Library	10/10/10
NCLS	All locations	Newton County Library System	10/10/10
NEG	All locations	Northeast Georgia Regional Library	0/0/0
NGRL	All locations	Northwest Georgia Regional Library	4/4/4
OCRL	All locations	Oconee Regional Library	0/0/0
OHOOP	All locations	Ohoop Regional Library System	5/5/5
OKRL	All locations	Okefenokee Regional Library System	5/5/5
ORLS	All locations	Ocmulgee Regional Library System	0/0/0
PIED	All locations	Piedmont Regional Library System	5/5/5



<b>PINES Policy Name</b>	<b>Branch</b>	<b>System Name</b>	<b>Processing Fees (Lost / Long Overdue / Damaged*)</b>
PMRLS	All locations	Pine Mountain Regional Library System	5/5/5
PPL	All locations	Peach Public Libraries	10/10/10
RML	All locations	Roddenbery Memorial Library	10/10/10
ROCK	All locations	Conyers-Rockdale Library System	5/5/5
SGRL	All locations	South Georgia Regional Library System	0/0/0
SHRL-BK	Outreach Collection	Sara Hightower Regional Library	0/0/0
SHRL-CD	Cedartown Branch	Sara Hightower Regional Library	5/5/5
SHRL-CS	Cave Spring Branch	Sara Hightower Regional Library	5/5/5
SHRL-RK	Rockmart Branch	Sara Hightower Regional Library	5/5/5
SHRL-RM	Rome Branch	Sara Hightower Regional Library	5/5/5
SHRL-SU	Summerville Branch	Sara Hightower Regional Library	5/5/5
SHRL-TR	Trion Branch	Sara Hightower Regional Library	5/5/5
SJRLS	All locations	Screven-Jenkins Regional Library	5/5/5
SRL	All locations	Satilla Regional Library	0/0/0
STATELIB	All locations	Georgia Public Library Service	0/0/0
STRL	All locations	Statesboro Regional Library	0/0/0
SWGRL	All locations	Southwest Georgia Regional Library	0/0/0
TCPLS	All locations	Thomas County Public Library System	0/0/0
THRL	All locations	Troup-Harris Regional Library	5/5/5
TLLS	All locations	Twin Lakes Library System	10/10/10
TRRLS	All locations	Three Rivers Regional Library	5/5/5
WGRL	All locations	West Georgia Regional Library	3/3/3
WORTH	All locations	Worth County Library System	0/0/0

\* Damaged item processing fees were implemented on July 1, 2017. The Damaged Item processing fee is only automatically applied when the full item price is billed.

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

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Last update: **2021/03/11 09:25**

# Payment Retention and Reimbursement

Overdue fines will be retained by the collecting library, regardless of the original lending library [1999.10]. Payments for lost, damaged, or long overdue materials (along with any associated processing fees) will be retained by the collecting library unless the owning library sends an invoice for payment reimbursement to the collecting library within 90 days of the payment date [2016.09]. Collection agency fees that are paid at the non-referring library may also be invoiced [2018.09].

## Reports

The following Quick Reports are available to assist you in identifying payments that your library may request reimbursement for. Each line item on the resulting report must be investigated to determine the actual reimbursement amount, because the report is unable to determine partial payments, payments covering multiple bills, and payments that have already been refunded. There are three reports: the 'circulation' report includes payments that were made at a library on bills that the system created, the 'grocery' report includes payments that were made at a library on bills that were manually created, and the 'OPAC' report includes payments that were made via the OPAC on both circ and grocery bills.

- *PINES Quick Reports > Quick Report Templates > Bills > Invoice Report: Circulation Bills*
- *PINES Quick Reports > Quick Report Templates > Bills > Invoice Report: Grocery Bills*
- *PINES Quick Reports > Quick Report Templates > Bills > Invoice Report: OPAC Payments*

## Invoices

Invoices should be sent to the Headquarters Library for each system within 90 days of payment.

You may use the attached invoice below, or you may use your own library's standard invoice format as long as the following information is included:

- Bill Number
- Type of Bill (Lost, Long Overdue, Damaged, Collection Agency Fee)
- Payment Date
- Patron Barcode
- Patron Name
- Item Barcode
- Item Title

Sample Invoice

When sending payment for an invoice, a copy of the invoice should be included with the payment.

## Patrons in Collections

See: [Collection/Materials Recovery Agencies](#)

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:bills:reimbursal>

Last update: **2018/10/24 11:47**

# Unrecovered Debt / Uncollectable Debt

In 2007, the following procedure was agreed upon. However, the library director that requested the development left PINES before development was done, and the project was cancelled:

“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 [2007.09].”

At this time, each library system is responsible for developing its own procedures for handling old, 'unrecoverable' debt on patron accounts.

See Also:

Legal opinions regarding old debt, page 18+

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

[https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:bills:unrecoverable\\_debt](https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:bills:unrecoverable_debt)

Last update: **2018/10/11 16:15**

# Booking

The booking module was enabled with the 3.4 Evergreen upgrade in January 2020.

Libraries can currently configure two types of resources for reservations: rooms and projectors. To do this, the LocalAdmin will follow the steps below to set up the resources. After they are configured, circulation staff will be able to reserve them for staff or patron use.

If additional resource types are needed, please contact the Help Desk with your request.

## 1. Local Admin: Set Up Resources

1. Go to: Administration > Booking Administration > Resources
2. Click on New Resource
3. Example for a meeting room:
  1. Barcode: Create a unique name for the room (ARL-ATH-ROOM1)
  2. Deposit Amount: Leave blank unless you charge a room deposit
  3. Is Deposit Required: Leave blank unless you charge a room deposit
  4. Overbook: Leave blank
  5. Owning Library: Select the short policy name (ARL-ATH)
  6. Resource Type: Room
  7. User Fee: Leave blank unless you charge a user fee
4. Click Save

Record Editor: Resource

Barcode: ARL-ATH-ROOM1

Deposit Amount: Deposit Amount...

Is Deposit Required:

Overbook:

Owning Library: ARL-ATH

Resource ID:

Resource Type: ROOM

User Fee: User Fee...

Cancel Save

### Optional: Define Resource Attributes



This feature doesn't currently work correctly. See: <https://bugs.launchpad.net/evergreen/+bug/1807784>

Resource attributes can be defined if you want to be able to filter your list of resources - for example, if you had 10 meeting rooms, it might be helpful to be able to only show the rooms that could hold 50-80 people. However, if you only have two meeting rooms, it may be easier to identify them by name (Large Meeting Room, Small Meeting Room)

1. Set up resource attributes
  1. Administration > Booking Administration > Resource Attributes
  2. Click New Resource Attribute button
  3. Example for number of seats:
    1. Owning Library: Select the short policy name (ARL-ATH)
    2. Resource Attribute Name: Number of Seats
    3. Resource Type: Room
2. Set up Resource Attribute Values
  1. Administration > Booking Administration > Resource Attribute Values
  2. Click New Resource Attribute Value button
  3. Fill out form

1. Owing Library: Select the short policy name (ARL-ATH)
2. Resource Attribute: Number of Seats
3. Valid Value: 10
4. Repeat for each possible value
  1. If the different sizes of rooms can hold 5, 10, or 50 people, set up a Resource Attribute Value for each size. You may also enter more descriptive attributes such as "Up to 20" or "20 at tables - 50 in chairs."
3. Set up Resource Attribute Map
  1. Administration > Booking Administration > Resource Attribute Map
  2. Click New Resource Attribute Map button
  3. Fill out form
    1. Resource: Enter 'barcode' of resource (ARL-ATH-ROOM1)
    2. Resource Attribute: Number of Seats
    3. Attribute Value: 10
  4. Repeat until all resources have the appropriate values attached (ie, each room is associated with the proper number of seats).

## 2. Circulation Staff: Make Reservations

Patrons cannot reserve resources on their own, they must ask library staff to make a reservation on their behalf.

1. Click on Booking > Create Reservation
  - Or: Open a patron account > Other > Booking: Create Reservation

2. Choose Single Day Reservation
3. Choose a Reservation Date
4. On 'Choose resource by type' tab, search by type Room and the owning library
  - Or, use the 'Choose resource by barcode' tab to enter the barcode

Create Reservation

Reservation type: Single day reservation | Reservation date: 2020-01-31

**Reservation details**

Choose resource by type | Choose resource by barcode | Limit by attributes

Schedule settings

Search by resource type: ROOM | Owing library: ARL-ATH | + Descendants

< Previous day    **01/31/2020**    Next day >

Create Reservation 0 selected

#	Time	ARL-ATH-ROOM1
1	8:00 AM	
2	8:30 AM	
3	9:00 AM	
4	9:30 AM	
5	10:00 AM	
6	10:30 AM	

5. Double-click on the starting time slot (example: 10:00 AM)
6. Patron Barcode: Enter barcode
  - If creating reservation from a patron account, it should automatically fill in the patron barcode
7. Enter an End Time
8. Confirm Reservation Location
  - This defaults to the current location rather than to the resource's owning library
9. Click 'Confirm'

**Confirm Reservation Details** ✕

**Patron barcode**  📄  
TEST ACCOUNT

**Start time**  📅

**End time**  📅

**Reservation location**  ?

**Resource**  ⬆️ ⬇️ ⬆️

**Notify by email?**

Confirm reservation
Confirm and show patron reservations
Cancel





If you wish to add a descriptive note to a reservation, you can do so by editing the reservation from the Manage Reservations screen. This will allow you to include room requirements, additional contact information, etc.



If you are reserving a room for a member of the public who does not have a library card, you can reserve it with a staff card, and then edit the Notes field to add the person/group's details.

### 3. Circulation Staff: Manage Reservations

Every library that uses the booking module should check the reservations each morning to view reservations for the day.

1. Click on Booking > Manage Reservations
2. Verify that the correct Reservation Location is appearing
3. Double-click on a reservation to view the full details

Manage Reservations

Reservation location

+ Ancestors  
 + Descendants

**Filter reservations**

Filter by patron    Filter by resource    Filter by resource type

Resource type  Remove filter

0 selected ⌵ ⏪ ⏩ ⏴ ⏵ Rows 10 ⌵ ⚙️

#	Patron first name	Patron family name	Start Time	End Time	Resource Barcode	Resource Type	Reservation length	Reservation location	
<input type="checkbox"/>	1	TEST	ACCOUNT	01/31/2020 10:00	01/31/2020 12:30	ARL-ATH-ROOM1	ROOM	3 hours	Athens-Clarke Count...

### 4. View Reservations for a Patron

Staff can view a patron's reservations by opening the account and clicking on Other > Booking: Manage Reservations.

Manage Reservations

Reservation location

+ Ancestors  
 + Descendants

**Filter reservations**

Filter by patron    Filter by resource    Filter by resource type

Patron barcode  Remove filter

0 selected ⌵ ⏪ ⏩ ⏴ ⏵ Rows 10 ⌵ ⚙️

#	Patron first name	Patron family name	Start Time	End Time	Resource Barcode	Resource Type	Reservation length	Reservation location	
<input type="checkbox"/>	1	TEST	ACCOUNT	01/31/2020 10:00	01/31/2020 12:30	ARL-ATH-ROOM1	ROOM	3 hours	Athens-Clarke Count...

## Notes

The Booking Module is currently undergoing additional development. More information on the progress and ideas for future work can be found on the [Evergreen Student Success Working Group](#) site.

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:booking>

Last update: **2021/02/25 12:19**

# Curbside Pickup Module

## Enabling Curbside Pickup

Curbside pickup functionality was added with the 3.6.1 upgrade in January, 2021. Usage of this module is optional and can be enabled either at the branch level or the system level. To enable the functionality, submit a [Help Desk](#) ticket with the following information:

1. The Library System or Branch to enable it for
2. The maximum number of possible pickups per pickup time slot
3. The duration of the pickup time slots (15 minutes, 30 minutes, 1 hour, etc.)

## Assumptions

Curbside pickup assumes a few things.

1. Curbside pickup has been enabled for the library system or branch.
2. A staff member must be assigned to monitor the appointments for the day.
3. The library's hold shelf in PINES must agree with what is on the physical holds shelf.
4. You have a work table / area set up to place the items that should be picked up in the next time slots.
5. Only items that are placed on hold and ready for pickup are available for appointments and checkouts through the curbside pickup module.
6. It also assumes that patrons with appointments will have their items checked out from the Curbside interface, and not from the standard checkout interface. If a patron has a Curbside appointment, but decides to come in and check out from the desk or from a self-check machine, this can lead to an "empty" appointment in the Curbside interface. This will not hurt anything, but it may be confusing.

## Workflow

### Video demonstration of curbside pickup

Open "Curbside Pickup" by clicking on the circulation menu. Go to the bottom of the menu to find it. (If you cannot see the full menu, you may need to scroll down or press the Ctrl key and the "-" (minus) key to zoom out. If you do this, you can use Ctrl and + (plus) to zoom back in.)

There are 5 tabs on the curbside window:

1. To Be Staged
2. Staged and Ready
3. Patron Is Outside

4. Delivered Today
5. Schedule Pickup

## 1. Schedule a Pickup

Currently, a pickup must be scheduled by phone. When a hold is ready to be picked up, an email notification will be sent to the patron's address on file informing them that curbside pickup is available for your location and they can call to set up an appointment. (The phone number included in the message will be the main phone number that is set in the PINES database.) Please note that the emails are sent from the server in batches, so it may take up to an hour for the email to be sent out. If the location is *only* doing curbside pickup, then staff may need to call those patrons who have not yet called in.

When you are speaking to the patron, open the "Schedule Pickup" tab and enter the patron barcode number. After entering the patron card number, the patron name will display along with the number of holds available for that patron at your location.

Click the "Make New Appointment" to select an appointment date and then time slot. The number beside the time shows the remaining appointments for that time slot. Appointments can only be scheduled during normal operating hours. There is also a box for notes should any need to be entered - for instance, you may want to enter a description of the car / license plate number so that the patron will not have to call in when they arrive. Click the "Save" button. The appointment has now been scheduled. A confirmation will be displayed in the bottom right corner of the screen.

An email confirmation will automatically be sent to the patron's email address on file.



Development is currently under way to add appointment-scheduling functionality to the OPAC so that patrons will be able to schedule appointments without calling the library, but this functionality is not yet available.

## 2. Retrieve Items

Open the "To Be Staged" tab to retrieve the holds needed to fill the appointments in the next ten time slots. (If your time slots are set to 15 minutes, you will only see a list of holds for the next 2 1/2 hours - if your time slots are set to 1 hour, you will see holds to retrieve for the next ten hours.)

Retrieve the listed items, and place them in your curbside pickup work area. Then select them on the list and click "Mark Staged and Ready for Pickup."

The Staged and Ready tab shows which holds have already been placed in the curbside area and are ready for pickup.



If more than one staff member is working on curbside pickups the staff members can "claim" the patron to prevent others from trying to pull the same items. Click on the "Claim" button to claim that patron's pickup.

### 3. Mark Patron Arrival (Optional)

Depending on your library's setup, you may want your patrons to call in when they arrive and your curbside pickup staff person may not be the person who answers the phone. If this is the case, whoever answers the phone can go to the Staged and Ready tab and click "Mark as Patron Arrived."

The curbside pickup interface will refresh itself every 15 minutes, but can be updated more quickly by refreshing the browser page. So, if the curbside pickup staff person is in a different area than the staff person answering the phone, the curbside pickup person may want to refresh the browser page more frequently to see which patron has pulled up and called in.

If the curbside pickup staff person is also receiving the phone call or has another way of knowing which patron has pulled up, then the "Mark as Patron Arrived" action is not required.

### 4. Check Items Out

If your local workflow is to mark patrons as arrived (see step 3, above), then the Patron is Outside tab will show you which patrons are waiting outside. If you are using this function, select the items for the patron and click "Checkout Items and Mark as Delivered."

If you are *not* using the mark patrons as arrived function, you can check items out to a waiting patron by going to the Staged and Ready tab, then selecting the items and clicking "Checkout Items and Mark as Delivered."

Items should not be checked out to the patron until the patron has arrived.

### 5. Deliver the Items

Deliver the items to the waiting patron.

The Delivered Today tab will show which patrons and items were picked up via curbside today.

## Rescheduling

To reschedule an existing pickup appointment, go to the Schedule Pickup tab and enter the patron barcode. The patron's existing appointment should appear and be editable.



Development is currently underway to allow patrons to see their appointments and reschedule them through the OPAC themselves, but is not yet available.

## More Information

More detailed information is available in the Evergreen software documentation at:  
[https://docs.evergreen-ils.org/eg/docs/latest/circulation/curbside\\_pickup.html](https://docs.evergreen-ils.org/eg/docs/latest/circulation/curbside_pickup.html)

Video demonstration at: <https://my.nicheacademy.com/pines/course/24107>

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:curbside>

Last update: **2021/03/09 11:27**

# Freedom of Information Act (FOIA) Requests

## Patron Requests for Information

Patron requests for information will be forwarded to the patron home library or the library associated with the information request. PINES is the custodian of the consortium resources (ILS) and not the individual transactions of a library system. It will be the responsibility of the library or library system to provide responses to patron requests for information. If the library or system needs assistance in providing responses to information requests, we will assist library staff through our established helpdesk paradigm.

## Freedom of Information Act (FOIA) Requests

FOIA requests should be directed to the Board of Regents FOIA officer Brook Bowen. See also the Board of Regents information page: <https://www.usg.edu/openrecords/>

Contact info:

Brooke Bowen, Legal Counsel

Open Records Officer

Office of Legal Affairs

University System of Georgia

270 Washington Street, S.W.

Atlanta, GA 30334

Em: [openrecords@usg.edu](mailto:openrecords@usg.edu)

Ph: 404-962-3255

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:foia>

Last update: **2019/09/11 11:49**

# Automated Notifications

PINES generates automated notices for a number of reasons and sends various notices by email, SMS text (a form of email that gets translated to text message by the recipient's phone service provider), and for display in the Patron Message Center. The text of each type of notice is available here:

The automated notices include:

- 10 Day Overdue Email Notification
- 10 Day Overdue Notice in PMC
- 3 Day Courtesy Notice (by Email)
- 3 Day Courtesy Notice by SMS
- 3 Day Courtesy Notice in PMC
- 30 Day Account Expiration Courtesy Notice
- 6 Month Long Overdue Notice (Email)
- 6 Month Long Overdue Notice in PMC
- Fine Limit Exceeded
- Hold Cancelled (Shelf-Expired) Email Notification
- Hold Cancelled (Shelf-Expired) User Message (PMC)
- Hold Ready for Pickup Email Notification
- Hold Ready for Pickup PMC Notification
- Hold Ready for Pickup SMS Notification
- Item Lost and Billed Email Notification
- Item Lost and Billed PMC Notification
- New User Created Welcome Notice
- Password Reset Request Notification
- SMS Call Number

See also: [Wording of Automated Notices](#)

In addition, PINES contracts with a vendor for the following:

- 10 day overdue notice (Email attempt first, phone call if email fails, USPS mail if both email and phone fail)
- 30 day overdue letter sent by USPS

Letters that cannot be delivered are returned to the patron's home library. The library should mark those patrons' addresses invalid when this occurs.

## Typical Notifications for an Overdue Item

1. 3 Day Courtesy Notice sent 3 days prior to due date by email (if available) and SMS text (if available), and entered into Patron Message Center.
2. 10 Day Overdue Notice sent by email (if available) and entered into Patron Message Center. Vendor also telephones patrons who do not have a valid email recorded in PINES, and if they cannot be



reached by phone then vendor sends a letter.

3. 30 Day Overdue letter sent by vendor.
4. 6 Month Long Overdue Notice sent by email (if available) and entered into Patron Message Center.
5. Fine Limit Exceeded is emailed when a patron reaches their fine limit (usually \$10.00). This can be for any type of fines and fees.

## Pre-Overdue Notices ("Preminders")

PINES sends a "pre-overdue" or "prereminder" courtesy notice via email 3-days prior to the due date of an item [2007.05]. Beginning January 2017, PINES also began sending pre reminders via SMS text service.

Patrons should be aware that although PINES sends pre reminders, it is a courtesy only. Some email and SMS text providers may block the reminder 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 pre reminders are received.

## 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.

The first overdue notice is generated at 10 days past the due date of an item. These 10-day overdue notices are sent via email to those patrons with email addresses in their user records [2007.02], and patrons without email addresses are telephoned (via a telephone notice service that PINES contracts with) [2011.05].

The final (30-day) overdue notice is sent via US Mail.

Historical 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].

## Sending / Bounceback Address

Although the automated notifications get sent from the PINES server, they are configured to appear that they come from the patron's home library. This reinforces consistency to the patron regarding their home library is and who they should contact for questions, payments, renewals, etc.

The email address used as the sending address can be the same address as the library's main contact email address, it can be a generic address that multiple staff have access to, or it can be the email

address of the branch manager or circulation manager. If no email address is set up in the “Sending email address for patron notices” library setting, then the emails will be sent from the branch contact email address. Libraries cannot remove all contact email addresses [2020.09].

The staff member(s) that monitors the email address should make note of “bouncebacks” (aka, undelivered mail notices) and update the associated patron accounts by marking their email addresses invalid on the Patron Edit screen.

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:notifications>

Last update: **2020/09/22 11:31**

# Legal Resources

## Georgia Library Law

- [Library Law Handbook: A Handbook for Public Librarians in Georgia \(Marti Minor, 2018\)](#)
- [Georgia Code pertaining to libraries](#)
- [Marti Minor's Legal Column](#)
- [Marti Minors Library Presentation Documents](#)

## Selected Presentations and Documents

Library Law Q&A (Marti Minor, Public Library Directors Meeting, Fall 2020)

- COVID-19 Issues and Leave Time
- Effect of Bankruptcy on Library Accounts
- Library as Host of Virtual Events

Anonymity for Library Users: Balancing Legal Obligations (Marti Minor, Public Library Directors Meeting, Fall 2019)

### **Library Law Salad (Marti Minor, Public Library Directors Meeting, Spring 2017)**

- Library Law Salad: Legal Update for Georgia Public Library Directors
  - Legal Matters in Georgia Public Libraries: An Update for Directors
- Topics include Georgia's Gun Law, Bathroom Legislation

### **Patron Conduct (Marti Minor, Public Library Directors Meeting, Winter 2016)**

- Managing Patron Behavior without Abridging Legal Rights
  - Policies for Patron Conduct

### **Case Studies: Library Law in Georgia (Marti Minor, Public Library Directors Meeting, Fall 2014)**

1. In light of Georgia's more permissive gun carry law that now includes government buildings, what type of policy(if any)should public libraries enact regarding gun possession inside the library building?
2. How does Georgia's Health Care Freedom and ACA Non-Compliance Act apply to public libraries?
3. Is it advisable to extend borrowing privileges to institutional patrons? What are the contract and collection implications?
4. Are e-cigarettes prohibited in public buildings under state law? If not, may the public library prohibit the use of e-cigarettes inside?
5. What are a public library's duties to maintaining electronic records for purposes of open records

requests?

6. May a public library enter into a joint venture with another non-profit entity involving value-added services for which a fee will be charged?
7. Mandatory Child Abuse Reporting: What training is required for young volunteers or short-term volunteers?
8. What is the applicability of Georgia's Open Meetings Law to Friends Groups? What concerns would a Friends Group have in hosting meeting of local legislative authorities?
9. Are library workers required to request parental permission prior to taking photos that include children participating in library events?
10. Sharing patron info between libraries: What type of patron information may a public library provide to other libraries? Is it permissible to give name, address & phone numbers?

### **Legal Questions from Georgia Librarians Part II (Marti Minor, Public Library Directors Meeting, 2013)**

1. Can/should a public library prohibit a patron from distributing religious materials to other patrons and library staff?
2. What duty/right does a librarian have to monitor the materials used and borrowed by minors?
3. Are there nepotism or conflict of interest concerns when members of a hiring committee are related to public library job applicants?
4. Can a public library require employees to be paid via direct bank deposit?
5. How may a library, as an employer, force someone to retire without facing an age discrimination suit?
6. What level of background check should a public library do with regard to job applicants?
7. What are the options of a library as employer when an employee is often absent from work because of health problems but refuses to discuss her intentions with regard to maintaining her employment?
8. For purposes of applying for grants, how can a public library prove its non-profit status?
9. What is a public library's responsibility when asked to provide access to its security camera video?
10. What are the options for a library when a disgruntled patron photographs an employee and threatens to post the photo and describe the employee as rude and abusive (even when the employee has remained polite and appropriate in all dealings with the patron)?

### **Legal Questions from Georgia Librarians: Ten Case Studies (Marti Minor, Public Library Directors Meeting, 2013)**

1. In the context of discipline and safety issues, when, if ever, can a library staff member touch a child who is not being supervised by a parent?
2. How much help can a librarian legally provide to a patron who is filling out an official form or document?
3. A patron who has ADHD has requested the public library provide a private room in which to read to allow her to concentrate. What is required of the library?
4. Whom may the library properly classify as independent contractors?
5. What are the FLSA implications of a non-exempt library staff member volunteering to work with or become a paying member of the Friends of the Library?
6. May the library deduct fines and lost material fees from an employee's paycheck?
7. How does an employer administer FMLA leave when an employee has accrued leave and is receiving short term disability?

8. Does a power of attorney give the holder access to a library users circulation records?
9. What are the considerations for a public library in establishing or removing an area for free informational materials?
10. Is it discriminatory to be closed on holidays associated with Christianity while open on holidays associated with other religions?

### **Legal Issues in Georgia Public Libraries (Marti Minor, Public Library Directors Meeting, May 2010)**

- Access Issues
- Use of Library Policies to Manage Problem Behavior by Patrons
- Debt Collection by Public Libraries
- Employment Issues
- General Liability Issues
- Board of Trustees and Friends of the Library

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:legal>

Last update: **2020/10/12 12:57**

# Record and Data Retention

## Patron Record Retention

Updated on 09/03/2014:

The legal department of the Board of Regents has indicated that public libraries are not mandated to follow the USG data retention schedule for “Courtesy Borrowers Records” (a.k.a library patron applications). Libraries should develop their own policies in accordance with the Secretary of State policy for voter registration (that takes place with library applications and updates). Whether you record that electronically or with paper forms is up to the library system. Please keep yourself informed of the Secretary of State's policy by checking their website at [http://sos.ga.gov/index.php/Elections/election\\_connection](http://sos.ga.gov/index.php/Elections/election_connection). (See link for Public Libraries.)

As references in developing a record retention plan for a library system, you may also wish to consider:

- [Georgia Records Act](#)
- [Local Government Retention Schedules](#)
- [Record Retention \(Slides, Ben Carter, Public Library Directors Meeting, Fall 2020\)](#)

## Circulation and Hold Data Retention

With a few exceptions, circulation and hold data that has been resolved/closed is archived by the system after one year. Archiving this data does not affect statistical reporting, such as total number of circulations per item, circulation staff, circulation workstation, and circulating library.

Circulation data with outstanding fines or fees, including Lost and Long Overdue, is retained. Circulation information is also retained for those patrons that opt to have the system store their circulation history.

However, when looking at the “Show Last Few Circulations” item screen or the “Show Cancelled Holds” patron screen, data older than a year is not displayed.

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:retention>

Last update: **2020/10/09 18:15**

# Volunteers in the Library

The library has an obligation to protect the confidentiality of patron and circulation records and would be liable for any exposure of those records whether it be via paid employee or volunteer. Policy decisions as to which staff will have access to the records must be made with great care.

As there is no reliable enforcement mechanism for ensuring this confidentiality for volunteers like there is with employees, the PINES Executive Committee has endorsed a policy that does not allow volunteers to access any of the staff functions of the PINES system. [2020.12]

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:volunteers>

Last update: **2020/12/07 17:05**

# Library Cards

## Library Card Design

Any new card designs for PINES must be approved by the PINES Director, the PINES Communications Department, and the State Librarian [2016.12].

## Library Card Orders

Library cards are purchased directly by each library system. Libraries may use any vendor as long as the card design, barcode format, and numbering sequence are consistent with PINES standards.

See also: [Library Card and Barcode Ordering Information and Patron Card Sequences](#)

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

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# Library Names, IDs, Codes, and Contacts

The Library Contact Info spreadsheet that is attached below includes addresses, phone numbers, email addresses, as well as library shortnames and library database IDs (for use in search codes).

- [library-contacts-6-18-2021.xlsx](#)
- See Also: [Courier Labels and Courier Codes](#)

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