



Circulation Procedure Manual



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INTRODUCTION AND OVERVIEW

This manual was compiled to assist MAIN (Morris Automated Information Network) Inc. member libraries in following consistent procedures when circulating materials and maintaining the patron database in accordance with the policies established by MAIN, Inc.

The information is meant to provide guidelines for the circulation staff on basic policies and best practices. These procedures are recommended by the Circulation Committee to ensure uniformity within MAIN. A list of the [Circulation Committee](#) members is available on the MAIN staff website.

Check the [MAIN staff website](#) for related circulation information and resources, as well as all [CircTips](#) and [LEAP Tips](#) referred to in this document.

Links can be found throughout the document for ease of access to supporting information on the MAIN website or within this document. It is suggested that this document be accessible from the desktop of Circulation computers so information is handily available when questions arise.

Other documents to be referenced on the MAIN staff website include: the [MAIN, Inc. Membership Agreement](#); the [MAIN Policy Manual](#) for additional information on established policies that govern the interactions between member libraries; and a list of the [MAIN Libraries Hours](#).

Please address any suggestions for future changes in this manual to the Circulation Committee.

PATRON REGISTRATION PROCESSING

GENERAL INFORMATION

All Patrons must have a current library card with a barcode. This card must be presented at all times when borrowing materials. Scanners at some libraries can read a barcode image on a smart phone which is acceptable.

Each library should develop a **standard application form** that conforms to the patron registration screen. Registrations must be taken at the patron's home library for the Patron card with full privileges. See the section on [restricted memberships](#) for more details on other types of registrations. A [sample registration form](#) may be found in the Appendix.

Before registering a patron, check to make sure the patron does not already have a card in the system. To help prevent duplicate entries, ask the patron if they ever had a library card and staff can determine if it was at a MAIN library. Also, search by last name, and/or current and former addresses. Ask the patron if they ever registered under a different last name.

There is one exception to the "one registration" rule that applies to dependents that live in multiple towns. See the section on [Dependents Living in Multiple Towns](#) for details.

If there is an existing record, do not create a new one but rather change the following fields: enter the current barcode in the former barcode field; in the **barcode field** scan the new barcode; update the **address, phone** and **email** fields; select your library in the **Registered At** and **Statistical Class** fields; update **expiration date** and **address check** fields. **Notify the previous home library.**

Patron's PIN must be set up at the time of registration. The PIN allows the patron to log into the "My Account" function of the online card catalog (PAC). PINs are not visible in LEAP and if patron does not remember his or her PIN, staff must enter a new PIN or if there is an email address in the patron registration record, they can select an option in the PAC for the PIN to be emailed to them.

If a duplicate registration is created in error, correct it using the merge function as outlined in the LEAP Tip titled [Merging a Patron Record](#). This requires the CircSup sign-on.

PATRON REGISTRATION PROCESSING

PATRON MEMBERSHIP

The types of patron memberships are described in the following paragraphs. In the appendix you will find a chart of the [Patron Code Usage and Privilege List](#).

A **patron should only be registered once in the system**. The only exception to this is for [dependents living in multiple towns](#). Before creating a patron record, search the patron records to be sure that a record does not already exist for the patron. For example, a patron may have a Courtesy Card from the town they work in and be eligible for a MUF card as well. In this case keep the Courtesy Registration and add a comment in the Local Library use field that they are eligible for MUF privileges.

FULL-SERVICE PATRON (full)

Verify proof of residency (tax municipality) by obtaining a **driver's license, state of New Jersey-issued identification card**, or alternative proof of address. The following documentation may be used to prove residency: **current utility bill or lease, current tax statement or current bank statement**. You may also find the [County of Morris Tax Records](#) online search resource helpful in determining residency. Library staff members qualify for a full service library card, irrespective of where they live.

The selected **Patron Code** should be **Patron**. The **expiration for a full-service** card is **three years**. The expiration and address check fields will automatically be filled in when creating a new registration. If you know they will have a limited residency, you can set the expiration for less than three years. Some local libraries may choose to renew their own patrons for longer amounts of time at their discretion.

A patron's mailing address does not always reflect where their taxes are paid. To avoid confusion in these cases, enter **"PAYS TAXES TO xxx"** in the **Local Library Use** field.

DEPENDENTS LIVING IN MULTIPLE TOWNS (full)

In the case of an underage library users who has separate parents/guardians, both, whom reside at different residences within MAIN municipalities, but are not able to work in concert with the other parent/guardian in managing the juvenile's library card, it is acceptable to have two registration records for the child. This is referred to as the Juvenile Duplicate Library Card Exception and is to be identified in the system as follows:

1. Add "JUVENILE DUPLICATE EXCEPTION" in the "Block" field of the patron record.
2. Select "DUP" in the title field.
3. Notify the other library where the juvenile patron holds their original library card so they can add these same changes to the record they had created.

PATRON REGISTRATION PROCESSING

MAIN-PAY SERVICE (full)

Any patron outside the MAIN-service area may purchase a library card for \$250 (\$225 for patrons ages 65 and older) per year, per person. This card entitles the patron to full borrowing privileges at every MAIN library. The library issuing the card keeps the collected fee. The fee is non-refundable, even if the person moves out of the area or to a MAIN-service town.

These patrons should present identification, complete a registration card, and be entered with a patron code of **MAIN-Pay** and an **expiration of one year**. The patron is issued a **normal library card with a special sticker** (with the MAIN logo) affixed to the card. The stickers are distributed by the MAIN office and should never be removed from the card. Please note that the stickers' adhesive is most effective when they have been placed on the cards at least 72 hours prior to handing them to a patron.

User privileges (expiration date) should only be updated when the patron is purchasing a membership for another year. If the payment is made before the expiration date, add one year onto the current expiration date. If the payment is made after the expiration date, set the expiration date for one year from the date they paid. If the purchase is being made at a different MAIN library, issue a new library card and modify the patron record accordingly to show the new home library (similar to when a patron moves to another MAIN town). See the Appendix for detailed [Pay Service procedures](#) and [Pay Service Agreement Form](#).

K-12 (full)

K-12 students and teachers who attend school in or work at a municipality served by a MAIN library and do not live in a municipality served by a MAIN library, are entitled to a full service library card that can be used at every MAIN library. If the student or teacher lives in a municipality served by a MAIN library, they should obtain a library card where they live. Use a patron code of **K-12** and an **expiration period of one year or less** when registering these patrons.

COURTESY SERVICE (restricted)

An individual who **works in a member library's town** but who **does not reside in a community served by a MAIN member library**, and who is **not eligible for [Open Borrowing](#)**, may be eligible for a courtesy card. Courtesy service patrons may borrow materials over the counter at the issuing library and Morris County Library only. They may place holds for pick-up at either MCL or the issuing library, but other libraries reserve the right to limit items sent for courtesy service patrons.

The patron must present **current proof of employment in the member library town**. The issuing library will register the patron with a **Courtesy-xxx patron code** using a standard card for their library but identified as Courtesy with the traditional yellow sticker. The patron signs the [Courtesy Agreement Form](#). Individual libraries may choose to have the patron complete their

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standard registration form as well (perhaps in place of the bottom portion of the Courtesy Agreement Form.) See Appendix for [detailed registration instructions](#).

Bernards Township Library uses a standard card that is identified by a hole-punch and red sticker; these courtesy card patrons are limited to using the Bernards Township Library.

Courtesy patrons should be entered with an **expiration period of one year**.

MORRIS COUNTY LIBRARY (restricted)

The Morris County Library issues library cards to individuals who live in Morris County but do not live in a community served by another MAIN member Library (i.e. Boonton Twp., Mine Hill, Netcong, and Victory Gardens). This card can only be used at Morris County Library. Patrons may request materials through the patron online request system for pick-up at Morris County Library; however, member libraries may restrict the items they will loan to Morris County Library cardholders. The patron record is identified with a Patron Code: of Boonton Township, Mine Hill, Netcong, or Victory Gardens.

COLLEGE STUDENT (restricted)

Libraries may issue a card to students attending an institution of higher learning in their municipalities, but who have a permanent address outside of the MAIN member municipalities and outside any that participate in the [Open Borrowing](#) program. It is recommended that libraries obtain proof of current enrollment at the school. These students are eligible for in-person service at any MAIN library, but may not request materials through the request system. A patron code of **College Student** should be used and an **expiration period of one year or less**.

INTERIM (restricted)

Individuals eligible for a full-service card at a MAIN member library who have not yet registered at their home library may be issued an interim membership to facilitate immediate loaning, one-time only. The patron and staff should complete the [Interim MAIN Membership](#) form found in the appendix. The completed form is to be given to the patron to bring with them to their home library within 30 days. The issuing library may make a copy of the form for their records. The patron should be directed to go to their home library within one month for the issuing of the proper full-service card. Individuals eligible for a Morris County Library Card are not eligible for an Interim Membership. Enter the registration specifying **registered at** as your library, a patron code of **Interim**, and an **expiration period of 30 days**.

TEMPORARY (restricted)

Individuals residing temporarily at a facility such as a hospital, rehabilitation center, or shelter located within a MAIN member library's service area, may be eligible for a temporary card. Patrons with a temporary card are eligible for in-person service at the issuing library only. They may not request materials through the patron online request system; however, library staff may

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place holds on their behalf. A patron code of **Temporary** should be entered with an **expiration period of three months**.

MORRIS UNION FEDERATION (MUF) (restricted)

The following libraries: Berkeley Heights, Bernardsville, New Providence, and Summit are entitled to reciprocal borrowing at the following MAIN libraries only: Bernards Township, Chatham, Madison, Morristown/ Morris Twp, and Long Hill Twp. To ensure accurate circulation statistics, be sure to select **Morris Union Federation (MUF) as the Patron Code** and enter the **Statistical Class** for the correct library.

OPEN BORROWING (restricted)

Open borrowing provides patrons from participating libraries outside of MAIN with walk-in only borrowing privileges at any MAIN library. Participating library consortia include PALS+, LMxAC and SWELL. A complete list of [participating libraries](#) can be found on the [Open Borrowing website](#). Complete details on the operation of the program are available at the [Open Borrowing for Librarians](#) section.

Patrons that have been cleared for Open Borrowing by their home library will have a green Open Borrowing sticker on their card. With or without the sticker, it is recommended that you call their home library prior to registering or checking out materials to verify that they are currently in good standing. Follow these guidelines to create a patron record:

1. They must present their library card from their home library with a green Open Borrowing sticker and identification. If there is no green sticker, you may call their home library.
2. Scan the barcode and search by name to verify if they already have a patron record in MAIN.
3. If so, do not create another patron record.
4. If they do not have an existing patron record, verify they live in the municipality of a [participating library](#). It is recommended that you call their home library to verify they are currently in good standing (even if they have the green sticker).
5. To create the patron registration:
 - a. use the barcode from their home library
 - b. select Open Borrower for Patron Code
 - c. enter name and address as usual
 - d. select a term of 1 year for Expiration and Address Check
 - e. Select their home library or consortium in the Statistical Class

If a patron of MAIN would like have walk-in privileges at participating Open Borrowing libraries, check that they are currently in good standing and affix the green Open Borrower sticker to their card. Each library is responsible for obtaining its own stickers.

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ORGANIZATION-SCHOOL (restricted)

Library institutions which are defined with a patron registration should be created with a Patron Code of **Organization-School**. These registrations are used to charge out items that are being lent through Inter-Library Loan, or for schools and institutions such as nursing homes and day care centers. Holds cannot be placed by those with this patron code.

PAC SELF-REGISTRATION (restricted)

Patrons can self-register online from the PAC (Public Access Catalog) so Hold Requests can be placed on items in the catalog. The patron code is **Online Registrant**. These records are created with a barcode that begins with PACREG and expire in 30 days if not validated with the presentation of a valid proof of residency at the home library Circulation Desk. Online registrations that have not been validated will be purged after 30 days. Patrons cannot access the online databases with the PACREG library membership and are limited to placing 5 holds.

The Circ-xxx email account will receive a notification when a PAC self-registration has been created. When you are notified of a PAC Self-Registration, it is recommended that you:

1. Verify that the entered patron address is served by your library. If the registration belongs to another MAIN library, forward the email to the appropriate library and notify the patron.
2. Search for patron records with the same last name to determine if the patron already exists.
3. If it is an existing patron, either merge the registrations (LEAP Tip: [Merging a Patron Record](#)); or if no holds have been placed, you may choose to delete the Online Registration record. You may want to call the patron to explain.
4. If it is not a duplicate and the address appears valid for your library, you can choose to:
 - a. Prepare a card for when they come to the desk with ID and once ID is presented change the patron status to Patron and enter a valid barcode. Do not mail a library card to the patron; they must present ID at the desk first.
 - b. Wait until they come to the desk with ID to enter a valid barcode and change the record to Patron status.

DATA ENTRY STANDARDS

To insure database uniformity, all libraries are expected to conform to the following:

- **All patron information** should be entered into the database using **capital letters**. Please do not use punctuation.
- **Email addresses** can be entered in upper, lower or mixed case as preferred by home library. When an **Alt Email** is entered, notices are sent to both addresses so you probably don't want the same email in both fields.
- **Patron name** should be entered without any punctuation with the exception of a hyphenated last name (e.g. SMITH-JONES). If a common name is used in addition to a legal name, enter it in parentheses in the first name field (e.g. "EUN HO (ELIZABETH)").

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- **Patron address** should follow standard post office abbreviations, omitting punctuation (i.e. periods at the end of shortened words).

For a complete list of abbreviations, visit http://pe.usps.gov/text/pub28/28apc_002.htm

Street Suffixes

Avenue	AVE	Mount	MT
Boulevard	BLVD	Mountain	MTN
Circle	CIR	Parkway	PKWY
Court	CT	Place	PL
Crescent	CRES	Road	RD
Drive	DR	Street	ST
Highway	HWY	Square	SQ
Junction	JCT	Terrace	TER
Lane	LN	Turnpike	TPKE
		Way	WAY

Secondary Units

Apartment	APT	Suite	STE
Building	BLDG	Unit	UNIT
Floor	FL		

- To add a **title or suffix**, use designated drop down menu (title) and free text box (suffix) on registration screen.
- **Apartment number** should appear on same line as street address.
- If a PO Box is used for mail, record a **second address entry** for the actual home address. Use the Type drop down to specify Primary on the PO Box entry and Home on the street address and specify Primary in the notices address drop down.
- **Phone numbers** should follow the following format: 973-567-8901. Please do not use any letters or words in this field. **Remember to include hyphens!** When specifying notification by phone, a leading 1 should be included for out-of-state numbers (e.g. 1-234-567-8901). Do not enter a leading 1 in a phone field (e.g. Phone 2) that is selected for "Txt Messaging" notification. The New Jersey area codes are: 201, 551, 609, 640, 732, 848, 856, 862, 908, 973. Since not all phone numbers are entered per this standard, you can search by phone number using three wildcard asterisks (*234*567*8901). If patron does not want to be notified, **specify notification method** as "Mailing Address" instead of "None", since the latter results in no overdue notices and bills ever being generated.
- Including **additional information** such as driver's license number is not a recommended practice. For assistance to have driver's license numbers removed from your patron records, [open a ticket with MAIN](#).
- If local notes are required, use "**Local Library Use**" box and type in all caps. When the note becomes out-of-date, please be sure to remove.
- **Statistical Class** is a required field on the Patron Registration record.
- Use the **Authorized to Pickup My Holds** field to identify individuals approved by the patron to check-out held materials on their behalf.

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PROCEDURE FOR UPDATING USER PRIVILEGES

When updating a patron's library card, they must present their library card and proper identification such as a driver's license or state issued non-driver's license. **Verify** that the information in the system is correct and **update privileges according to the [Patron Code List](#) in the appendix**. If the address information is unchanged, patron privileges can be updated at any MAIN library with the exception of MUF Patrons who can only be updated at a MUF library.

If changes are made to the email or phone number, email details of the change to the home library.

If the patron has moved within the same municipality, call the home library to verify that the new address is also part of their municipality. Then, update the address and be sure to renew the registration in LEAP. Email the details of the change to the home library.

If the patron has moved to a different municipality, he or she must go to the new home library and get a card. If the patron is uncertain of their appropriate home library, give the library phone number to the patron so they can call and verify.

PIN, email address or phone number changes can be made by any member library provided the patron presents their library card and a valid ID.

Patrons with email and/or text are sent a notice 14 days before their privileges are to expire. They are instructed to renew at any MAIN library where they have borrowing privileges.

User privileges for a MAIN-Pay card should only be updated when the patron is purchasing a membership for another year. If the payment is made before the expiration date, add one year onto the current expiration date. If the payment is made after the expiration date, set the expiration date for one year from the date they paid. If the purchase is being made at a different MAIN library, issue a new library card and modify the patron record accordingly to show the new home library (similar to when a patron moves to another MAIN town).

PROCEDURE FOR RE-ENTERING DELETED REGISTRATIONS

If a patron (from another library) comes to the desk with a library card that is no longer in the system, ask for **proper ID**. If they **still reside in the same municipality, call the home library to verify residency**. **If the home library is closed, refer to the [County of Morris Tax Records](#) online search resource**. **Once the address is verified, register the patron in the system**. **It is imperative that you email details to the home library since the patron's registered library information will have to be corrected by them**.

USING PATRON ASSOCIATIONS

This feature allows you to associate patron records of a family group within LEAP to make it easy to navigate from the status record of one family member to another. Additionally, this feature can be used to allow one family member to check out an item on hold for another family

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(it is recommended that you establish prior approval for “allowed to pick up holds.” The use of this feature does not result in a patron being blocked due to delinquency of another member of the association. Permission to use this feature must be requested from the MAIN office for a specific user name (e.g. circsup-xxx) at your library.

READING HISTORY

This feature can be turned on for each patron and will maintain a list of items checked out on a patron’s card. It can be viewed by the patron in the PAC or in the Reader Services view of the Patron Status screen in the client.

Rather than turning on this feature through LEAP, it is recommended that a patron turn on reading history in the PAC. There is a check box located near the bottom of the “Contact Information and Preferences” section of the “My Record” window. Upon checking the box, the patron will be prompted to accept that collected information could be disclosed law enforcement in the event that the library is presented with a subpoena or court order. A suggestion is for staff to work through the process with those needing assistance, but to allow the patron to read and accept the message. The collected information is not under surveillance by law enforcements agents.

PATRONS MOVING BETWEEN MAIN MUNICIPALITIES

When an existing MAIN patron has moved to an area served by a different library, their existing record should be modified as follows. You can also refer to the Tip [How to Update a Patron Record to a New Home Library](#).

DO NOT CREATE A NEW PATRON RECORD IF ONE ALREADY EXISTS.

1. Copy the current **Barcode** into the **Former barcode** field on the registration record.
2. Overwrite the **Barcode** with the one for the new home library.
3. Modify **Registered At** to the new home library
4. Edit the home **Address** to the patron’s new address.
5. Edit the **Telephone and Email** information as necessary.
6. Change the **Statistical Class** to the new home library.
7. **Notify the previous home library** that the patron has moved. Collect the old card and either destroy or return to the previous library

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LENDING

Each library determines its own lending policies in compliance with the current [MAIN, Inc. Membership Agreement](#) and the [MAIN Policy Manual](#). There is a system imposed limit of 100 items checked out per patron.

FINES

Fines are **charged as specified in the item record**. Be aware that not all items are defined with a grace period. A **grace period** is an extra courtesy and should not be expected by patrons. Patrons with **finer or fees greater than \$5.00 are blocked** from borrowing additional items.

For all items, the overdue **fine policy of the owning library prevails**, regardless of the fine policy in effect at the transacting library. The library where an overdue fine is collected keeps the fine money. **Do not waive fines for other MAIN library items** borrowed by your patron. Items with fines of **\$1.00 or more per day should be prominently labeled** as such as a courtesy to patrons who may be accustomed to the .10 fine assessed by some libraries. **Estimated fines** for overdue items can be displayed in LEAP; however, these fines should not be collected until added into the actual fines when the item is returned or renewed. A patron can also view their estimated fines in the PAC. If using the **Daily Cash Drawer** report to reconcile your cash drawer, you must accurately mark fines/fees as paid or waived.

USE OF PATRON NOTE FIELDS

Blocking notes should be entered only when an important action is required by the patron since a blocking note prohibits their ability to borrow downloadable books. Situations that would warrant a blocking note include an item that is lost or damaged, information related to outstanding charges or the need for a new registration due to a move to a different municipality. Be sure to remove the note once the issue is resolved. If another library has placed a blocking note on your patron's record and the note is no longer necessary, contact the library and ask for the note to be removed.

It is recommended to enter **blocking notes** on the Patron Record so the staff can easily read the notes. The note will appear as a pop-up before patron circulation activity.

1. Open the **Patron Status** window and select the **General** icon on the left.
2. Select either **Library assigned** or **Free Text** blocking note
3. When entering a note it is important to include your library code, the date and the initials of the person entering the note (e.g. **MCL.07/01/12.DP**).

Entering a non-blocking note will result in the NOTES icon to show yellow on the Patron Record however no pop-up will be presented. You may also choose to use the **Local Library Use** field for non-blocking notes. Examples of situations that would warrant a non-blocking note include a phone number not working, an email failure, local patron fine exemptions or indications of patron privileges limitations such as a MUF card.

CLAIMS RETURNED

When a patron claims to have returned an item owned by another library, first check your shelf for the item and then ask the owning library to perform a shelf check. If not found at either library, renew the item (if allowed) and ask the patron to check again at home or in the car.

If still not found, refer the patron to owning library. Each library determines whether to offer claims return, maximum limits on claims returns, and what procedure to follow. **Therefore, the issue must be resolved through the owning library and only the owning library can mark the item “claims returned”!**

If an item with status “claims returned” is later found and returned, the total claims on the patron status will stay the same, it will not decrease. Therefore, it is recommended that “claims” be used only as a last resort because it is a “lifetime” counter.

LOST ITEMS

In cases involving a lost item, staff or the patron **must contact the owning library**. Not all libraries accept a replacement copy and some libraries charge an additional processing fee; therefore, it is imperative that the owning library be contacted to ascertain what action is required of the patron to make restitution.

When accepting a payment that has been approved by the owning library, staff should make a copy of the patron’s account showing the item(s) and barcode(s) and have the check made payable according to the directions of the owning library. Forward the money and copy of patron’s account to the owning library with a short explanation. Be sure to provide contact information of staff member who handled the situation in case any questions arise.

Do not resolve the patron’s account status. It is the responsibility of the owning library to resolve the patron’s account status. To maintain a record of the item on the patron’s record the owning library may choose to use the Declare Item Lost option in LEAP.

It is recommended that long lost items be checked in and withdrawn. A “Long Lost Item” report is sent to the circ-xxx email on a regular basis and lists items Lost for two or more years. Refer to the [Working with Long Lost Items](#) LEAP Tip. If the item is lost more than two years, the check in process will not remove the replacement cost from the patron record so it is safe to check in and withdraw. If lost for less than two years, a check in will result in the replacement cost being waived and a maximum fine of \$5.00 being assessed. If an item with a status of Lost was paid, it is recommended that the item be withdrawn as soon as your local library’s procedures dictate.

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DAMAGED MATERIALS RETURNED BY PATRON

Always complete a [Damaged/Missing Item Slip](#) (in appendix) and preserve the information of the previous borrower, either by screen shot, completing the slip or leaving the item charged to the patron.

Item not operating correctly - If a patron returns a media item that they report as not operating correctly (problems they are not responsible for), check-in the item and attach a [Damaged/Missing Item Slip](#) (in appendix) explaining the reported problem. If the check-in results in a window for the item to fill a hold, respond no to filling the hold and yes to reactivate the hold. This should result in a window for the item to be sent to the owing library. If not, call the owing library to request the item status be changed to Unavailable.

Damaged by patron - When an item belonging to another MAIN library is returned to your library and appears to have been damaged by the patron, **DO NOT CHECK-IN THE ITEM**. Notify the patron about the problem and alert them that the issue needs to be resolved with the owing library. Notify the staff of the owing library of the problem. Complete and attach a [Damaged/Missing Item Slip](#) (in appendix) including a detailed explanation. Add a note about the problem to the patron's library account in LEAP. The note must include the library's initials, the date the note was entered, and the initials of the person entering the note (e.g. MCL.07/01/12.DP). Pack the item securely and return to the owing library.

Returned with missing parts - When an item belonging to another MAIN library is returned to your library and has missing parts, **DO NOT CHECK-IN THE ITEM**. Notify the patron about the problem and try to obtain the missing part within 1-2 days. If the missing piece is not promptly returned, notify the staff at the owing library of the problem. Complete and attach a [Damaged/Missing Item Slip](#) (in appendix) including a detailed explanation. Add a note about the problem to the patron's library account in LEAP. The note must include the library's initials, the date the note was entered, and the initials of the person entering the note (e.g. MCL.07/01/12.DP). Pack the item securely and return to the owing library. If the missing piece is subsequently returned to your library, pack it securely and return to the owing library; include the item barcode, title, and send attention to the appropriate staff member.

DO NOT ACCEPT PAYMENT FOR AN ITEM OWNED BY ANOTHER LIBRARY until they have been contacted and the appropriate replacement/repayment specifics determined by the owing library.

DO NOT SHIP DAMAGED MATERIALS TO FILL ANOTHER HOLD. Return the item to the owing library. Always Reactivate any pending holds when queried.

OVERDUE AND BILL NOTICES

Overdue notices for Patrons with notification by email are sent and posted automatically by the system on a daily basis. Overdue notices for Patron with notification by phone or mail will be sent as an attachment to the circ-xxx email account each Wednesday morning. Open the attachment and print the notices. If you would like to run the report more frequently, you may do so from the **Reports and Notices/Notices** section of Polaris. Select the Overdue and Billing report which matches the mailing format of your choice. The recommended procedure is to save the generated PDF to your computer before printing so it can be retrieved in the event the print process fails. Respond “yes” to the pop-up regarding posting. If you do not post the notices, the same items will be on your next printing and you may send duplicate notices.

Bill notices are only sent by mail regardless of notification method. They are sent as an attachment to the circ-xxx email account each Wednesday morning. Open the attachment and print the notices. You may choose to run the report more frequently as described in the previous paragraph.

Overdue notices are generated based on the following criteria:

- 1st overdue – 15 days or more overdue
- 2nd overdue – 30 days or more overdue
- Bill – 60 days or more overdue

An item becomes Long Overdue when it is 45 days past the due date regardless of the status of the 1st/2nd overdue notes being generated. A Long Overdue item causes a system-generated patron block.

It is possible to print an “insta-bill” for a specific patron from Reports & Utilities /Notices/ Patron Billing Statement by Patron Barcode.

A bill can be manually generated for charges related to lost items, missing parts, or other fees. When you add a new charge or select an existing unbilled charge and select the Send a Bill option, the charge appears in a new section on the patron’s billing notice when the Billing Report is next run. Charges previously billed to the patron cannot be manually charged. Permission for this function can be turned on at the library-level upon request.

e-RECEIPT

The eReceipt feature can be selected by a patron in the PAC or by staff in LEAP to receive their checkout and payment receipts by email. Select email in the eReceipt Option field of the Patron Registration Record.

ON-THE-FLY

If you create an On-the-Fly record at the time of check out, be sure to have the item corrected when it is returned. A Hold Request can be placed on the item so upon return you can deliver it

CIRCULATION

to the Technical Services staff for linking to the appropriate bib record. Items should not remain linked as On-the-Fly for an extended period of time. Refer to the TechTip [Locating and Handling On-the-Fly \(OTF\) Records](#) for more information.

CIRCULATION STATUSES FOR ITEMS OUT OF CIRCULATION

The circulation status of **In-Repair** should be used for items that are removed from the collection for a short period of time. These items will continue to be displayed in the PAC; however, no new holds can be placed.

The circulation status of **Unavailable, Missing and Bindery** can be used for items that may be out of the collection for a longer period of time. These items will not be displayed in the PAC and no new holds can be placed.

MAINTENANCE TASKS

There are ongoing maintenance tasks that should be performed with the intent of keeping the circulation of items and filling of holds working efficiently for the benefit of our library patrons. A [chart of recommended tasks](#) and frequency can be found in the appendix.

HOLDS FULFILLMENT

PLACING HOLDS

Place holds only on bib records with at least one linked item. **Do not override and place Hold Requests for titles with no items linked** because they will be deleted on a regular basis. There is a system imposed limit of 25 requests per patron (this limit varies for restricted memberships). Included in this limit are those holds with a status of *On Waiting List*, *In Process*, or *Inactive*. It does not include holds with a status of *Enroute* or *Ready For Pickup*.

When placing holds on bib records with DVD sets, be aware that a window will open for you to make a selection based on the information entered in the volume field of the linked items. Due to varying standards in packaging and labeling, not all volume information is necessarily equal. For example, V.1 could contain disc 1&2 at one library and only disc 1 at another. A volume of SET indicates that all discs are included in a single item. The current standard ([Polaris Volume Field for DVDs/BluRays](#)) is to enter the actual disc numbers in the volume field, for example DISC 1-3 for TV series (not feature films); however, we may continue to see the V.x and SET specification in older item records.

If a barcode appears in a Hold Request record, the hold is for just that one specific item. Unless you need a specific item, it is best to place a hold at the bib level in the event that any one copy is missing.

Holds are filled based on the order in which they were placed. The “Prefer my Patron” policy being used in the system does make items owned by a library available to their patrons first. An item must be scanned in a Check In window in order for this feature to be activated. You can refer to [Prefer My Patron](#) for more information.

If you have an item in-hand that you would like to use to fill a hold, refer to the CircTip [Fill Request Now](#) for a convenient way to satisfy the hold. This will work even if the edition you have does not match the bib record for which the hold was placed (e.g. hard cover vs. paperback).

PICK LIST

The items on the pick list should be **pulled from the shelf and sent In-Transit at least once daily** Monday through Friday. Each library may use their discretion in determining whether to pull items on the pick list on the weekends.

If an item appears on your Pick List, you must do something about it in a timely fashion (maximum of three days). **You cannot just ignore it or remove the hold.**

If you are unable to locate the item, change the circulation status to **Missing** so the hold can be filled by another item. If the missing item is the last in the system, **notify the patron’s home library (or MCL if that is the pickup library)** that the hold cannot be filled, including the item

HOLDS FULFILLMENT

title/ barcode and the patron's name/barcode in the notice. It is up to the home library (or MCL) to either remove the hold or convert it to an ILL request, and notify the patron of a delay in filling the request.

IN-TRANSIT SLIP

The **in-transit slip should be placed inside the book with a sufficient portion sticking out** so it will not slide down into the pages. Slips can also be placed in the pocket of the item. If tape is used to affix the in-transit slip to an item, **use only one piece of non-stick or removable tape.**

Do not use masking or painters tape or any tape other than non-stick or removable tape. For efficiency in removing the slips, **do not place them under plastic covers or slip them into dust jackets.**

HOLD NOTICES

Patrons are notified when their hold is ready for pickup via phone, email, text or mail based on specifications in the patron record and the default parameters for each library.

If a patron record specifies "Notify=Phone" and your library is defined as using the automated notification system, an automated call is issued within minutes of the item being held.

If a patron record specifies "Notify=Email", the system will send an email to the address in the primary and alt fields when the next hold notification job runs. Also initiated from the hold notification job are text messages for those with either "notify=Txt Messaging" or the "Additional Txt Message" box checked. The schedule for the notification job is: Mon-Thur 7:45am, 11:45am, 3:45pm, 7:45pm; Fri-Sun 7:45am, 11:45am (times are approximate).

FAILED CALLS

A "**Telephone Failure Report**", listing any held items for patrons that the telephony system was unable to notify, will be emailed to the Circ-xxx email account daily. If it is determined that the phone number is not in service, **send a paper** (or email if available) hold notice to the patron and **add a note** to the Local Library Use field on the patron registration record requesting an update to the phone number.

FAILED e-MAILS

On a daily basis, you should check your Circ-xxx email account for notices that were not delivered successfully. By displaying the attachments to the failed email, you can determine why the email failed and the text of the failed notice. For failed hold and overdue notices, you will want to contact the patron by phone or mail. Additionally, correct the email address or change notification to phone. The [Common eMails chart](#) in the appendix provides details about emails that may be sent to patrons.

HOLDS FULFILLMENT

HOLD PICKUP AUTHORIZATION

To comply with patron privacy standards, it is recommended that you use the “**Authorized to Pickup My Holds**” field of the patron registration record to identify individuals for which the patron has granted permission for checking-out their items on the hold shelf.

UNCLAIMED HOLDS

On a daily basis, use the LEAP Utilities/Picklist Processing/Unclaimed to display the items on your hold shelf which have not been picked up. These should be removed in a timely fashion so as not to retain another library’s materials beyond one week. Check-In the listed items to make them available for the next hold, or to be returned to the shelf or owning library. The borrowing library is responsible for any items that are “held” but cannot be located.

SUSPENDING HOLDS

A hold request can be suspended until sometime in the future by changing the Activation date in the hold request. The request status will be Inactive. On the selected date, the hold request will activate, the request status will change to “on waiting list” or “In-Process” and the hold request will resume its position in the holds queue.

REACTIVATE HOLDS

When checking in an item that can fill a hold, the system will present a window to ask if you want to fill the hold with the item. If for any reason you respond NO, a second window is presented that prompts you to respond to the question **Do you want to reactivate the Hold?, always respond YES**. Otherwise, the patron will be removed from the holds queue.

UNFILLED HOLDS

It is recommended that you regularly check for patron holds that are unlikely to be filled for one of many reasons. The “Hindered Holds” report is automatically generated and sent to the Circ-xxx email user on a monthly basis. Review this report to identify any holds that cannot be filled and may require an Interlibrary Loan request.

PHONE OR IN-PERSON REQUESTS

Do not send a patron to another library without calling first to have the shelf checked and determining that the patron’s card is still valid.

Before calling the holding library, check the item status and get the owning library’s call number. Also, have your patron’s name, phone number, and barcode available and check that they are in good standing. You can access a current listing of the [MAIN Library Hours and Phone numbers](#) on the MAIN website. If the item is available, ask the holding library to place a hold for your patron making the pickup location either your library or theirs depending on the

HOLDS FULFILLMENT

patron's preference. Refer to the Circ Tip [Fill Request Now](#) for details on how to scan the item in-hand to satisfy the hold.

BOOK CLUB HOLDS

Libraries employ a variety of techniques in requesting items for their book clubs. Here are some methodologies:

- Use a Patron Record Set to keep a list of club participants.
- Use the Multi-Request option in the Hold Request window to place holds for either multiple patrons or multiple bib records.
- Use a single “book club” registration to place holds but check out the items to individual patrons.
- Use the CircTip [Placing Hold Requests – Multiple Copies, One Title](#) to place multiple holds on one title for your book club.

Please follow these guidelines when working with book clubs:

- Items should not be held beyond the normal time period. Contact the owning library if there is a circumstance requiring an item be held longer.
- Do not manipulate the due date for an item owned by another library.
- Do not waive fines on materials owned by other libraries.

GROUP HOLDS

Use the Group Holds function of LEAP to link together multiple holds on a patron's record that will all be considered complete when the first of these holds are filled. For example, if a patron will accept either a paperback or hardcover edition of an item, place a hold for each, then “Group” these two holds. The first available on either bib record will satisfy the hold request, and the other request in the group will automatically cancel. See the CircTip [Grouping Hold Requests](#) for details.

LONG IN-TRANSIT ITEMS

A report listing items that have had a Circulation Status of In-Transit or Transferred to or from your library for more than 30 days is sent to the circ-xxx email account monthly. Check your shelf and request other involved libraries to check their shelf. If not found at either library, change the circulation status to MISSING within one month. If it is the last item in MAIN, notify the home library (or MCL if that was the pickup library) so they can place a JerseyCat request. The notified library should remove the hold or convert it to an ILL request.

If an item has a status of Transferred, it was being sent to fill a hold request. If not found at either library, **change the circulation status to Missing** so the hold can be filled with a different item. If it is the last item in MAIN, notify the home library (or MCL if that was the pickup library) so they can place a Jersey Cat request. The notified library should remove the hold or convert it to an ILL request.

HOLDS FULFILLMENT

PACKAGING GUIDELINES

- **Do not send an item that does not have a Transit slip** without first verifying its intended destination in LEAP. Check-In the item to generate the necessary slip.
- The **in-transit slip should be placed inside the book with a sufficient portion sticking out** so it will not slide down into the pages or in the pocket of the item. If tape is used to affix the in-transit slip to an item, **use only one piece of non-stick or removable tape**. **Do not use masking or painters tape** or any tape other than non-stick or removable tape. For efficiency in removing the slips, **do not place them under plastic covers or slip them into dust jackets**.
- When returning materials, the borrowing library must **remove any date due stickers or slips that were put on the item**. For damaged material, attach a [Damaged/missing slip](#) (in appendix) and follow the procedure in Damaged section below.
- **Wrap all media items in bubble wrap** or insert in a “bubble” bag (no fiber Jiffy bags) before placing in regular plastic bag with routing slip. If putting more than one media item in a “bubble” bag, place bubble wrap between the items to prevent damage.
- If using a **cardboard box to ship many items, place media in protective wrapping and fill empty space with filler**, otherwise items can get damaged and boxes break open.
- Items to be sent to any library through the courier service should be **packaged in a plastic bag with a routing slip** which denotes the route number for the destination library and has your library information on the reverse side. The LLNJ website has a [label generator](#) to produce the routing slips. The routing slip should be clear and easily seen through the bag, which is then **secured with two rubber bands**. Use packing tape on boxes and secure shipping label on top of the box. Follow the [LLNJ guidelines for shipping materials](#).
- **Do not overfill packages** so that they are too heavy to handle, or that the packaging gets damaged.
- If material is received damaged and unusable, ask the owning library to change the item status to Unavailable or In-Repair so that the patron’s hold will remain in the system and send the item back to the owning library with a [damaged item slip](#).
- **Return bubble bags or boxes that are identified as owned by a particular library on a timely basis**, whether or not you have media to return. Do not hold onto them.
- Kindly reuse **routing slips** by flipping over to return items to the sending library.

DAMAGED MATERIALS FOUND WHEN UNPACKING

Here are steps to follow if you receive damaged materials that **you own**:

If you get back one of your items that is damaged but has been discharged, refer to the last user information to contact the patron about correcting/reimbursing for the damage and place a blocking note about the problem on the patron’s library account in LEAP and bill the patron when necessary. The note must include the library’s initials, the date the note was entered, and the initials of the person entering the note. Resolving these issues involves taking the patron at their word if they deny the damage (perhaps it was a result of shipping).

HOLDS FULFILLMENT

Once the problem is resolved either through replacement or payment, remove the note on the patron's record. If a patron claims they are not responsible for the damage, the owning library will absorb the cost of the loss or damage.

Here are steps to follow if you receive damaged materials that **are owned by another library**:

Do not fill a hold with an item you know is seriously damaged. Notify the owning library to alert them to the damage and request that they change the Circulation Status to Unavailable. Return a seriously damaged item with a [damaged item slip](#) to the owning library. Check if the item is the last copy in MAIN, if so, request through interlibrary loan or notify patron.

If an item is usable, but you want to note the condition (e.g. cracked case, loose spine, writing), attach a note to the item indicating the condition when received at your library.

DELIVERY SERVICE

Information on the courier service, including the shipping label generator, is available on the [Library Link New Jersey \(LLNJ\) website](#). Contact LLNJ at 732-752-7720 to report problems with delivery or to request small or large shipping bags. To keep the delivery operation running smoothly, always return spare blue plastic shipping bins and do not keep an excess inventory at your library.

INTERLIBRARY LOAN

The common practice is for ILL borrowing to be performed at a patron's home library or for Morris County residents, the Morris County Library. Items must be returned at the location where they are borrowed. Items borrowed through Interlibrary are linked in the LEAP either using the ILL module or the more manual method of linking an item to an ILL—xxx bib record.

Details for using the ILL module in LEAP can be found in the LEAP Tip [Using the ILL Function in LEAP](#). Basically, when you submitting a request for an ILL item in Jersey Cat (or other method), you can create a "parallel" Hold Request in LEAP that will display in the patron hold requests screen and can be tracked by both staff and the patron. It will be used to automatically create an ILL bib and item record when the item arrives which is easily removed when an item is returned. When using the ILL function, returned items should be checked in and then deleted; do not withdraw these items.

In-person borrowing with a completed ALA form is still supported at many libraries, including the local colleges. Always call before sending a patron to another library with an ALA form.

DO NOT...

Do not...renew an item that has a hold.

Do not...renew an item that exceeds the renewal limit.

Do not...send a damaged item to fill a hold.

Do not...send a patron to another library without calling first to have the shelf checked and determining that the patron's card is still valid.

Do not...accept replacement copies or payment for another Library's material until you have discussed with owning library.

Do not...place a hold on a bib record with no items attached.

Do not...answer NO to the "Do you want to put it In-Transit to xxxx?"

question. Always answer YES so the Circulation Status is accurate and does not show the item as "In" when it is actually at another library.

Do not...mail a library card to an Online Registrant before they have presented ID at the home library Circulation Desk.

Do not...use Special or Reset Due Date to change the default due date for items from other libraries.

Do not...enter any letters or characters other than hyphens and numbers in the phone fields.

Do not...mark an item Claims Returned or Claims Never Checked-Out if it is owned by another library.

Do not...register a patron before searching for an existing registration.

Do not...mark an item paid if you are accepting payment for an item from another library; the payment is sent to the owning library and then marked paid by them.

Do not...register a patron without following data entry standards regarding capitalization, punctuation, phone number, postal abbreviations, and statistical class.

Sample Library Card Registration Form

In order to receive a library card, you must provide a valid proof of ID and address.

Barcode # _____	Staff Initials _____
	Date _____
<i>Please Print</i>	
Name _____	
Address _____	Apt # _____
City _____	State _____
	Zip _____
Home Phone _____	Cell Phone _____ provider _____
E-mail _____	
Notify via EMAIL or PHONE or TXT Messaging <i>(circle one)</i>	
<u>Business</u> <i>(If not a Resident)</i>	
Business Name _____	
Address _____	
Phone () _____	
Authorized to pickup my holds _____	
<p>I apply for the right to use the library and will abide by its rules. I will pay any fines and charges levied on me, and give prompt notice of any change in address or phone number. _____</p>	
SIGNATURE	
<p>I understand that I am responsible for all items borrowed on this card, and all fines and charges levied on it. _____</p>	
SIGNATURE OF PARENT/GUARDIAN/RESPONSIBLE ADULT (IF SIGNING FOR MINOR CHILD)	

PATRON CODE USAGE AND PRIVILEGE LIST

Last Updated – February 26, 2019

Patron Code Name	Issued At	Usable At	Patrons Place PAC Holds?	Pick-Up Eligibility	Registration Renewal Period	Max # Items	Max # Holds
Books by Mail	MCL	MCL	No	MCL	3 years	100	25
College Student	All	All	No	N/A	1 year	25	0
Computer Use Only	All	Envisionware use only	No	N/A	3 months	0	0
Courtesy-XXX	XXX	XXX *	Yes **	XXX *	1 year	100	25
Interim	All	All	No	N/A	1 month	25	0
K-12	All	All	Yes	No limit	1 year	100	25
MAIN-Pay	All	All	Yes	No limit	1 year	100	25
MUF	MUF libraries	MUF libraries	No	N/A	1 year	100	0
Online Registrant	PAC only	Nowhere	Yes	No limit	1 month	0	5
Open Borrower	All	All	No	N/A	1 year	100	0
Organization-School	All	All	No	N/A	1 year	100	0
Patron	All	All	Yes	No limit	3 years	100	25
Temporary-XXX	XXX	XXX	No	N/A	3 months	25	0
Boonton Twp	MCL	MCL	Yes **	MCL	3 years	100	25
Mine Hill	MCL	MCL	Yes **	MCL	3 years	100	25
Netcong	MCL	MCL	Yes **	MCL	3 years	100	25
Victory Gardens	MCL	MCL	Yes **	MCL	3 years	100	25

* = Courtesy card holders at local libraries within Morris County may use their card at the Morris County Library as well as the library issuing the courtesy card.

** = While holds may be placed by the patron, libraries reserve the right to refuse the request.

DEFAULT MATERIAL PRICES

(Updated: March 2019)

Item Type	Default Price
Art	\$75.00
Atlas	\$75.00
Audiobook (Cassette)	\$50.00
Audiobook (CD)	\$75.00
Audiobook (Playaway)	\$75.00
Blu-ray	\$40.00
Book	\$35.00
Book Club Kit	\$100.00
DVD	\$35.00
Equipment	\$100.00
eReader	\$100.00
Game/Toy	\$50.00
Government Doc	\$20.00
ILL Item	\$25.00
Large Type Book	\$40.00
Large Type Paperback	\$40.00
LP Record	\$20.00
Magazine	\$ 7.00
Microfiche	\$15.00
Microfilm	\$30.00
Multimedia Kit	\$50.00
Museum Pass	\$150.00
Music Cassette	\$10.00
Music CD	\$25.00
Newspaper	\$5.00
Paperback	\$25.00
Readalong	\$30.00
Reference Book	\$100.00
Rental AV	\$35.00
Rental Book	\$35.00
Score	\$40.00
Slide	\$50.00
Software	\$50.00
Talking Book (for blind)	\$10.00
VHS	\$35.00
Video Games	\$60.00
Video Playaway	\$100.00

COMMON E-MAILS SENT TO PATRONS

All emails to patrons are sent from circ-xxx@mainlib.org. If a patron reports that they are not receiving email, the emails may be automatically being diverted to spam by their email filters. To avoid this situation, they should add the circ-xxx address to their address book or specify it as a permitted sender.

Purpose	Subject Line	Sent if:	Timeframe for Sending:
ALMOST DUE	A reminder from your library	Email address specified in patron record	3 days before due date; includes items due in 3 days as well as all other items checked out
REGISTRATION EXPIRATION	Your library membership will expire soon	Email address specified in patron record	14 days before expiration date
1ST OVERDUE	1 st Overdue Notice	Notification option = Email Address	When item is 15 days overdue
2ND OVERDUE	2 nd Overdue Notice	Notification option = Email Address	When item is 30 days overdue
HOLD	Requested items are ready for you	Notification option = Email Address	The next run, after an item is held, based on the following schedule: Mon-Thu: 7:45am, 11:45am, 3:45pm, 7:45pm; Fri-Sun 7:45am, 11:45am
CHECK OUT	Checked-out from your library	eReceipt option = Email Address <u>and</u> the circulating library has eReceipts enabled	When items are checked out
RENEWAL	You Renewed Library Items	eReceipt option = Email Address	When items are renewed
RECEIPT	Payment Receipt	eReceipt option = Email Address	When fines/bills are marked paid
NEW ITEMS OF INTEREST	Saved Search Results	Patron sets up a saved search list to be notified when items are added that satisfy those search terms	Monthly

COURTESY SERVICE

Your Board of Trustees may decide to offer Courtesy Service to individuals who **work** in your town, but do not reside in a community served by a MAIN, Inc. library, and are not eligible for Open Borrowing. Please follow these procedures when entering a Courtesy Patron.

Verify that they are **not eligible for a full-service card at another Morris County library.**

Verify that they are **not eligible for an Open Borrowing card** by checking the list of Participating Libraries.

Verify that they are **not already in the system.**

The patron must **present proof of employment.** Minimum requirements for this should be a recent pay stub or a letter, on company letterhead, from the business owner, supervisor, or Human Resources Department. A current company I.D. badge is also desirable, but not acceptable on its own.

Courtesy service borrowers must **read and sign the Courtesy Service Agreement.** They keep the top portion of Courtesy Service Agreement, the bottom portion should be kept on file by the issuing library. Individual libraries may choose to have the patron complete their standard registration form as well (perhaps in place of the bottom portion of the Courtesy Agreement Form.)

They are issued a standard card for their library. A yellow Courtesy sticker, stamped with the library's 2-digit code should be near the barcode. Bernards Township Library uses a standard Bernards Township card that is identified by a hole punch and red sticker; these courtesy card patrons are limited to using the Bernards Township Library.

The **patron profile** should be specified as COURTESY-xxx (for your library). **Expiration date** should be set to one year. In addition to their home address, enter an **address with Type=Work** specifying the employer and employer address.

Morris Automated Information Network, Inc. Courtesy Service Agreement

Welcome to the _____ Library. You have been issued a library card for Courtesy service. Please read the agreement below and sign. Also you must complete a registration card for the Library files.

I agree to the following:

- This card entitles you to in-person service at the _____ Library and the Morris County Library.
- You may place holds on materials owned by other MAIN, Inc. libraries, but each library reserves the right to restrict all or parts of their collection.
- You may pick up holds at the _____ Library or the Morris County Library only.
- This card expires in 1 year and must be renewed annually. Proper identification will be required for renewal.
- Any violation of the above will result in immediate expiration of your card.

I will comply with the _____ Library rules and the MAIN, Inc. Service Agreement. I will pay all fines or damages charged to me. I alone, am responsible for the use of this card.

Signature _____ Date _____

MAIN Courtesy Service

Name: _____

Home Address: _____

Home Phone: _____

Type of ID: _____

Signature: _____ **Date:** _____

PAY SERVICE

Your Board of Trustees may choose to offer pay service. If so, this service may only be offered to an individual who resides in a municipality not served by a MAIN library. Pay service may be sold to residents outside of the MAIN service area. The fee to be charged is set by the MAIN Membership Policy Manual and all services should be made available to patrons with a pay card. Please follow these procedures when entering a Pay Service Patron.

Verify that they are **not already in the system.**

Verify that they are **not a resident of a municipality that is served by a MAIN library.**

The patron must **present proof of residence.** Acceptable proof of residence would be a driver's license, current lease, tax bill or an official piece of mail, such as a utility bill no more than 1 month old. Personal correspondence or junk mail is not acceptable proof!

Pay service patrons must **read and sign the Pay Service Agreement.** They keep the top portion of the Pay Service Agreement, the bottom portion should be kept on file by the issuing library. Individual libraries may choose to have the patron complete their standard registration form as well (perhaps in place of the bottom portion of the Pay Service Agreement Form.)

They are issued a library's normal library card like a regular patron, however, a "MAIN" sticker must be placed on the front of the card. Stickers should be affixed to library cards at least 72 hours in advance in order for the adhesive to firmly stick to the card. A supply of one dozen pay cards with stickers attached, should therefore be ready to be sold at any time.

The **patron profile** should be specified as **MAIN-Pay.** **Expiration date** should be set to one year. If a pay patron is paying to renew a card, extend the expiration date by one year from the expiration date rather than one year from today's date, unless the expiration date is already passed.

Morris Automated Information Network, Inc. Pay Service Agreement

Welcome to the _____ Library. You have been issued a library card for pay service. Please read the agreement below and fill out the bottom portion for the library files.

I agree to the following:

- This card entitles you to all the rights and privileges extended to patrons at this library.
- You may place holds on materials owned by other MAIN, Inc. libraries and check out materials at other MAIN, Inc. member libraries in-person.
- You may pick up holds at any MAIN, Inc. member library.
- This service must be renewed annually at a current rate to be established by the MAIN, Inc. membership.
- Violation of library policies will result in immediate expiration of your card and the library will not refund any portion of the annual fee.

I will comply with the rules set forth here and in the MAIN, Inc. Service Agreement. I will pay all fines or damages charged to me. I, alone, am responsible for the use of this card.

Signature: _____

MAIN Pay Service

Name: _____

Home Address: _____

Home Phone: _____

Type of ID: _____

Signature: _____ **Date:** _____

Interim MAIN Membership Form

Library Patron: Please read the agreement below and complete the top portion.

I agree to the following:

- This membership entitles me to checkout materials, one-time, at a library other than my home library.
- I will present proof of address/identification along with this form to my home library within 30 days.
- I will comply with the rules of the issuing library and the MAIN, Inc. Service Agreement.
- I will pay all fines or damages charged to me.

Name: _____

Home Address: _____

Phone: _____

Email: _____

Signature: _____

Library staff: complete the following, make a copy for your record, and give the completed form to the patron to be presented when registering at home library.

Assigned Barcode: INTERIM_____

(Assign 2-digit library identifier and a 4-digit unique identifier; e.g. a Madison patron checking out at Florham Park would be assigned the barcode INTERIM110001)

Type of ID presented: _____

Registered at: _____

Date: _____

Recommended Circulation Maintenance Tasks

<u>Holds</u>-Related Maintenance Tasks	Recommended Frequency	Delivery Method
<u>Fill hold requests</u> – pick the hold requests for both your patrons and requests made by patrons from other libraries	Daily, weekends optional	Use LEAP – Utilities/Picklist Processing/Pending
<u>Unclaimed holds</u> – remove the items from your hold shelf when they are not picked up by the unclaimed date	Daily	Use LEAP – Utilities/Picklist Processing/Unclaimed
<u>Holds Alert Report by Branch</u> – can be used to check the number of hold requests against the number of copies owned; useful for collection development to know if you need additional copies of a particular title, and, for determining if the hold can be filled with a hardcover or other edition. If so place another hold and <u>group the holds</u> .	Weekly	Use Polaris – Utilities – Reports and Notices – Circulation – Holds – Holds Alert Report by Branch
<u>Hindered Holds Report</u> – Lists your library patrons with hold requests that appear unfillable: 1) no items, 2) active for more than 4 months, 3) unclaimed at least 2 weeks. Review to see if the hold request can be filled with another copy in MAIN; if not, change to a JerseyCat request.	Monthly	Email sent to circ-xxx
<u>Holds on Items to be Withdrawn</u> See Circ <u>Tip How to Find Holds in Withdrawn Records</u> to remove the holds on these items	Monthly	Email sent to circ-xxx
<u>Item</u>-Related Maintenance Tasks	Recommended Frequency	Delivery Method
<u>Intransit and Transferred Report</u> – List Items that have had a Circulation status of In-Transit or Transferred to or from your library for more than 30 days. Check your shelf and request other involved libraries to check their shelf. If not found at either library, change the circulation status to MISSING within one month. If it is the last item in MAIN, notify the home library (or MCL if that was the pickup library) so they can place a JerseyCat request. The notified library should remove the hold or convert it to an ILL request.	Monthly	Email sent to circ-xxx

Recommended Circulation Maintenance Tasks (cont.)

Create a List of Items Marked MISSING – necessary to periodically check the shelves for MISSING items to correct the status, then, proceed according to your library’s practice, for example, replace the title and/or withdraw the record.	Monthly	Use LEAP – Item search
Create a List of Items Marked In-Repair, Unavailable – verify item location to update these circulation statuses if the item is back on the shelf	Monthly	Use LEAP – Item Search
Change Holdable Status of New Items To comply with MAIN policy, you must change items to be holdable by all patrons once owned for 2 months.	Monthly	Use LEAP – Item Search; bulk change
Working with Long Lost Items - Review the Long Lost item report to withdraw items that have been Lost for an extended period of time.	Quarterly	Email sent to circ-xxx
<u>Patron-Related Maintenance Tasks</u>	Recommended Frequency	Delivery Method
Read all MAIN patron queries and reply as appropriate	Daily, weekends optional	Email sent to circ-xxx
Handle failed email notifications – manually notify patron and update contact information. See FAILED e-MAILS	Daily, weekends optional	Email sent to circ-xxx
Handle failed telephone notifications – attempt to manually notify patron and correct/update phone number. See FAILED CALLS .	Daily, weekends optional	Email sent to circ-xxx
OVERDUE AND BILL NOTICES on p. 13 in the M.A.I.N. Circulation Manual for more details	Weekly	Email sent to circ-xxx
Find patrons with incorrect information in phone number fields – necessary to remove the other characters in the phone number field so the Polaris Telephone Service (PTS) automated calls don’t fail	Quarterly	Use Polaris – Patron Search
Locate Mismatched Patron Barcodes and Libraries	Quarterly	Use Polaris – Patron Search
Locate Mismatched Patron Statistical Class on Registration Records	Quarterly	Use Polaris – Power Search
Locate Patrons with Incorrect Expiration Dates – this is necessary to correct expiration dates greater than 1 year for patrons with Courtesy cards, MUF cards, and Open Borrowers	Quarterly	Use Simply Reports
Merging a Patron Record	As needed	Use LEAP (must login as circsup-xxx)

M.A.I.N.

**DAMAGED / MISSING
ITEM**

DISCHARGED -

Noting prior damage or reporting
item not operating properly

NOT DISCHARGED

PATRON ID# _____

NOTE ADDED TO PATRON RECORD _____

RETURNED TO _____ LIBRARY

STAFF INIT: _____

DAMAGE: _____

MISSING PARTS: _____

RETURN TO OWNING LIBRARY

NOTES:

M.A.I.N.

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