

PINES Circulation Policies

August 2006

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

Issuing a Library Card

Policies

Library cards are free to all residents of Georgia. Persons who attend school, own property or are employed 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.

Property owners who do not reside in Georgia may be required to show proof of ownership, such as a tax bill or deed. Persons employed in Georgia or attending school in Georgia may be required to show proof of 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 charge and is good for 6 months.

Signing a PINES card application denotes acceptance of responsibility 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. Parent or guardian must show proper ID to register a child. A parent or guardian must sign the application for all children under 18. Signing a child's PINES card application denotes acceptance of responsibility for all fines, lost or damaged materials charged on that card.

A library card is required in order to check out materials. A library MAY waive the necessity for a card at the patron's home library, in which case a picture ID is acceptable.

Proper identification must be presented to register.

An applicant for a new card is required to provide proper ID, which includes current local address. Acceptable ID for a PINES card: a) photo ID showing current local address, OR b) photo ID and one item from approved list (see below) showing current, local address (if photo ID does

not have correct address), OR c) TWO (2) items from approved list showing current, local address. Acceptable ID includes valid driver's license, valid voter registration card, checks with pre-printed addresses, a utility bill, tax receipt or other piece of mail that shows the user's name and present address. The registering library is responsible for ensuring that a correct address is obtained.

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

Parents or guardians of children under the age of 18 must sign their child's application.

The charge for a replacement PINES card is \$2.

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. Consult your circulation supervisor for the policy at your library.

PROFILE NAME-The patron profile determines the user's loan period and fine rates. One of the profiles below will be assigned to each user.

PATRON	RESTRICTED
CLASS	TEMP
NON-RES	TEMPRES6
OUTOFSTATE	TEMPRES12
OUTREACH	TRUSTEE

STATISTICAL CATEGORIES-All PINES registrations will indicate Primary Language in the patron record.

SURVEYS-All PINES libraries, in conjunction with the Georgia Secretary of State's Office, will offer applicants the opportunity to register to vote at the time of registration, and at each subsequent change on the patron record. An embedded survey form indicating the acceptable choices will be completed on each PINES record.

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

Temporary Borrowing Privileges

Persons who will be in Georgia for less than 6 months, and reside outside Georgia, may be issued a temporary card. Privilege limit is 6 months. Privilege fee is ½ the fee charged for OUT OF STATE cards (\$12.50). This card carries limited borrowing privileges. Temporary cardholders may check out up to 5 items simultaneously. To register a temporary borrower, choose the profile name “TEMP” when entering the registration.

When PINES Patrons Move to Another PINES Library System

If the patron moves from one PINES library system to another, there is no need to delete the patron card. Instead, change the home library of the patron from the old library system to the new library system and update address and telephone information in the patron record. This will allow the patron to keep the same card; although it won't count as a new registration, the patron will now be included in reports of all patrons registered in the new library system

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

Check-Out/Renewal

Policies

A patron must present a card in good standing to borrow materials. A patron's card will be blocked, and no services may be obtained with it if the patron has 10 or more overdue items, or owes \$10 or more in unpaid fines and/or fees. Delinquent borrowers who have not reached these limits may still borrow materials; the system operator will be notified that the patron is delinquent.

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

If a patron *forgets their PINES card*, they can:

- Return home to retrieve it. Materials may be held for the patron.
- Purchase a replacement card for \$2. The procedure for Lost/Stolen Cards should be used in reissuing a card.
- Show photo ID to be allowed to checkout IF he/she is using his HOME library, and IF his/her home library honors this option. This is not an option if he is using another PINES library. This is NOT recommended.

User Status

User blocked

If a patron's record is blocked due to excessive overdue materials or fines, a PATRON-EXCEEDS-FINES message will appear upon attempting a checkout. Selected staff will have the authority to override excess fines.

User barred

BARRED is a status that is manually set by library staff. 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 him, he should be directed to speak with that library to resolve his status and restore his privileges. Each Library Director or designee shall decide the circumstances under which a patron may be barred. This status should be reserved for serious offenses, such as theft of library materials.

Proxy Borrowing

Any user may present another user's card to check out materials. Library staff should remind all patrons at the time a card is issued that they are responsible for all items checked out on that card, and that lost cards should be promptly reported.

PINES libraries also have the ability to check out items on hold to an authorized proxy user (often husband or wife), as opposed to the user who originated the hold, while maintaining the integrity of the holds queue. The authorized proxy is not required to present the originator's card, but the authorization for proxy permission should be noted in the patron record in the NOTES field. Because all library records are confidential in nature, PINES library staff must be aware that authorization of the originating user (the person placing the hold) is required for proxy checkout for all persons over 18 years of age.

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

Renewals

Renewal requests may be made in person or by phone.

Certain categories of materials are not eligible for renewal.

If a "HOLD" 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 PINES card or read his PINES barcode number to staff over the phone. Staff are encouraged to ask for a second item of identification, such as address or telephone number, to verify the identity of the caller. Items will not be

renewed with name only. Patrons may renew their items via the My Account feature of the OPAC.

Check-In

When checking in materials, it is VERY IMPORTANT to watch the screen as each barcode is scanned to be sure the scan is registering and to be aware of on-screen messages and directions. Messages directing the operator 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.

Bookdrop check-in

When checking in items from the bookdrop each morning, staff should set the Effective Date to reflect yesterday's date. Other dates may be selected if the library has been closed; however, the system will not accept a future date.

Fines/Fees

To encourage the prompt return of materials, the PINES libraries have established a schedule of fines and fees as penalty to those patrons who fail to return materials by their due dates.

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. First and second overdue notices are sent via email to those patrons with email addresses in their user records. The final overdue notice is always sent via US Mail.

The first overdue notice is generated at 7 days past the due date of an item.

The second overdue notice is sent at 14 days past the due date.

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

Paying Fines/Fees

PINES fines may be paid at any participating library. Fine will be retained by the collecting library, regardless of the original lending library. 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.

Lost Items

A patron may inform staff that an item is “LOST”. The price of the item, plus an optional processing fee of up to \$10, will be assessed to the patron’s card. Lost items may be paid for at any PINES library. Payments for lost or damaged materials will be returned to the owning library. These payments must be remitted monthly. The price of the item (found in the item record) plus the applicable processing fee will be assessed to the patron’s record upon declaration that the item is Lost.

Some PINES libraries have contracted for services with collection agencies. A fee for collection agency services may be added to a lost item record, and will be listed with a bill reason of REFERRAL. It is advisable to direct patrons whose accounts have been turned over to collections to the referring library, to ensure that all accounts are accurately cleared and fees settled.

Recovering Lost Items and Refunding Payment

If a lost item is found and returned within 1 year of payment, a refund of the paid replacement value, minus the overdue fines which have accrued, will be given. The “found” materials may be returned to any PINES library, with the understanding that the owning library will be the final authority on whether the material is in acceptable condition for return. The owning library will issue a refund check to the patron via U. S. Mail. The refund check will be payable to the library cardholder on whose record the materials were circulated.

Claims Returned

If a user claims to have returned materials that PINES still shows 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 record at any time.

Intra-PINES Lending

If a patron from Library A wishes to borrow an item from Library B, staff from Library A will place a hold on the item, specifying Library A as the pickup location. Library B will receive a report of items on their shelves, which have holds; they will pull those items listed and capture the existing holds. The screen will instruct staff to route the item to Library A to fill a hold, and the item will be put into transit to Library A. When Library A receives the item, it will be scanned and placed on the holds shelf for pickup. Once the item is scanned at the pickup location, a holds notice via email will be generated or staff will be prompted to telephone the user with holds notification.

The Holds report should be retrieved processed promptly each morning at each library site. Items listed should be pulled from the shelf, packaged and sent within 24 hours. The holds list is regenerated every 15 minutes, to ensure that the list is fresh whenever a library retrieves it during the day. Holds that are not processed within 24 hours will be re-targeted to another library if possible. Borrowed items should be promptly sent back to the owning library, or on to the next library to fill a hold. Items should be appropriately packaged to protect them from damage while in transit.

Holds

1. Materials will retain the same circulation period regardless of whether the patron is local or from another PINES library. When thinking of intra-PINES lending, it is important to remember that a PINES patron is a patron exactly like your local patron. Intra-PINES loans are not ILLs – they are simply circulations like any other. The PINES Executive Committee has ruled that circulations between PINES libraries must be free of charge to system libraries and to patrons.
2. Holds may be placed on items in any PINES library. If a patron presents the on-hold item for checkout before it is retrieved for the requesting patron, the in-house patron with item in hand receives preference; a circulation supervisor will override the hold and check out the item to the in-house patron. The requesting patron will be next in line for the item.
3. Most patrons may place an unlimited number of holds. Certain user categories are restricted to a limited number of holds.
4. PINES does not allow intra-PINES loans on the following item categories: Audiobooks; CDs; DVDs; Bestsellers; Equipment; Microforms; New Books; Reference; Reserve; Software; Toy; Videocassettes; Leased Materials; Kit; Outreach and Deposit (monetary). Items with these item types may be borrowed within regional library systems. For other item types, a title-level hold will find the first available copy of the title in PINES to fill the hold. The Holds report will first look for an available copy in the patron's pickup library, then in the pickup library's system; if no copy is available, it will then select a copy from another PINES library.
5. Patrons may place their own holds via the OPAC, and may select their pickup location and notification method. The software will refuse holds requests which do not conform to PINES policies. Patrons may choose any pickup location for holds.
6. The vision of the PINES statewide library card included as a key component the ability for patrons to see and borrow library materials from all participating public libraries in the state. Our goal is maximum access for all patrons, while realistically addressing the logistics of moving materials around the state. Member libraries have agreed that PINES

membership would not relieve libraries of the responsibility for purchasing the materials needed to meet the demands of local patrons.

7. Patrons whose PINES cards are expired will not be allowed to place holds until the card privilege is renewed.

My Account

Library users will be given a PIN upon registering for a PINES card. PINES policy indicates that PINs may only be given in person at a PINES library, upon presentation of appropriate ID. PINs may not be obtained via telephone or email.

At their first use of the My Account feature of the OPAC, patrons will be prompted to change the PIN to a 7-character password. Patrons may also choose to select a user name to use in place of the library card barcode when accessing My Account. User names must be unique within the PINES system. Patrons may change user name, password, and email address with My Account at any time.