

PLS CIRCULATION MANAGERS MEETING

AGENDA

June 20, 2024, 2:00-4:30 pm

Hybrid Meeting – Burlingame Public Library,
Upper Level Meeting Room
480 Primrose Road, Burlingame, CA 94010

Join Zoom Meeting

Meeting ID: 870 4605 9921

Passcode: 925944

<https://us02web.zoom.us/j/87046059921?pwd=aUlwcTc1L2p4VEgzTWppUmVWZi9nUT09>

Facilitator: Natalie Juhl, DCL

Recorder: Brian Malibrán, SSF

- I. Agenda Review
- II. Approval of the Consent Calendar (Action Item)
 - a. Minutes from meeting – May 16, 2024 (pg. 4-7)
 - b. Manual - 01.03 PLS Circulation System Managers Procedures (pg. 8-10)
 - c. Manual - 01.05 PLS Interlibrary Delivery System (pg. 11-16)
 - d. Manual - 03.04 Patron Entry Protocols (pg. 17-18)
 - e. Manual - 03.07 PLS Patron Database Management (pg. 19-20)
 - f. Manual - 04.01 Establishing Fee Structure (pg. 21-22)
 - g. Manual - 04.07 Paying Bills and Fees (pg. 23-24)
 - h. Manual - 06.01.01 Create Lists & Scheduler (pg. 25)
 - i. Delete section 04.06 PLS Unique Management Services [UMS or Unique]
 - j. Delete section 04.06.01 Unique Management Services and Debt Collect
- III. PLAN Items
 - a. PLS Delivery Report
 - b. PLAN Report
- IV. Action Items
 - a. Loan rule #1 for review – DCL (pg. 26-27)

- b. County Park Passes – SBL
 - c. Adult Passes iType – BPL
 - d. PLS Vendor List – Where to place it on FIDO? Should it be a section of the Circ Manual? - RCL
 - e. Email subject for the new Sierra notice to distinguish from “Statement of Charges” – PLAN
- V. Informational Items
- a. Mailout – SMCL
 - b. Clearing long billed items - BPL
- VI. Circulation Manual in FIDO Update/Review/Approve (ongoing)
- VII. Agenda Building
- VIII. Announcements
- IX. Public comments: Individuals are allowed three minutes, groups in attendance five minutes. It is system policy to refer matters raised in this forum to staff for further investigation or action if appropriate. The Brown Act prohibits the Circulation Managers from discussing or acting on any matter not on the agenda pursuant to state law.

Brown Act Brown Act: This meeting abides by Cal. Gov't Code § 54953. Cal. Gov't Code § 54953(b)(1) “Notwithstanding any other provision of law, the legislative body of a local agency may use teleconferencing for the benefit of the public and the legislative body of a local agency in connection with any meeting or proceeding authorized by law. The teleconferenced meeting or proceeding shall comply with all otherwise applicable requirements of this chapter and all otherwise applicable provisions of law relating to a specific type of meeting or proceeding.” Cal. Gov't Code § 54953(j)(6) A "teleconference" is "a meeting of a legislative body, the members of which are in different locations, connected by electronic means, through either audio or video, or both." Gov't Code § 54953 (b)(2) “Teleconferencing, as authorized by this section, may be used for all purposes in connection with any meeting within the subject matter jurisdiction of the legislative body. If the legislative body of a local agency elects to use teleconferencing, the legislative body of a local agency shall comply with all of the following:

- (A) All votes taken during a teleconferenced meeting shall be by roll call.
- (B) The teleconferenced meetings shall be conducted in a manner that protects the statutory and constitutional rights of the parties or the public appearing before the legislative body of a local agency.
- (C) The legislative body shall give notice of the meeting and post agendas as otherwise required by this chapter.
- (D) The legislative body shall allow members of the public to access the meeting and the agenda shall provide an opportunity for members of the public to address the legislative body directly pursuant to Section 54954.3.” Gov't Code § 54953 (3) “If the legislative body of a local agency elects to use teleconferencing, it shall post agendas at all teleconference locations. Each

teleconference location shall be identified in the notice and agenda of the meeting or proceeding, and each teleconference location shall be accessible to the public. During the teleconference, at least a quorum of the members of the legislative body shall participate from locations within the boundaries of the territory over which the local agency exercises jurisdiction, except as provided in subdivisions (d) and (e).”

Meeting Locations

Burlingame Public Library, 480 Primrose Road, Burlingame, CA 94010

Menlo Park Library, 800 Alma Street, Menlo Park, CA 94025

Redwood City Public Library, 1044 Middlefield Road, Redwood City, CA 94063

San Mateo County Library, 125 Lessingia Court, San Mateo, CA 94402

Next Meeting: July 18, 2024

Recorder: SMP

Next Admin Council Meeting: August 2024

Recorder:

RCL - January 2024

SBL - February 2024

SMCCCD - March 2024

SMCL - April 2024

BPL - May 2024

SSF - June 2024

SMP - July 2024

MPL - August 2024

RCL - September 2024

SBL - October 2024

SMCCCD - November 2024

SMCL - December 2024

PLS CIRCULATION MANAGERS MEETING

MINUTES

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Facilitator: Natalie Juhl, DCL

Recorder: Geralyn O'Brien, BPL

Present: Geralyn O'Brien (BPL), Natalie Juhl (DCL), Nora Mercer (MPL), Raquel Metcalfe (SBL), Ginny Mies (SMCL), Mary Kwan (SMPL) Stevie Norman (SSF)

Guests: Vanessa Walden (PLAN), Justin Wasterlain (PLS), Daniel Kith (PLS) Homer Martinez (RCL) Nick Dellaporta (SMCCCD)

- I. Agenda Review- MSP: SBL, SSF
- II. Approval of the Consent Calendar (Action Item) MSP: BPL, MPL
 - a. Minutes from meeting – April 18, 2024
 - b. Circ Manual section 06.01.01 Create Lists – File
 - c. New location code request **4bjpt 4bapt** – MPL
 - d. New loan rules requests - SBL
- III. PLAN Items-
 - a. PLS Delivery Report-Saturday, May 18th North and Central delivery will be cancelled.
 - b. PLAN Report-Temp and Online expired cards older than 3 months will be deleted. Graduate script has been updated. Only Adult cards can use a 01/01/1901, do not use on Juve accounts. Circ Managers should Create a list for Juve accounts to make sure that an accurate birthdate is on the account. Please place a message in the Juve account asking for a D.O.B.

- IV. Action Items
 - a. Held Item Delivery Loan Rules – removing until further notice
 - b. Saved Export Policy – approved in consent calendar 06.01
 - c. Non-circulating loan rule not billing-Loan rule #1 needs to be reviewed and provide the correction form, so items will be overdue after 2 hours
- V. Informational Items
 - a. Loan rules 184 and 185 (ILL Loan Rules and Zero Renewal Policy) – PLAN
 - b. BPL made a request for more County Parks Passes. Is there a way to block the billed passes?
 - c. Do not put items to Claims Return on billed items, patrons should be referred to owning library to reconcile.
 - d. Update your colors on Bibliocommons anytime, you will need to open a help desk ticket.
 - e. Replacement card fee only at SBL is \$3.00
- VI. Circulation Manual in FIDO Update/Review/Approve (ongoing)
 - a. Section 06.05 Sierra Scheduler-Vanessa shared how the scheduler would work, Homer and Vanessa will work together to edit and make sure it makes sense for new and existing Circ Managers.
- VII. Agenda Building
 - a. Loan rule #1 for review-DCL
 - b. County Park Passes-SBL
 - c. Adult Passes I Type-BPL
 - d. Returning school library books for Circ Manual-Homer
- VIII. Announcements

BPL-New Children’s Librarian-Alex Pieredes, DCL is now circulating Explorer Backpack, Belle Haven Community Center Grand Opening on May 18th, MPL Main will be closed Saturday May 18th and Sunday May 19th, Colleges closed from May 25-Reopen June 10th, CSM last minute technology returns May 28, 29th 10am-2pm, CSM will be getting new 3D printers soon, all are welcome to use, Nick will email details to anyone interested. SMCL-Outpost is open at Sanchez library.
- IX. Public comments: Individuals are allowed three minutes, groups in attendance five minutes. It is system policy to refer matters raised in this forum to staff for further investigation or action if appropriate. The Brown Act prohibits the Circulation Managers from discussing or acting on any matter not on the agenda pursuant to state law.

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Next Meeting: June 20, 2024

Recorder: SSF

Next Admin Council Meeting: June 6, 2024

Recorder:

RCL - January 2024

SBL - February 2024

SMCCCD - March 2024
SMCL - April 2024
BPL - May 2024
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01.03 PLS Circulation System Managers Procedures (rev. 6/3/24) draft

FIDO and ILS Access and Privileges

Access and privileges to specific circulation functions are shared among the PLS jurisdictions. In general, all members of a library circulation team should have privileges and access to read the postings and materials available on FIDO. PLS Circulation Managers are responsible, by initiating a work order, for letting PLAN know who needs what access and privileges locally. In order to avoid misunderstandings, inaccuracies, and duplication of work, access and privileges for uploading information, editing, and creating new material are assigned specifically.

Whenever there is a new member to the committee, or if a member leaves the committee, changes to permissions are initiated by the PLS Circulation Systems Managers Chair.

FIDO

Meeting Minutes: Uploading and editing access is limited to the PLS Circulation System Managers. Minutes are uploaded directly from the meeting; changes to prior meeting minutes are included in the following meeting minutes and approved during a regular meeting. (For details, see section 01.02 PLS Circulation Systems Managers Meetings.)

Circulation Managers Manual: Editing access is limited to members of the PLS Circulation System Managers Committee **who attend the meeting regularly**. Most revisions, additions and deletions to the Circulation Manual must first be approved at a PLS Circulation System Managers Committee meeting. The following sections to the Circulation Manual do not need committee approval and should be updated as needed:

- 01.01.01 PLS Circulation and Overdues Contacts
- 01.01.02 PLS Circulation System Managers
- 02.04 PLS Table of Loan Periods and Fees
- 02.05.01 PLS AV Snag Contact List
- 12.04 Downtime Phone Tree

Financial Debt Folder: Access is limited to PLS Administrative Council members and PLS Circulation System Managers **who attend the meeting regularly**. Most revisions and additions must first be approved at a PLS Circulation System Managers Committee meeting.

PLS Help Desk and ILS Tools: Access is limited to the PLS Circulation System Managers or designated staff. Before submitting a Help Desk ticket, staff should first contact the Circulation Manager or designated staff so that PLAN is not inundated with

multiple tickets. Access is also needed to ILS Tools ~~and Library Tools to order AMH supplies and library patron cards and~~ to change library hours, including holiday closure dates, on the general PLS website.

ILS

Only PLS Circulation System Managers **who attend the meeting regularly** are provided access to the Days Closed and Hours Open tables within the ILS. No other logins, regardless of level, have this permission. For more details, see section 01.06 PLS Library Hours and Holidays.

Only PLS Circulation System Managers who attend the meeting regularly will be assigned the permission for Manage Holds to batch update the hold pickup date for items that are currently on the hold shelf. This function would be useful if libraries close.

Access to marking items belonging to other jurisdictions as missing is provided through a special high-level login. Access is limited to the PLS Circulation System Manager **who attend the meeting regularly**.

Jurisdictional

Each jurisdiction is represented on the PLS Circulation Managers Committee. That individual, the circulation manager regardless of local job title, is provided access and privileges to FIDO and the ILS as per Committee membership. Further, the designated manager will be added to the Committee listserv. The Committee Chair will initiate the access with PLAN.

~~Within each jurisdiction, the Circulation Manager is usually the direct contact with Unique Management Services (UMS) and is assigned administrative access as well. However, there may be other designated staff who also have access to UMS. The library's director or designated staff could submit a request for login and password directly to UMS.~~

Within each jurisdiction, the Circulation Manager is given access to Bibliotheca's Command Center module to run statistical reports and check the status of equipment. (See section 11.01 Command Center Instructions – Bibliotheca)

List of other duties for the Circulation Managers representative include:

1. Attend all Circulation Managers Meetings or provide an alternate as needed.
2. Submit requests for new codes or revising existing codes: itypes, loan rules, location codes and patron types.
3. Propose changes to patron notices to the PLS Circulation System Managers.
4. Run reports from section 01.10 Reports Calendar.

For a complete list of duties, see section 01.01 PLS System Managers Decisions.

Barcode Label and Patron Card Orders

Libraries are responsible for ordering their own library cards and item barcodes. See the PLS Vendor list for a list of suggested or recommended vendors. Open a PLS Help Desk ticket to obtain the range of barcodes needed. ~~When logging into the PLS Help Desk, select Library Tools. There is a list of vendors and instructions for ordering library cards and item barcodes. For access to Library Tools or other questions, PLS Circulation Managers will contact PLAN staff.~~

Barcode Label Agency Prefixes

Barcodes beginning with a **2** are patron barcodes; barcodes beginning with a **3** are item barcodes. Each agency is identified by a different prefix in the barcode, which follows the initial patron or item designation. Agency prefixes are:

9041	or 9731	San Mateo County
9042		Burlingame
9043		Daly City
9044		Menlo Park
9045	or 9735	Redwood City
9046		San Bruno
9047		San Mateo City
9048		South San Francisco
9366		Canada College (no longer in use)
9367		College of San Mateo (no longer in use)
9368		Skyline College (no longer in use)

01.05 PLS Interlibrary Delivery System (rev. 6/3/24) DRAFT

Delivery

PLAN operates a delivery system using sorters, drivers and trucks to deliver items to and from libraries Mondays thru Fridays (as of January 2021, only RCL and SMCL libraries are receiving Saturday deliveries). PLS Delivery moves books, DVDs, periodicals, pouch mail, and miscellaneous materials that libraries borrow from or lend to each other in PLS, as well as materials borrowed at one library that are returned to another PLS library. Most PLS libraries receive a delivery daily. Monday through Saturday deliveries should arrive in each library along a pre-established route at approximately the same time every day, road and weather conditions permitting (see Delivery Routes below). Outgoing bins from each library are delivered to 125 Lessingia Court, San Mateo, for sorting on the Automated Materials Handling system (AMH) at County Central. After sorting, bins are put in trucks for delivery to the proper library according to an established route. A number of libraries pre-sort bins for delivery to the next stop along the route. (These pre-sorted bins are not resorted on the AMH.) The goal is to assure that materials take 4-5 days to go from one library to another.

Delivery Decisions

Per the September 21, 2017, PLS Circulation Managers Meeting Minutes, any proposed changes to the delivery system will be presented first at a PLS Circulation Managers meeting before any implementation.

Delivery Preparation

All materials should be securely packed in PLS delivery bins. Materials should not be filled higher than **three (3) inches below top of bin** so that bins are not too heavy to lift; bin lids close properly and stack safely. Smaller items should not be used to fill voids in bins as this makes bins too heavy to lift. Items sent to fill holds at other libraries should be placed in separate bins labeled Transit Holds. Outgoing bins should be stacked in a designated pickup/delivery area that is easily accessible to the drivers. All Transit tag labels should be inserted in the plastic pockets. Routing slips (such as BALIS) should never be inserted in the plastic pockets. Bins should be stacked with the labels being visible to drivers and staff.

All materials in the delivery bins should have a Transit or Transit Hold slip inserted securely in the item, e.g., in the middle of the book or snapped into a CD case, telling the sorter where the item should be delivered. Never tape slips directly on to library material as it may damage the item when removed. When needed, place a rubber band around the item and tape the slips to the band. The library location should also be clearly visible. The labels are especially needed when the AMH is down at

County Central. All libraries should be using print templates so that all Transit and Transit Hold information appears on the top of the slip, not the bottom.

Exceptions to using transit slips:

1. For those libraries, who use a dedicated bin on the AMH, the Transit or Transit Holds slips are not required. These items will be delivered directly to the owning library and will not be processed by the AMH at County Central.
2. For those libraries (not using a dedicated bin on the AMH or do not have an AMH) using pre-sorted PLS bins to a specific library, the Transit or Transit Holds slips are not required. These items will be delivered directly to the owning library and will not be processed by the AMH at County Central.

Transit labels and PLS transit pads can be obtained from PLS offices. This also includes transit pads to other libraries in the bay area (such as BALIS, South Bay, etc.). To order more transit supplies, send a request to pls-administrator2@plsinfo.org.

Orange Pouch

Effective January 2018, each PLS branch is assigned two orange pouches, one for outgoing deliveries and one for incoming. The incoming and outgoing pouches should always have the owning library's label showing in the plastic holder. Items placed inside the pouch are those items that should not be checked-in using the AMH at County Central. (For example, a book-on-cd with a missing disc that also has existing holds, an interlibrary loan to a college, etc.) A goldenrod PLS routing slip or blue Manual Check-In slip should be used to identify where the item(s) is/are to be delivered and who is sending the item(s). The library location should also be clearly visible. The pouches are to be placed on top of outgoing or incoming bin. In the absence of a pouch, staff can use a routing envelope with the appropriate PLS transit tag secured to it.

Incoming Delivery Preparation

As incoming deliveries are processed, staff will remove all incoming labeling on the bins. The tags have printing on both sides and are reusable. Extra tags can be sent back to PLS Deliveries inside the orange pouch. Zip ties are rubber banded and sent back to PLS Deliveries in the orange pouch. Empty bins should be nested-and stacked in a designated place.

Tote Check-Ins Server (TCS)

As of January 2020, PLS is using Tote Check-ins for participating libraries. The TCS website is accessed on check-in terminals for those libraries. As items are checked-in at the County Central AMH, a manifest is created for all items placed inside one PLS delivery bin. Once filled, the bin is closed and a zip tie attached. At the receiving library,

the totes are checked-in **first** by entering the affixed barcode number (found under the lid) using the TCS website. Once the tote is checked in, items' statuses are updated in the ILS and can be processed accordingly. Exceptions (such as holds, cancelled holds, items that need to be redirected to a different library, etc.) will appear on the screen. Those items will need to be checked in via the ILS to print a transit or hold slip. If the barcode under the bin's lid is not entered in the TCS server, then the tote remains active and will need to be cleared manually every 2-business days for those libraries open Mondays and Thursdays (3-business days for those libraries open fewer days). Active totes cannot be reused by PLS Deliveries until cleared. This causes delays with the deliveries. To participate in TCS, libraries will need to contact PLAN and PLS Delivery.

College Items and Inter-Library Loans

As of January 13, 2020, the community colleges in San Mateo County began using their own ILS (Alma) and items were removed from the public libraries' ILS. However, the colleges are still using PLS delivery services for transfers of returns and holds among the colleges and the public libraries. Because neither Alma nor Sierra print traditional transit or hold slips, there are blue Manual Check-In Transit Slips for college-public library transfers and white SMCCD Transit Slips for inter-college transfers.

Each transit slip has a place to indicate whether the item is a courtesy return or a hold/inter-library loan. Returns remain checked out to the patron's library account until the items arrive at the owning library. Staff must write in the Date Returned on the slip so that the owning library can backdate the items before check-in so that the correct overdue fines are assessed. The blue and white slips are also used by the PLS Sorters so that the items are not checked-in on the AMH at County Central. Items are to be placed in the outgoing PLS deliveries bins. There is no need to use a separate bin.

Inter-Library Loans (ILL's) between colleges and public libraries are sent in the PLS Deliveries. Staff fill out the blue transit slip, circle WorldShare and insert the slip into each item. Items are placed in a manila envelope and placed inside the outgoing orange pouch. If the pouch is full, then envelope is placed in the Transit Holds bins. Because ILL's are holds (even when returning to the owning library), all ILL's are placed in the outgoing orange pouch. If full, then the manila envelope is placed in the Transit Holds bins.

Delivering Non-PLS Materials

Announcements: Occasionally, an outside agency will ask to have announcement flyers or other promotional material routed to each library in PLS for posting. PLS provides this as a community service to non-profit agencies in our area. Each item must have the location code of the destination library clearly indicated for ease with sorting. Multiple announcements may be bundled together, though bundles should not exceed 1.5 inches high.

Other Systems: PLS has cooperative agreements with neighboring library systems who are members of Pacific Library Partnership (PLP) to deliver each other's materials using the following routing slips: BALIS (Bay Area Library & Information System), MOBAC (Monterey Bay Area Cooperative Library System) and SVLS (Silicon Valley Library System) and college libraries in San Mateo County (see above section College Items). LINK+ items are also sent using PLS Deliveries. Materials for outside systems and locations need to have shipping tags attached securely to the outside of the item before placing them in the PLS delivery bins. (To order non-PLS tags, send a request to pls-administrator2@plsinfo.org). PLS sorters will then deliver items to the designated agency.

The PLP routing slips are never attached to the outside of an outgoing PLS bin. If there are multiple items being sent to the same PLP location, items can be placed in a small box with one label attached visibly on the outside of the box. The smaller box can then be placed inside a PLS bin. Items can be sent with individual PLS routing tags secured to the outside (similar sized items can be rubber-banded together but do not create large stacks of items) or placed in several routing envelopes with routing slips secured to each envelope.

Miscellaneous Items: Occasionally, PLS libraries need to send boxes or packages to other PLS locations. Staff will fill out a green PLS Special Delivery slip and indicate on the slip if the item(s) can be delivered At Driver's Convenience or if the item(s) are Time Sensitive. Also, indicate which jurisdiction will be billed for the service. PLS will try to accommodate the request(s) but keep in mind that trucks are usually full Mondays-Wednesdays and after holidays. For more detailed information, see section 01.05.01 PLS Special Delivery Shipping Guidelines.

Accepting Out of System Returns

PLS libraries do not accept out of system returns **nor returns belonging to public/private schools** unless the patron is not present. (Exceptions: ILL's and Link+ items are returned to the library where originally borrowed.) Each jurisdiction is responsible for returning items via U.S. mail or when possible, through the PLS delivery system **using the appropriate routing slips**. (See Other Systems above). **For example, if a book belonging to a San Bruno School is returned to Burlingame Public Library, Burlingame Library is responsible for mailing the book back that school. It is not sent to San Bruno Library.**

Delivery Routes (as of 2/2/23)

There are three main delivery routes: North, Central and South. Drivers begin their deliveries around 6:30am and finish about 1pm, Monday through Friday, weather and traffic permitting. In addition, service is also provided to the Silicon Valley Cooperative Library System.

(As of 1/19/23, Westlake Branch Library (WST) is receiving delivery services Tuesdays thru Saturdays.)

North Route	Central Route	South Route
CCO	CCO	CCO
HMB	BEL	SCL
SNZ	BPL	RSH
PAC	EAS	RCL
SKY (Tues & Fri)	MIL	SHB
SBL	FOS	NFO
SSF	MAR	ATH
GRA	PLS	MPL
Break	Break	MPB (Thur & Sat)
BRI	HIL	Break
BAY	SMP	EPA
JDD	CSM (Tues & Thur)	PVL
WST (Tues-Sat)	CCO	WDS
SRM		CAN (Mon, Wed, Fri)
CCO		CCO

SATURDAY DELIVERIES

North/Central Route	South Route		
CCO	SCL		
BEL	RSH		
FOS	RCL		
BPL	SHB		
EAS	NFO		
MIL	ATH		
HMB	MPL		
Break	MPB		
SNZ	Break		
PAC	EPA		
BRI	PVL		
WST	WDS		
CCO	CCO		

03.04 PLS Patron Entry Protocols (rev. 6/7/24) draft

For public libraries in San Mateo County

In the ILS, patrons are registered using templates of home libraries. The library card issued is based on the home (residential) address and not the mailing address. Upon determining the patron's residence, it is important to select the corresponding template from the new patron templates pull down menu. The system will prompt for most of the entries in a template. The templates have the appropriate PTYPE, P4 code, expiration date and **home** library codes already entered but can be modified as needed. If a template does not exist, then the nearest matching template is selected and the appropriate fields will need to be update.

Currently, the expiration date on patron templates are updating daily using a script written by PLAN staff. Most templates expire in three years. Templates with the patron type ONLA expire in 90 days and TEMP in 3 months. If a new template is created, contact PLAN staff using PLS Helpdesk so that it is added to one of the renewal scripts. For more detailed information on patron types, see section 02.072 New Code Request From, Table 2 – P-Types.

At the November 21, 2019, PLS Circulation Managers meeting, we agreed that all patron templates prompt for Language since ITiva now supports Spanish notices. In addition, print and email notices are available in English, Spanish and Chinese. We also agreed to set the Notice Preference field to "NONE" as the default on all patron templates.

At the February 4, 2020, PLS Administrative Council Meeting, it was agreed to remove all data from the following fields in the patron record: driver license (field U), student id (field R), Other ID (field K) and alternate ID (field S). In addition, no social security numbers are to be entered in the patron record. Identification numbers are also to be removed from any other field, such as Notes (field X) and Messages (field M). PLAN will remove all data by March 11, 2020, and will periodically monitor patron records and immediately delete any personal identifying information. At the PLS Circulation Managers Meeting on February 20, 2020, we agreed to remove the fields from all patron templates. **At the PLS Circulation Managers Meeting on January 15, 2024, we agreed to relabel the fields that are no longer in use as "do not use".**

At the October 6, 2022, the PLS Administrative Council approved the use of Preferred Name (Name) and Legal Name on all ILS patron records. For more information, see section 03.04.01

If Circulation Managers need to update the expiration dates manually on an individual template, the SCIRC passwords is needed. To update expiration date:

1. Pull down the Admin menu; select settings.
2. Click on the templates tab.
3. For record type, select Patron.

4. The left hand box will have all the templates used at your library. The right hand box will have all the templates.
5. Double click the template to be changed.
6. Change the date in the expiration box appropriately.
7. Click the “save” icon at the top of the page. That’s it.

The agreed protocols for registering patrons follow.

03.07 PLS Patron Database Management (rev. 6/7/24) draft

Maintenance:

Circulation Managers are responsible for maintaining the integrity of the patron database. There are a number of Create Lists that should be run to assure the accuracy of patron records. Examples can be found in section 6 Create Lists.

Patron Privacy:

At the February 4, 2020, PLS Administrative Council Meeting, it was agreed to remove all data from the following fields in the patron record: ~~driver license (field U)~~, student id (field R), Other ID (field K) and alternate ID (field S). In addition, no social security numbers are to be entered in the patron record. Identification numbers are also to be removed from any other field, such as Notes (field X) and Messages (field M). PLAN will remove all data by March 11, 2020, and will periodically monitor patron records and immediately delete any personal identifying information. At the PLS Circulation Managers Meeting on January 15, 2024, we agreed to relabel fields R, K and S as “do not use”

Purging (approved by Administrative Council on 8/1/13):

Circulation Managers direct PLAN to purge the patron database after the due date of the annual State Report. Currently, patron records are purged in January of each year. Prior to the purge, Circulation Managers may ask PLAN to create reports or lists of patrons with particular profiles, such as owing over \$100.00.

There are two patron purges that need to be run annually. The first purge is of uncollectable accounts of over 7 years old. Uncollectable accounts can also exist on patron accounts that have not yet expired. (In these cases, the charges are purged but the patron account is not purged.) Once this purge has been completed, the second purge is of expired accounts for three or more years. The two purges are done in this order so that expired uncollectable accounts are purged with the second purge.

PLAN is asked to purge patrons whose cards:

#1. Purge of Uncollectable Accounts over 7 years old is run first. ~~PLAN first runs a report in order to sync records with Unique Management Services. (Effective June 15, 2016, we no longer credit report library accounts.)~~ Effective July 1, 2024, we are no longer submitting library accounts to Unique Management Services for collection services.

Example: In 2025, uncollectable accounts that expired in 2017 and prior will be purged.

#2. Purge of Expired Patron Accounts – This report is done after the purge of uncollectable accounts so that all expired accounts are purged. ~~By the second purge, those uncollectable accounts that had been submitted to Unique Management Services are no longer in collection.~~ The criteria for the second purging:

- A. Have expired for three or more years (Last Circ Activity date is ignored) *and*
- B. Have a financial balance of fees of \$25.00 or less (no billed items) *and*
- C. Are currently not in collection status.

Example: In 2025, expired accounts from 2021 and older will be purged.

Expired accounts with \$25.00 or less will become uncollectible accounts after 7 years.

Purging Fines Paid History:

Fines Paid data (e.g., paid fines and fees) is not kept longer than two fiscal years (July 1 to June 30). PLAN will download the data from the ILS and upload it to the debt folder on Fido on an annual basis. The Fines Paid history is cleared by fiscal year July of each year.

Example: In July 2025, Fines Paid data from fiscal year 2023/2024

Purging Expired TEMP and ONLA Accounts:

PLAN has created and implemented an auto-delete script to purge library accounts with p-types TEMP and ONLA. The PLS Circulation Managers agreed to the following criteria for purging:

1. Account should be expired for 90 days.
2. Have no fines current items checked out.
3. Have billed items on the library account.
3. Have no holds.
4. Only the temporary number is found in the barcode field.

04.01 Establishing ~~Fines and~~ Fee Structure (rev. 6/7/24) draft

Financial Policies

Process: Circulation Managers determine and propose to the PLS Administrative Council procedures for assessing ~~fin~~ fees. After review and approval by the PLS Council, Circulation Managers implement the standards and incorporate them into the PLS Circulation Managers Manual. Any changes ~~to in fin~~ fees must be approved by the Administrative Council and the various members of the Joint Powers. ~~Fin~~ **Fees** are reviewed periodically, but particularly when PLS adopts a new integrated library system. New systems typically require re-programming of fines and fees.

The Loan Rule Determiner Table: ~~In the ILS, fines are based on loan rules.~~ Loan rules are invoked through the Loan Rule Determiner Table. A combination of the type of item (ITYPE), e.g., book or AV, the patron (PTYPE), e.g., adult or juvenile, and the location (LOC CODE) e.g., ~~non-holdable high~~ **non-holdable high** or non-circulating, selects a specific loan rule.

~~Different patron types (PTYPE) are associated with different fines, e.g., REG, GSP or INTER. Different items (ITYPE) have different fines associated with them, e.g., media, adult or juvenile. Different items (LOC CODE) are associated with different locations, e.g., reserve, reference, circulating. The Loan Rule Determiner Table invokes the due date and fine structure based on those three aspects. As an example if:~~

PTYPE	&	ITYPE	&	LOC CODE	Then...	Loan Rule is
GSP		adult item from		MIL		3 wk, no fines
REGJ		any item from		BPL		3 wk, no fines
REGA		juvenile item from		SSF		3 wk, \$.15 daily
REGA		adult item from		SBLREF		Library use only

~~Fines (set up in each loan rule):~~

- ~~1. Adult items accrue higher fines than juvenile items.~~
- ~~2. Overdue fines do not exceed the cost of the item.~~
- ~~3. As of July 1, 2016, juvenile accounts are not charged overdue fines.~~
- ~~4. As of June 1, 2018, the age limit of juvenile accounts is increasing through age 19 (approved by PLS Administrative Council on April 5, 2018).~~

~~Adult items (non AV): \$.25 per day overdue
Juvenile items: \$.15 per day overdue
High Fines Loans: \$1.00 per day overdue
High Fines Loans: \$1.00 per hour overdue
Hourly High High Fines: \$5.00 per hour overdue
Hourly Extremely High Fines: \$60.00 per hour overdue (typically for a laptop)
Maximum accrual of \$8 for adult items and \$4 for juvenile items unless item is price is less than that~~

Fees:

\$2.00 processing fee for billed low price items
\$5.00 processing fee for billed book
~~———— \$10.00 Unique Management Collection charge~~
\$50.00 processing for billed high price items

Structure: ~~Loan rules in the ILS are set up to begin accruing overdue fees on the first day past the due date. The overdue fine posts to the patron's fine screen when the item is returned or renewed. With the exception of college reserve items and some electronic devices, Most items are billed 30 days after the due date. If the item is returned 30 or more days after the due date, the overdue fine maximum on an adult item is \$8.00 (-.25/day) or \$3.90 (-.15/day) on a juvenile item. For high fine or hourly loan rules the maximum fine may be higher. The bill includes the cost of the item plus the processing fee. The cost of the item is drawn from the item record. If the item record has no price, the price is drawn from the default price in the loan rule. If the item is returned, the cost of the item and the processing fee are subtracted from the total owed, and the maximum overdue charge, \$8 for an adult item (\$3.90 for a juvenile item), is added back in. Some hourly loan rules may also have a "Replace Bill Service Charge" that is assessed in addition to any overdue fines. If the item is not returned, the patron's account may be sent to a collection agency, Unique Management Services (for more details, see section 04.04), approximately 60 days after the due date, and a \$10 collection fee is assessed on the patron's record. If the item is returned after the account is sent to collection, the patron is responsible for both the \$8 (or \$3.90) maximum overdue fine and the \$10 collection fee.~~

04.07 Paying Bills **Fines** and Fees (rev. 6/7/24) draft

PLS patrons may return PLS items and **pay any bills fines** or fees at any PLS library or online. **Replacement charges Fines** and fees collected in person for another library remain with the library where they were paid. **Replacement charges** and fees paid online are returned to the owning library.

Paid **replacement charges fines** and fees are reconciled in the FINES screen on the patron account within the ILS, which also generates patron receipts. A history of fine payment by the patron is located in the "Fines Paid" button. The history is purged after two years. When a billed item is paid, the ILS will automatically change the item's status to "Lost and Paid".

Limits: Patrons owing more than **\$50** are blocked from further borrowing and remote services. Patrons with more than 50 items checked out may not borrow additional items without override approval.

Claims Returned: (also see section 02.08 Claims Returned) Patrons may say they have returned an item that has not been checked in and cannot be found on the shelf. Noting an item **as is** "Claims returned" shows in both the patron and the item record. Once the item is checked in, those notes will be removed by the system. However, the patron record will keep a running tally of the number of claims returns the patron has made. **Billed items are not marked as Claims Returned. The patron is referred to the owning library for further follow up.**

Changing the status to "claims returned" is done in the patron's record, on the checked-out items tab. Select the claimed item, choose the *Claim Returned* button, choose the appropriate date (or blank date), and OK. Three options are offered:

Check in items (with no fines) and change status to MISSING. The item is removed from the patron record and outstanding fines and bills are waived. If there are outstanding holds on the item, there will be a prompt to cancel the holds.

Check in items (with no fines) and change status to CLAIMS RETRND. The item is removed from the patron record, outstanding fines or bills are waived, and there is no prompt to cancel holds.

Leave items checked out (send overdue notices) and change status to CLAIMS RETRND. The item remains on the patron record and the system will continue to send overdue notices and bills on the original due date schedule.

When coding another library's item Claims Return, always choose the third choice: **Leave items checked out...** Each library may determine which option to check for its own items.

Checking in a **Claims Returned** item generates a verifying note on the screen, and will show in the **Status** column.

Billed Items

One and three week Items that are overdue by 30 days, are assumed lost. The ILS issues a bill to the patron and changes the status of the item from overdue to Billed. The bill for a lost item is the cost of the item, as listed in the item record, plus a processing fee, typically \$2 or \$5, depending on the cost of the item. In the case where no price is listed in the item record, the ILS supplies a default price from the loan rule the item checked out on.

A patron can request a bill for a lost item at any time. The patron does not need to wait until the actual bill is sent. This is done from the patron's "Checked-Out Items" tab. The bill can be created by selecting the item and clicking the tab "Mark Lost Items". The system will generate the bill. The status in the Fines Tab is changed to "LOST". (The item status is changed to "BILLED".) Only use this option if the patron is paying at that time. The ILS will generate a bill to send to the patron.

The patron may return the item or pay for its replacement at any PLS Library. When the item is returned, the bill cleared from the account. (Note: Public library items returned to the colleges are not checked-in until received at the owning library. College library items returned to a public library are not checked-in until received by the owning college library.) ~~reverts to the maximum overdue fine.~~ When a billed item is paid, the ILS will automatically change the item's status to "Lost and Paid".

Refunds: Patrons may not expect a refund on an item that is Lost and Paid from any library other than where the bill was paid. Most libraries will not refund a Lost and Paid item. Please refer the patron to the library where payment was made.

Replacement: Only the owning library can determine if it will accept a replacement in lieu of payment for a billed item. Most libraries do not accept replacement copies. If there are questions, please refer the patron to the owning library's PLS **Circulation Manager**.

06.01.01 Create Lists & Scheduler – Files (rev. 5/31/24) draft 6/5/24

There are a limited number of files available in Create List. Try to select a file that will accommodate your search. Naming a file correctly will hopefully keep it from being deleted or overwritten by mistake.

The agreed naming convention for **Create List files** is to start with the initials of the library running the list, the type of list, staff initials and the date when it can be deleted: e.g., SBL New Patrons Feb 2024 RM 3/25/24. In this example, this file can be deleted after 3/25/24. **The agreed naming convention for Sierra Scheduler is to start with “SCHED”, the jurisdiction or branch initials, the type of list and the date when it can be deleted: e.g., SCHED MPL New Patrons 5/1/24. In this example, this file can be deleted after 5/1/24.**

When there are not enough files available, PLAN is authorized to delete those that have been hanging around for too long, and will look at the deleted date for guidance. If there is no deleted date, a file can be deleted at any time. PLAN does not need to notify staff when this is done.

Tips to remember:

1. If you don't need it anymore, empty a file so that it's available for others.
2. Add a “not needed after” date in the name so that others know they can empty it if you forgot to do it.
3. If you're using a bigger file and you get a few results, copy your results to a smaller file so that larger ones are available as soon as possible.
4. The big files (250,000 and 675,550 records) needs to be exported right away. The file needs to be emptied after 1 day of use. PLAN or staff can overwrite date no matter what “not needed after” date is used.
5. If you cannot find a free file that is big enough, it's ok to overwrite files more than a couple of days old **and** ~~or~~ if there is no “not needed after” date.
6. Consider taking a screen shot of your search info instead of including “DO NOT DELETE” in the name field. This will not keep an old file from being deleted.
7. Saved Files – There is a limit to the number of files for saving Searches, Sorts, Lists and Exports. Due to this limit, only files with at least 5 parameters are to be saved. Files with less than 5 parameters can be deleted by anyone once the file limits have been reached. When saving files, start with the jurisdiction or branch, followed by the date. Staff initials are optional. Examples:

DCL Orders 4/19/24 or 3S Orders 4/19/24

Table 2 - NEW LOAN RULE ELEMENTS FORM

*Please review the Loan Rule Table in the Sierra Circ Client for examples:
ADMIN->PARAMETERS->CIRCULATION->LOAN RULES*

Loan Rule Element	Value
Name (20 character limit)	NON-CIRCULATING
Code	N
Normal Loan Period	0
Holdable	N
Bookable	N
Home Pickup	N
Shippable	N
Ship Time	0
Time Remaining B4 Renew	0
First Renew Period	0
Additional Renew Period	0
Max Number Of Renewals	0
Minimum Use	0
Eligib To Recall	999
Time Return Recall	0
Time to Pickup	0
Max Number of Odues	2
Max Number of Auto Renewals	0
Time First Odue	1
Time Second Odue	1
Time Third Odue	0
Time Fourth Odue	7
Time Fifth Odue	0
Time Sixth Odue	0
Text First Odue	1
Text Second Odue	2
Text Third Odue	0
Text Fourth Odue	0
Text Fifth Odue	0
Odue Penalty	0
Text First OdueR	0
Text Second OdueR	0
Text Third OdueR	0

Text Fourth OdueR	0
Text Fifth OdueR	0
Courtesy Notice Text Number	0
Number of Days Before Odue	0
Time 1st Odue Recall	3
Text Recall Notice	0
Text Pickup Notice	0
Text Cancel Pickup	0
Grace Period For Fines	0
Number Of D/HR 1st F Per	0
Amount Of Fine 1st F Per	0.00
Number Of D/HR 2nd F Per	0
Amount of Fine 2ND F Per	0.00
Limit Fine to Price	Y
Default Item Cost	50.00
Replace Process Fee	5.00
Replace Bill Service Charge	0
Rental Fee	0
Fine Incr If Recall	0.00
Msg Fines	0
Msg Bill	3
Msg Adjustment	0
Rental Circtext	0
Penalty Incr If Recall	0