

PLS CIRCULATION MANAGERS MEETING

AGENDA

July 18, 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: Jon Jung, SMP

- I. Agenda Review
- II. Approval of the Consent Calendar (Action Item)
 - a. Minutes from meeting – June 20, 2024 (pg.4-7)
 - b. New iType Request – AD Park Passes (pg. 8-9)
 - c. New iType Request – JUV Park Passes (pg. 10-11)
 - d. Circ Manual - 03.01 Patron Library Cards (pg. 12-14)
 - e. Circ Manual - 03.04 Patron Entry Protocols (pg. 15-16)
 - f. Circ Manual – 04.01 Establishing Fee Structure (pg. 17-18)
 - g. Circ Manual – 04.02 PLS Patron Notices and Notice Preference (pg. 19-23)
 - h. Circ Manual – 04.02.01 PLS Text of Circulation Notices (pg. 24-35)
 - i. Circ Manual – 04.04 PLS Notice Cycle (pg. 36-37)
 - j. Circ Manual – 04.07 Paying Bills and Fees (pg. 38-39)
- III. PLAN Items
 - a. PLS Delivery Report
 - b. PLAN Report
- IV. Action Items
 - a. Mailouts – SMCL

- b. August meeting (cancel?) - SSF
- V. Informational Items
 - a. Update from Raquel regarding the county park passes - SBL
- 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

Next Meeting: August 15, 2024

Recorder: MPL

Next Admin Council Meeting: August 1, 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

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

Hybrid Meeting – Burlingame Public Library,
Upper Level Meeting Room
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Facilitator: Natalie Juhl, DCL

Recorder: Brian Malibiran, SSF

Present : Geralyn O'Brien (BPL), Natalie Juhl (DCL), Nora Mercer (MPL), Raquel Metcalfe (SBL), Ginny Mies (SMCL), Brian Malibiran (SSF) Jon Jung (SMPL) Fiona Potter (RCPL)

Guests: Vanessa Walden (PLAN), Daniel Kith (PLS) Homer Martinez (RCPL) Scott Young (PLS)

Absent: Nick Dellaporta (SMCCCD)

- I. Agenda Review – Moving action item C to informational items MSP BPL/SMCL Approved by present Circ Managers
- II. Approval of the Consent Calendar (Action Item) MSP MPL/SMCL Approved by present Circ Managers
 - a. Minutes from meeting – May 16, 2024 Mark RCPL as absent.
 - b. Manual - 01.03 PLS Circulation System Managers Procedures
 - c. Manual - 01.05 PLS Interlibrary Delivery System
 - d. Manual - 03.04 Patron Entry Protocols Move to section 6 of the Circ Manual
 - e. Manual - 03.07 PLS Patron Database Management

- f. Manual - 04.01 Establishing Fee Structure Move to section 6 of the Circ Manual
 - g.
 - h. Manual - 04.07 Paying Bills and Fees
 - i. Manual - 06.01.01 Create Lists & Scheduler
 - j. Delete section 04.06 PLS Unique Management Services [UMS or Unique]
 - k. Delete section 04.06.01 Unique Management Services and Debt Collect
- III. PLAN Items
- a. PLS Delivery Report – Nothing to report
 - b. PLAN Report – Nothing to report
- IV. Action Items
- a. Loan rule #1 for review – DCL MSP to make billable. BPL/SBL – Approved by present Circ Managers.
 - i. Making this billable. 139 items are currently using this loan rule. Mostly wifi hotspots. To do a search in Create Lists, use all item location starts with (library) and item loan rule = to 1. Renew the item, or mark the item as lost to get billed status. To find withdrawn and not checked out, search for location starts with (library) and item code 2 and due date not equal to blank.
 - b. County Park Passes – SBL
 - i. Unable to deactivate if it is lost/patron doesn't return. Contact Sarah Jolley for the rep contact. jolley@plsinfo.org Raquel will take this back to Tim and Sarah to order as a consortium and send to executive committee then admin council.
 - c. Adult Passes iType – BPL (moving to informational items)
 - d. PLS Vendor List – Where to place it on FIDO? Should it be a section of the Circ Manual? – RCL MSP BPL/SSF Approved by present Circ Managers.
 - i. Where should this document live on FIDO? Will put this in the quick links and only editable by PLS Circ Manager Representatives. Homer will work with Vanessa to get this uploaded.
 - e. Email subject for the new Sierra notice to distinguish from “Statement of Charges” – PLAN MSP BPL /SBL
 - i. We need two separate two new subjects since we are sending two emails. First is: Long overdue items (60 days) Second is: Statement of charges due. (150 day notice)
- V. Informational Items
- a. Mailout – SMCL
 - i. Opening up EPA mailout, for all county patrons and all PLS items. SMCL will absorb all costs. Patrons would need to have a county card. Possibility to do this PLS wide later in the future. First is recommendation from the Circ Managers, then to Executive Committee, then Admin Council.
 - b. Clearing long billed items - BPL

- i. Over 100 billed items, the ones that say check shelf and PDC. This should be done in a monthly basis. This is in section 03.07, the ones that are returned should have been cleared from PDC. PDC Peninsula Debt Collect. After one year billed, it goes to PDC. After 3 years, it gets withdrawn.
 - c. Adult Passes ITYPE:
 - i. Geralyn will create a new ITYPE. AD passes, and JUV Passes.
- VI. Circulation Manual in FIDO Update/Review/Approve (ongoing)
 - a. 03.04 Patron Entry Protocols
 - i. Homer will try to update this section and bring back to Circ Managers.
 - b. 04.01 Establishing Fee Structure
 - i. Homer will try to update this section and bring back to Circ Managers.
- VII. Agenda Building
 - a. Sections 03.04, and Section 04.01
 - b. ITYPE Passes
 - c. Updates from Raquel regarding the county park passes
 - d. Mailouts
 - e. Cancelling August meeting
- VIII. Announcements
 - a. MPL: New Belle Haven building is open at MPL. SMP 5 new hires. SMCL New librarian recruitment at Access Services. Opening in Children's department as well.
- 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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body of a local agency elects to use teleconferencing, the legislative body of a local agency shall comply with all of the following:

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- (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

02.07.02 New Code Request Form (rev. 8/3/23)

Part I

FORM

Goal: Maintain uniform location codes, patron types, item types and loan rules to better serve the public by standardizing all codes for use by all PLS libraries.

Request Date: 7/10/2024
BPL

Requesting Library: _____

Requestor's email: obrieng@plsinfo.org

- A. Location Code
- B. Patron Type
- C. Item Type
- D. Loan Rule

- E. Patron Code 2

(See section 02.07.02A New Code Request Instructions for detailed information on how to properly format a new code)

Proposed New Code: AD Park Passes

Item Location Label for the Proposed New Code (100-character length max):

This is a new IType that will help the circ statistics findable.

Give detailed answers to the questions for the proposed new code:

A. Location codes: To what library and collection does this item belong? Is this a new location code? Why is it different from the location codes your library already uses? If the proposal uses an existing location code, show how p-types and i-types are affected in the equation that is the LRDT. (Note: As of the 9/17/15 meeting, Link+ location codes are exempt from PLS Circulation Managers approval.)

B. Patron types (P-types): Different patrons have differing privileges. Is this a new p-type? What are the checkout and hold limits for this new p-type? Will the p-type be sent to library materials recovery agency (Collection Agency setting)? How long before this card expires? What makes it different from the other patron types already defined? If the proposal is not for a new p-type, list the p-types that may or may not be included in the LRDT. Include the Patron Block Element Form below when submitting a request for a new patron type.

C. Item types (I-types): What types of material is it – print, media, or equipment? Is this a new i-type? Who may check it out and how long will it be borrowed. Which patrons have privileges to check out this item? Adult, juvenile, nonresident; all patrons or library use only? What makes it different from the other i-types already defined? If the proposal uses an existing i-type, list the patrons and location codes that may or may not be included in the LRDT.

02.07.02 New Code Request Form (rev. 8/3/23)

Part I

FORM

Goal: Maintain uniform location codes, patron types, item types and loan rules to better serve the public by standardizing all codes for use by all PLS libraries.

Request Date: 7/10/2024 Requesting Library: BPL

Requestor's email: obrieng@plsinfo.org

- A. Location Code
- B. Patron Type
- C. Item Type
- D. Loan Rule

03.01 Patron Library Cards (rev. 7/9/24) draft

For public libraries in San Mateo County

ID Requirements

Patrons have an option to open a library account either online or in person at their local public library in San Mateo County. The online patron barcode only allows patrons to place holds on items and to access some PLS shared online databases. **The online patron barcode expires in 90 days.** The library card allows patrons to have full access of their account, checking out items, placing holds, access PLS shared and jurisdictional online databases and to use library owned computers. Library cards issued by any public library in San Mateo County are valid at all public libraries in San Mateo County.

Process: Circulation Managers determine and propose to the PLS Administrative Council standards for patron identification requirements for PLS library cards. After review and approval by the PLS Council, **PLS** Circulation Managers implement the standards and incorporate them into the PLS Circulation Managers Manual.

Policy: There are two identification components necessary to issuing a library card, verification of the individual's identity and proof of current home address. In order for patrons to be issued a library card, they must present:

1. Photo ID with current home address. Typically, this would be a California Drivers' License or ID card.

OR

2. Photo ID and other proof of current home address. Photo ID can include passport, Military ID or school photo ID. Proof of address can be supplied with official mail such as a bill or bank statement. Junk mail does not constitute proof of address. Electronic proof of address is also accepted as long as it is current and has appropriate letterhead.

Any public library in the system may issue cards for all jurisdictions with the ID listed as 1 or 2 above. In the absence of proof of address, local jurisdictions may issue a temporary card that has a 3-item borrowing limit and expires in 3 months. .

In the absence of photo ID, a patron must go to their home library. Issuing a library card is at the supervisor's discretion.

Patron Privacy:

The PLS Administrative Council approved the removal of all personal data from patron records (including data found in **Note** and **Message** fields). PLAN will remove all data by March 11, 2020, and will periodically monitor patron records and immediately delete any personal identifying information such as driver license numbers, other ID, social security numbers, passport numbers, alternate ID or student ID numbers. Circulation Managers will also delete any personal ID data found in **Message** or **Note** fields.

Home Library

Patrons are issued library cards based on where they reside. For example, San Bruno residents are issued San Bruno Library cards, even if they are applying for that card at Menlo Park Library. Belmont residents receive San Mateo County cards, even if they are applying at a Daly City Library. County unincorporated areas receive San Mateo County cards (see exceptions below) [For a list of agency codes, see section 01.04 PLS Agency Codes.] Residents who live outside of San Mateo County are issued a Non-Resident library card at any public library in San Mateo County.

Juvenile Patron Types

Juvenile patron types (p-types) REGJ and NRJ will be assigned to all patrons under the age of 18. (P-types for REGY and NRY for 18-19 year olds are no longer used, per the January 19, 2023 PLS Circulation Managers meeting.) ~~Since we are no longer charging overdue fines, the PLS Circulation Managers agreed to delete p-types REGY and NRY (for 18-19 years old) at the January 19, 2023 meeting.~~ At the June 1, 2018 meeting, the PLS Circulation Managers agreed that all juvenile patron records include a birthdate in the corresponding field in the patron record so that PLAN can use a script to update automatically juvenile p-types to adult p-types at age 18. **The default birthdate is not used on juvenile accounts.**

Exceptions

Hillsborough residents – If the issuing library is San Mateo or south of San Mateo, a San Mateo library card is issued. The patron type (p-type) is 7REGA or J, home library 7S and Direct Loan Code is 4 Hillsborough/SMP. If the issuing library is Burlingame or north of Burlingame, a Burlingame library card is issued. The p-type is 2REGA or J, home library 2B and Direct Loan Code is 3 Hillsborough/BPL.

Colma residents – Patrons are issued a Daly City library card with with ptype 3REGA or J, home library 3S and Direct Loan Code is 9 San Mateo County.

Broadmoor residents – This is a section of Daly City/ A Daly City library card is issued with ptype 3REGA or J, home library 3S and Direct Loan Code is 9 San Mateo County. A note is entered stating BROADMOOR.

Renewing Library Cards

Library cards can be renewed in person or by phone. (Per the PLS Circulation Managers January 15, 2015), we agreed that if a patron calls by telephone to renew his/her account, staff can do so only if the patron gives you the current information on the account and there are no changes. Photo ID and proof of current home address is needed whenever there is a change to the patron record. Staff will reissue correct library cards and update patron types, home library and direct loan codes as needed. If a juvenile is 18 -19 years, the patron type is changed to young adult status. If the patron is 20 years old or older, the patron type is changed to adult status.

Expired Library Cards in Collection

~~Per the PLS Circulation Managers February 21, 2008 minutes, the PLS Administrative Council decided that library cards that are in collection cannot be renewed until resolved.~~

~~Note: See section 04.02 PLS Patron Notices for notice cycle details.~~

For community college libraries in San Mateo County

Access to the San Mateo County Community College District (SMCCCD) libraries is free and available to all residents.

All current SMCCCD students, faculty or staff automatically have library accounts. No registration or physical card is required. Simply having a college ID or knowing one's ID number (G number) is sufficient for online or in-person borrowing of materials or using databases and other e-resources.

Community patrons may sign up for an SMCCCD library account online or in-person. (See 03.03 Patron Applications)

The community colleges are NOT issuing physical cards. Community patrons may use or request materials online with their user name and password and checkout materials with their public library card or by showing a photo ID.

Community patron accounts expire after one year. Accounts may be renewed by phone or in-person. Accounts are deleted from the system three years after expiration.

03.04 PLS Patron Entry Protocols (rev. 7/9/24) 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 **the codes** 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 a PLS Circulation Manager creates a patron template for temporary use and the template will not be included in the scripts mentioned above, the expiration date will need to be updated manually using their logins. 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.

04.01 Establishing ~~Fines and~~ Fee Structure (rev. 7/9/24) draft

Financial Policies

Process: PLS Circulation Managers determine and propose to the PLS Administrative Council procedures for assessing ~~fines and~~ fees. After review and approval by the PLS Council, PLS Circulation Managers implement the standards and incorporate them into the PLS Circulation Managers Manual. Any changes to ~~in fines and~~ fees must be approved by the Administrative Council and the various members of the Joint Powers. ~~Fines and 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 fines~~ 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

Processing Fees: The processing fee is added to the replacement cost when an item is billed by the ILS or billed manually. The fee that is assessed is part of the loan rule. Processing fees vary by jurisdiction. Some jurisdictions do not charge a processing fee. Some loan rules or jurisdictions assess a higher processing fee.

Fees:

\$2.00 processing fee for billed low price items

\$5.00 processing fee for **most** billed items ~~book~~

~~\$10.00 Unique Management Collection charge~~

\$6.00 processing fee for San Bruno Library items

\$50.00 processing for billed high price items (such as laptops)

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 (if assessed). The cost of the item is drawn from the item record and the processing fee from the loan rule. 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.~~

04.02 PLS Patron Notices and Notice Preference (rev. 7/2/24) DRAFT

The text for all new and existing notices must first be approved by the PLS Circulation Managers Committee. Once approved, the Chair will initiate the work ticket with PLAN. Circulation Managers will also provide text for all Spanish and Chinese language notices. Notices need to be available in all three languages.

Emailed Notices:

1. Contact information can be customized by jurisdiction (phone numbers and email addresses)
2. Additional text can be added to an emailed Hold Pick-Up notice only. However, all the text approved by the PLS Circulation Managers must be included in the notice. The additional text must also be translated to Spanish and Chinese.
3. Exceptions for Hold Pick-Up notices – If there is an unexpected, sudden temporary closure, the hold pick-up notice for the one closed location can be immediately implemented without PLS Circulation Managers Committee. The notice should include most of the approved text. Only text in English is needed.
4. For planned closures, Additional text can be added to an emailed Hold Pick-Up notice. However, all the text approved by the PLS Circulation Managers must be included in the notice. The additional text must also be translated to Spanish and Chinese.

I. PLAN Implementation for all notices

1. Update text for each notice (approved by PLS Circulation Managers)
2. Review & edit notice text
3. Submit to Circ Managers for approval via email. (Exception: Since Hold Pick-Up notices can be customized [see item #3 above], only the requesting Circulation Manager will need to approve.)
4. Requests Spanish & Chinese translations
5. Copy & paste translations into document
6. Sends completed document for inclusion in Circ Manual
7. Solicit contact information from each library
8. Create templates for each notice
 - a. English
 - b. Spanish
 - c. Chinese
9. Tests each notice for formatting
10. Update notice jobs in Sierra

II. NOTICES

Notices are sent to patrons to remind them of overdue items and to inform them that holds are available and ready for pick up or that holds have expired. The ILS uses the NOTICE PREFERENCE box in the patron record to determine the delivery method for each notice. (See section II below for a detailed explanation of the Notice Preference.)

In the absence of an email address, overdue notices are by telephone via TNS (the Telephone Notice System, see section 04.05). The first telephone number listed on the patron's account is used. If a patron prefers mailed notices, the NOTICE PREFERENCE field must say PRINT.

Courtesy Renewal Notices are available only to patrons with an email address or telephone number in their patron records. The Courtesy Renewal Notice is emailed or patrons called, two days before an item is due. The NOTICE PREFERENCE box is set to NONE, PHONE, or EMAIL.

Patrons who respond back to an email from library-notices@plsinfo.org or noreply@plsinfo.org will receive an out-of-office reply indicating the message will not be viewed by staff. The message will be:

Your message will not be viewed by library staff. Please visit <https://plsinfo.org>, click on "My Account" and select your local library to find contact information for your library. Thank you.

Patrons have the option of using SMS Text Messaging in addition to other notices. For more information, go to <http://www.plsinfo.org/texturlib>.

All billing notices are printed, no matter what is entered in the NOTICE PREFERENCE field.

All printed notices are mailed by Unique Management Services (UMS).

See section 04.02.01 PLS Text of Circulation Notices for the text of all current notices.

STATEMENT OF CHARGES NOTICES (MAIL ONLY) EMAIL

There are two Statement of Charges notices mailed to patrons. For UMS to distinguish the two notices, the 60-day notice is named "Long Overdue Items" and the 150-day notice is "Statement of Charge".

A. The first notice is sent at 60 days overdue. The patron must have one billed item or one manual charge at least 60 days overdue AND must owe \$50.01 or more, including manual charges.

B. The second notice is sent at 150 days overdue. The patron must have one billed item or one manual charge at least 60 days overdue AND must owe \$50.01 or more, including manual charges.

Statement of Charges are compiled monthly on the first Monday of each month. Notices are mailed on the first Monday, except for PLS holidays when notices are mailed on the following Tuesday. The notices are sent only to patron who have checkouts or charges that go 60 or 150 days overdue in the previous month. Patrons will be mailed either the 60-day or 150-day notice in the same month, whichever is later, not both. Patrons may receive notices in multiple months if they have checkouts or charges that have different due or assessed dates.

EXPIRING LIBRARY CARD NOTICES VIA EMAIL or TEXT

30 Patrons are emailed and/or notified by text that the library card is expiring within 30 days. An email or text is also sent when the library card has expired.

For more information on renewing library cards, see section 03.01 Patron Library Cards.

TEXT MESSAGES FOR BILLED ITEMS

Patrons are notified by text if an item is billed on their account. Billed items are more than 30 days overdue.

FROZEN/PAUSED NOTICES VIA EMAIL

Patrons who have frozen/paused holds on their library accounts will receive a reminder 30 days before the hold expires.

EXPIRING HOLDS VIA EMAIL

Patrons will be emailed a reminder 60 days before a hold expires. Frozen/paused holds will be excluded since patrons have already received a reminder regarding these holds. PLAN will use a script to email this notice to patron. The script will also be available in Spanish and Chinese.

AUTO RENEWAL FEATURE

The Sierra's Auto-Renew Feature was implemented in September 2019. Items will renew 2 days before the due date. The new due date will be calculated on the existing due date not on the day the item is renewed. Patrons cannot opt-out of Auto Renewal.

Notification will be made by email, text and telephone. Patrons will receive notification of titles that were renewed, including the new due date, and a list of titles that could not be renewed due to renewal limits, existing holds or a non-participating library.

For details on how the script works, see section 02.02 Renewals.

For information on the notice cycle, see section 04.04 PLS Notice Cycle.

III. HOW THE ILS USES DELIVERY PREFERENCE TO SEND NOTICES

When notices are generated, the ILS uses each patron's notification preference, if any, to determine the delivery method for each notice. At the November 21, 2019 PLS Circulation System Managers meeting, it was agreed the patron templates should be defaulted to NONE in the Notice Preference field. By doing this, the ILS will automatically send notices in the following order:

1. Email
2. Phone
3. Print

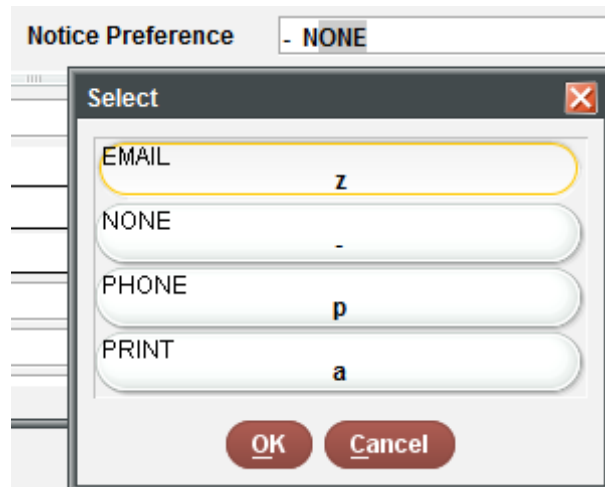
If the ILS is unable to send a notice to a patron via email, (e.g., the patron record has no email address or the email address does not contain the "@" symbol) the ILS attempts to send notices via telephone notification. If the ILS is unable to send the notice to the patron via telephone notification (e.g., the patron record has no telephone number, the telephone number is formatted incorrectly, no one answers the phone call, etc.) the system sends the notice to the printer. Note: If someone answers a phone call and then hangs up the phone, the ILS may interpret this as a successful phone call and no printed message is sent.

If the option for Print is selected, then the patron will not receive any Courtesy Renewal notices. In addition, overdue notices will be mailed according to the notice cycle, meaning overdue fines will be accumulating until items are renewed or returned. (See section 04.04 PLS Notice Cycle for details).

If the option for Phone is selected, then the patron will only receive telephone messages even if there is an email in the patron account.

If the option for Email is selected, then the patron will only receive email messages. If the email address is not current, entered incorrectly or properly formatted, then the patron will not receive any messages.

The ILS will ignore the Notice Preference when sending out bills to library patrons. All bills are printed and mailed.



04.02.01 PLS Text of Circulation Notices (rev. 7/2/24) DRAFT

Any changes to the text of notices must first be approved by the PLS Circulation Managers Committee. Once approved, the Chair will initiate the work ticket with PLAN. The Circulation Managers are also responsible for translating the notices to Chinese Traditional and Spanish.

Go to 04.04 PLS Notice Cycle for details on when notices are sent.

I. Sierra Notices

Library notices are sent based on the Notice Preference (See section 04.02 PLS Patron Notices and Notice Preference for details.) and Preferred Language fields in the patron record. There are three languages available for mail and email: Chinese Traditional, English and Spanish. Telephone notifications are only available in English and Spanish.

At the July 15, 2021, PLS Circulation Managers meeting agreed to change to Print Templates to mail and email our notices since notices used by Sierra are limited to line numbers and characters per line.

All mailed and emailed notices will include the patron identification number (listed as Account #). For mailed notices, the text "Please do not respond to this message. Thank You." will not be included. For emailed notices, the text "Your library's contact information is found on the reverse side of this notice." will not be included.

Unique Management Services (UMS) is contracted to mail out our printed notices. Since UMS cannot distinguish the differences in the notices: hold expired, last copy unavailable or expired from the hold shelf, only one printed notice can be sent.

Only overdue and hold notices are available by email. Bills and both Statement of Charges notices, are sent by mail. PLAN staff will format notices as needed. All printed notices are mailed by Unique Management Services (UMS).

The Sierra notice numbers are based on Text of Circulation Notices Table.

1. First Overdue

Printed Notice:

**** First Library Notice ****

The following item(s) is(are) overdue. There may be additional titles not listed below. If you need to renew the items, visit <https://plsinfo.org>, click on “My Account”, select your local library and log into your account. If you have returned the item(s), contact your local library. Your library’s contact information is found on the reverse side of this notice.

Emailed Notice:

**** Library Notice ****

The following item(s) is(are) overdue, There may be additional titles not listed below. If you need to renew the items, visit <https://pls-parent.bibliocommons.com> and click “Log In” to log into your account.

If you have returned the item(s), please email us at jurisdiction@plsinfo.org [or,] call us at (650) XXX-XXX [or] text us at (650) XXX-XXXX.

Please do not respond to this message. Replies will be delivered to an unmonitored mailbox. Thank You.

2. Second Overdue

Printed Notice:

**** Second Library Notice ***

The following item(s) is(are) now very late. There may be additional titles not listed below. If you need to renew the items, visit <https://plsinfo.org>, click on "My Account", select your local library and log into your account. If you have returned the item(s), contact your local library. Your library's contact information is found on the reverse side of this notice.

Emailed Notice:

**** Second Library Notice ***

The following item(s) is(are) now very late. There may be additional titles not listed below. If you need to renew the items, visit

<https://pls-parent.bibliocommons.com> and click "Log In" to log into your account.

If you have returned the item(s), please email us at jurisdiction@plsinfo.org [or/] call us at (650) XXX-XXX [or] text us at (650) XXX-XXXX.

Please do not respond to this message. Replies will be delivered to an unmonitored mailbox. Thank You.

3. **Bill** (print only)

**** Bill for Replacement Cost of Library Items****

Item(s) on your account is(are) over 30 days overdue and is(are) billed to your account. Please return item(s) and resolve the charges as soon as possible. The total amount due may include charges not listed below. pay online, visit <https://plsinfo.org>, click on "My Account", select your library and log into your account. For any questions, call your library before paying this bill. Your library's contact information is on the reverse side of this notice.

4. **Hold Pickup**

Printed Notice:

**** Hold Pickup Notice ****

We're excited to let you know the item(s) you've been waiting for is (are) ready! There may be additional holds available. For more information, please visit <https://plsinfo.org>, click on "My Account", select your local library and log into your account. For any questions or assistance, call your library. Your library's contact information is on the reverse side of this notice.

Emailed Notice:

**** Hold Pickup Notice ****

We're excited to let you know the item(s) you've been waiting for is (are) ready! There may be additional holds available. You can pick up your item(s) anytime during open hours. Please visit <https://plsinfo.org/whos-open> for library hours.

For questions or assistance, please email us at jurisdiction@plsinfo.org [or/,] call us at (650) XXX-XXX [or] text us at (650) XXX-XXXX. You can access your account at

<https://pls-parent.bibliocommons.com> and click on "Log in" to log into your account.

Please do not respond to this message. Replies will be delivered to an unmonitored mailbox. Thank You.



5. Drop hold - Expired

Printed Notice:

**** Expired Hold Notice ****

Your request for this item has expired. If you wish to borrow this item, you may replace the hold. Visit <https://plsinfo.org>, click on "My Account", select your local library and log into your account. If you would like to pursue other borrowing options, please contact your local library. Your library's contact information is on the reverse side of this notice.

Emailed Notice:

**** Hold Cancellation Notice ****

Your requested item was not picked up in time. If you wish to borrow this item, you may replace the hold. Visit <https://pls-parent.bibliocommons.com> and click on "Log in" to log into your account.

For questions or assistance, please email us at jurisdiction@plsinfo.org [or,] call us at (650) XXX-XXX [or] text us at (650) XXX-XXXX.

Please do not respond to this message. Replies will be delivered to an unmonitored mailbox. Thank You.

6. Drop hold - Unavail.

Printed Notice:

**** Expired Hold Notice ****

Your request for this item has expired. If you wish to borrow this item, you may replace

the hold. Visit <https://plsinfo.org>, click on “My Account”, select your local library and log into your account. If you would like to pursue other borrowing options, please contact your local library. Your library’s contact information is on the reverse side of this notice.

Emailed Notice:

**** Hold Cancellation Notice ****

The request you made for this item has been cancelled since the last copy is no longer available. If you would like to pursue other borrowing options, you may replace the hold. Visit <https://pls-parent.bibliocommons.com> and click on "Log in" to log into your account.

For questions or assistance, please email us at jurisdiction@plsinfo.org [or/,] call us at (650) XXX-XXX [or] text us at (650) XXX-XXXX.

Please do not respond to this message. Replies will be delivered to an unmonitored mailbox. Thank You.

11. Hold Not Needed After

Printed Notice:

**** Expired Hold Notice ****

Your request for this item has expired. If you wish to borrow this item, you may replace the hold. Visit <https://plsinfo.org>, click on “My Account”, select your local library and log into your account. If you would like to pursue other borrowing options, please contact your local library. Your library’s contact information is on the reverse side of this notice.

Emailed Notice:

**** Hold Cancellation Notice ****

The hold you placed on this item has been cancelled since a year has passed since the

original request. If you wish to borrow this item, you may replace the hold. Visit <https://pls-parent.bibliocommons.com> and click on "Log in" to log into your account.

For questions or assistance, please email us at jurisdiction@plsinfo.org [or/,] call us at (650) XXX-XXX [or] text us at (650) XXX-XXXX.

Please do not respond to this message. Replies will be delivered to an unmonitored mailbox. Thank You.

15. Library Notice (email only)

Library Notice:

**** Library Notice ****

The item(s) listed below is(are) due back soon. This notice only lists those items that are due in the next few days. Eligible items are automatically renewed two days before the due date. Items with holds or have reached the maximum renewal limit will not renew. The library account must be current and have a balance of \$50 or less.

For questions or assistance, please email us at jurisdiction@plsinfo.org [or/,] call us at (650) XXX-XXX [or] text us at (650) XXX-XXXX. You can access your account at <https://pls-parent.bibliocommons.com> and click on "Log in" to log into your account.

Please do not respond to this message. Replies will be delivered to an unmonitored mailbox. Thank You.

Statement of Charges (Mail email only) [approved 3/21/24]

60-day notice (For UMS purposes only: notice name – Long Overdue Items)

**** Statement of Charges Due ****

Item(s) on your account is(are) long overdue and is(are) billed to your account. To resume borrowing privileges and ensure materials are available for other patrons, please return the billed item(s) to any library in San Mateo County. Libraries no longer charge overdue fines.

If you have any questions regarding the billed item(s), please contact your local library first before paying the fees. Your library's contact information is on the reverse side of this notice. The total amount due may include charges not listed below.

To pay online for lost items, visit <https://plsinfo.org/>. Click on "My Account," select your library and log into your account.

150-day notice (For UMS purposes only: notice name – Statement of Charges)

**** Statement of Charges ****

Item(s) on your account is(are) now over 150 days overdue and is(are) billed to your account. To resume borrowing privileges and ensure materials are available for other patrons, please return the library item(s) as soon as possible to any library in San Mateo County. Libraries no longer charge overdue fines.

If you have any questions regarding the billed item(s), please contact your local library first before paying the fees. Your library's contact information is on the reverse side of this notice. The total amount due may include charges not listed below.

To pay online for lost items, visit <https://plsinfo.org/>. Click on "My Account," select your library and log into your account.

Expiring Holds (email only using a script) Approved Feb 15, 2024

**** Expiring Hold Notice ****

Your request for this item will be expiring in 60 days. If you would like to extend the expiration date, please contact your local library. For assistance, please email us at jurisdiction@plsinfo.org [or,] call us at (650) XXX-XXX [or] text us at (650) XXX-XXXX.

Please do not respond to this message. Replies will be delivered to an unmonitored mailbox. Thank You.

Sierra Notices during Covid-19 (examples)

PLS Hold Notice for Curbside Service

At the May 29, 2020, PLS Circulation System Managers Special Meeting, we agreed to temporarily change the text to notice #4 Hold Pickup while libraries are closed due to COVID19. The notices for Shoutbomb and i-Tiva will also be updated. Once libraries reopen the original text to notice #4 will be implemented.

Email:

Subject Line: Library Hold Ready - Curbside Pickup by Appointment Only

We're excited to let you know the item(s) you've been waiting for is ready! While the library buildings remain closed, we are offering a new service for you to pick up your holds. Please contact us to schedule your curbside pickup appointment.

Please do not respond to this message. Thank You

Shoutbomb

While the library buildings remain closed, we are offering curbside holds pickup. Please contact us to schedule your curbside pickup appointment.

i-Tiva

We're excited to let you know the item(s) you've been waiting for is ready! While the library buildings remain closed, we are offering a new service for you to pick up your holds. Please contact us to schedule your curbside pickup appointment.

II. Expiring Library Card Notice via Email or Text

Notices are sent within 30 days of the library card expiration date. The **email** text (Approved at the PLS Circulation Managers meeting on 8/18/22):

Your library card will expire within 30 days. Renewing your card is easy: bring photo identification and proof of your current home address to any public library in San Mateo County. To find a library near you, please visit <https://plsinfo.org/whos-open>. Library staff will renew your card in just a few minutes. If you have any questions or are unable to come in, please contact your local library.

Please do not respond to this message. Replies will be delivered to an unmonitored mailbox. Thank You.

SMS (Shoutbombs) text (limited to 150 characters):

Your library card will expire within 30 days. Renewing is easy with photo ID & proof of address. Please contact your local library.

SMS (Shoutbombs) text for expired cards

Your library card has expired. Renewing is easy with photo ID & proof of address. Please contact your local library.

For more information on renewing library cards, see section 03.01 Patron Library Cards.

III. Text (SMS) Notice for Holds

77. &0 hold(s) are ready for pickup at &1. You must pick up your item(s) by &2. For a list of holds, reply with keyword HL. To cancel your pickup reply with CXH.

377. Your library hold(s) are ready for pickup at &0 by &1. Reply with CXH to cancel your pickup: &2

1261. REMINDER, you have hold items still due for pickup. For the titles of holds expiring soon, reply with RHL. To cancel your pickup reply with CXH.

IV. TEXT MESSAGES FOR BILLED ITEMS

#58 Library item(s) is(are) more than 30 days overdue and are billed to your account. Reply with the keyword Bi for a list of these items. Please call xxx-xxx-xxxx ext X during library open hours if you have any questions.

#59 These library item(s) is(are) more than 30 days overdue and are billed to your account. &O. Please call xxx-xxx-xxxx ext X during library open hours if you have any questions.

V. Frozen/Paused Notices via Email

Subject: Courtesy notice of suspended holds

Single hold:

The below listed hold, which you paused, will expire in 1 month. Please contact your local library should you wish to re-activate this hold. You can reach your library at [insert branch address & phone number]

Multiple holds:

The below listed holds, which you paused, will expire in 1 month. Please contact your local library should you wish to re-activate these holds. You can reach your library at [insert branch address & phone number]

04.04 PLS Notice Cycle (rev. 7/2/24) draft

Any changes to the notice cycles must first be approved by the PLS Circulation Managers Committee. Once approved, the Chair will initiate the work ticket with PLAN.

Library notices are sent based on the **Notice Preference** field in the patron record. If a library account has an email address (and the Notice Preference field is set to “none” or “email”), then the overdue notification is automatically made by email. If there is no email available, then the overdue notification is automatically made by phone (and the Notice Preference field is set to “none” or “phone”). If there is no voicemail available and/or no one answers the phone, then a printed letter is mailed on the following day. If there is no telephone number listed, then a printed overdue notice is automatically mailed. At the November 21, 2019 PLS Circulation System Managers meeting, it was agreed the patron templates should be defaulted to NONE in the Notice Preference field. See section 04.02 PLS Patron Notices and Notice Preference for more information.

ILS' Notice Cycle

See section 02.02 Renewals for details on the Auto Renewal feature

All mailed notices are sent by Unique Management Services (UMS)

For 3-Week Items:

1. Courtesy Renewal Notice (Library Notice) – The library patron receives the notice via email or telephone two days before the item is due. If the Notice Preference is set to “Print”, the library patron will not receive this notice.
2. First overdue notice is made 14 days after the due date. Notification is made by email (if email is available), by telephone or by mail.
3. The replacement bill is mailed 30 days after the due date.

For 1-Week Items:

1. Courtesy Renewal Notice (Library Notice) – The library patron receives the notice via email or telephone two days before the item is due. If the Notice Preference is set to “Print”, the library patron will not receive this notice.
2. First overdue notice is made 7 days after the due date. Notification is made by email (if email is available), by telephone or by mail.
3. The replacement bill is mailed 30 days after the due date.

For Items due in less than a week:

1. There is no Courtesy Renewal Notice (Library Notice) on items due in 5 days or less.
2. First overdue notice is made 1 day after the due date. Notification is made by email (if email is available and the Notice Preference field is set to “none” or “email”), by telephone or by mail.
3. A second overdue notice is made 2 days after the due date. Notification is made by email (if email is available and the Notice Preference field is set to “none” or “email”), by telephone or by mail.
4. The replacement bill is mailed 9 days after the due date.

Statement of Charges (mail only)

There are two Statement of Charges notices mailed to patrons. For UMS purposes only, the 60-day notice is “Long Billed Items”.

A. The first notice is sent at 60 days overdue. The patron must have one billed item or one manual charge at least 60 days overdue AND must owe \$50.01 or more, including manual charges.

B. The second notice is sent at 150 days overdue. The patron must have one billed item or one manual charge at least 60 days overdue AND must owe \$50.01 or more, including manual charges.

Statement of Charges are compiled monthly on the first Monday of each month. Notices are mailed on the first Monday, except for PLS holidays when notices are mailed on the following Tuesday. The notices are sent only to patron who have checkouts or charges that go 60 or 150 days overdue in the previous month. Patrons will be mailed either the 60-day or the 150-day notice in the same month, whichever is later, not both. Patrons may receive notices in multiple months if they have checkouts or charges that have different due or assessed dates.

04.07 Paying Bills and Fees (rev. 7/9/24) draft

PLS patrons may return PLS items and pay any bills or fees at any PLS library or online. Replacement charges 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 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”.

Caution: *Never reduce a replacement bill to \$0.00. The item will not be checked-in from the patron’s account. It may block a patron’s account. Balances may be paid or waived.*

Limits: Patrons owing more than \$50 are blocked from further borrowing and remote services. *(Note: Databases can still be accessed if an account is blocked.)* 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 “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. *Note: 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.) 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.