

PLS Circulation Managers Committee Agenda

March 20, 2025

2:00 PM

Hybrid Meeting – Belle Haven Library

100 Terminal Avenue, Menlo Park, CA 94025

Zoom Meeting:

<https://us06web.zoom.us/j/88549952899?pwd=E7gBKY2HsKGHlsUN7tTqs4ezL5Zbs4.1>

Meeting ID: 885 4995 2899 Passcode: 6S0^Jr

Facilitator: Nora Mercer, MPL

Recorder: SMPL

I. Roll Call and Agenda Review

II. Approval of Consent Items (Action Item)

- | | |
|--|----------------------|
| A. Approval of February 20, 2025 Minutes | Attachment 1, pg. 4 |
| B. New Location Code Request – MPL Video Games | Attachment 2, pg. 10 |
| C. New Location Code Request – MPL Board Games | Attachment 3, pg. 11 |
| D. New Location Code Request – BPL Video Games | Attachment 4, pg. 12 |
| E. New Location Code Request – SBL Video Games | Attachment 5, pg. 14 |
| F. 02.02 Renewals | Attachment 6, pg. 15 |
| G. 03.09 Creating and Editing Patron Templates | Attachment 7, pg. 18 |

III. Reports

- A. PLS Delivery Report
- B. PLAN Report

IV. Old Business

- A. Update text for statement of charges (**Action Item**) Attachment 8, pg. 23
- B. What day of the week will new billing notices be mailed? (**Action Item**)
- C. Rebuilding Lib Tools (**Action Item**)

V. New Business

- A. Updates to Energy & Water Saving Toolkits – SMC Sustainability Department
- B. Mark unused loan rules for deletion (**Action Item**) - PLAN Attachment 9, pg. 24
- C. Update text for courtesy notice of paused holds (**Action Item**) – PLAN
- D. Staff placing item level holds on Lucky Day/Quick Pick copies – MPL

VI. Announcements

VII. Public Comment - (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 agendaized pursuant to state law.)

VIII. Agenda Building for April 17 Meeting

IX. Adjournment

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

Belle Haven Library, 100 Terminal Ave, Menlo Park, CA 94025

Next Meeting: April 17 20, 2025

Recorder: SMPL

Next Admin Council Meeting:

Recorder:

SBL – January 2025

SMCL – February 2025

SMPL – March 2025

SSF – April 2025

BPL – May 2025

DCL – June 2025

RCL – July 2025

SBL – August 2025

SMCL – September 2025

SSF – October 2025

BPL – November 2025

DCL – December 2025

PLS CIRCULATION MANAGERS MEETING

MINUTES

February 20, 2025, 2:00-4:30 PM

Hybrid Meeting – Belle Haven Library

Upper Level Conference Room

100 Terminal Avenue, Menlo Park, CA 94025

Join Zoom Meeting

Meeting ID: 885 4995 2899

Passcode: 6S0^Jr

<https://us06web.zoom.us/j/88549952899?pwd=E7gBKY2HsKGHlsUN7tTqs4ezL5Zbs4.1>

Facilitator: Nora Mercer, MPL

Recorder: SMCL

Present: Geralyn O'Brien (BPL), Molly Cronin (DCL), Nora Mercer (MPL), Raquel Metcalfe (SBL); Ciera Pasturel (SMCL); Jon Jung (SMPL), Stevie Norman (SSF)

Guests: Scott Young (PLAN), Justin Wasterlain (PLS), Daniel Kith (PLS), Carol Frost (PLAN), Homer Martinez (RCL)

- I. Agenda Review
- II. Approval of the Consent Calendar – MSP BPL/SMPL – Approved by Circ Managers present.
 - a. Minutes from meeting – January 16, 2025 [Attachment 1]
 - b. 02.07.02 New Code Request Form [Attachment 2]
 - c. 02.07.02A New Code Request Form Instructions [Attachment 3]
 - d. 04.08 Long Billed Items Procedure [Attachment 4]
 - e. New Location Code Request – SSF Parenting [Attachment 5]
 - f. New Location Code Request – SSF Main Video Games [Attachment 6]
 - g. New Location Code Request – SSF Grand Video Games [Attachment 7]
 - h. New Location Code Request – SMCL Outpost [Attachment 8]
 - i. New Location Code Request – DCL Video Games [Attachment 9]
- III. PLAN Items
 - a. PLS Delivery Report

- i. Serramonte Closure – Bins will be delivered to John Daly location.
 - 1. Patrons are still able to place holds.
 - 2. A potential year-long project.
 - 3. Molly is working on an FAQs to be sent to SSF Library.
 - 4. Closure will be 2 weeks long.
 - 5. Closed 2/24-3/10.
 - 6. Serramonte questions may be forwarded to Molly at DCL.
- b. PLAN Report
 - i. We were able to move ahead with the searchability of the PLS mobile app.
 - 1. Searching for RWC for example, unable to find that branding within a mobile app store
 - 2. PLAN signed a contract with no additional charges.
 - 3. Will provide each library with their own individual, branded app.
 - 4. Added to Apple App Store and Google Play Store
 - 5. Scott is working with their team to implement it
 - 6. No timeline as of now. An update will be provided next meeting.
 - 7. SMCL will not change. Will maintain their own individual app.
 - 8. PLS app will also stay.
 - 9. There is hope to move this forward quickly.

IV. Action Items

- a. Changing bill/statement notices – PLAN [Attachment 10]
 - i. PLAN will work with SMCL for Belmont Library closure.
 - ii. As of last year, UNIQUE is no longer being used for collections.
 - 1. Instead, statements were sent out.
 - iii. The current cost is exceeding what we had initially estimated. Without doing anything, we will be beyond the budget extensively.
 - iv. The patrons who select mail notifications in lieu of email or phone notifications are approximately 1% of the notices that are sent out.
 - 1. \$2,500 per year.
 - 2. Mailing items (envelopes, postage, etc.) has also risen.
 - 3. In FY 22-23, we sent out 41,675 notices and spent \$29,254.
 - 4. In FY 23-24, we sent out 48,08 notices and spent \$37,667,
 - 5. In FY 24-25, we estimate that 64,202 notices will be sent out. The estimated cost is \$56,423. This is approximately \$9,000 higher than we had previously estimated.
 - v. Possible solutions include:
 - 1. Email rather than mail the 60-day and 150-day statements.
 - 2. Change the statement of charges to one notice at 90 days overdue.
 - 3. Modify bill notices to be sent weekly instead of daily.

- 4. Marketing campaign to advocate for email notices.
- vi. Potential thoughts to consider:
 - 1. Is it possible to reverse the decision if the outcome is not what we would like?
 - 2. Can the notices be combined by physical address? Privacy concerns may not allow this.
 - 3. Reducing the notices to weekly seems optimal.
 - 4. One notice provides a larger, bigger picture of what is out and overdue.
 - 5. 90-day statement sounds ideal.
 - 6. The billing cycle stays the same.
- vii. LX Starter Emails
 - 1. Due to PLS being large, PLAN is having some issues implementing this feature.
 - 2. Hopefully, this will move forward soon.

MSP to approve Recommendations numbers one through three with a 90-day notice. DCL/SSF

- b. Add text notification preference option in Sierra
 - i. PLAN (Scott) does not currently know the answer to this inquiry. No action currently. Action item is moved to Agenda Building.
- V. Informational Items
 - a. Max items table for Library of Things – MPL
 - i. Max item table for Library of Things items has been implemented.
 - ii. The current limit is 3 items to start.
 - iii. As more items are added to the Library of Things collection, issues may arise that limit how many different items can be checked out. For example, 3 video games and 1 board game would be considered over the limit.
 - b. Revisiting Lib Tools – SMPL
 - i. Was used to order barcode numbers, transit slips, RFID tags, and PLS brochures, and more.
 - ii. This was an automated system that could be ordered through PLS and no longer exists.
 - iii. It was a great tool to see what barcodes have been used.
 - iv. PLAN has it on their list, but it is a low priority item. If Circulation Managers would like to put it higher on their list, please note that this is possible.
 - v. Agreement to make this a priority and add as an Action Item for a future meeting.
 - c. Holdable County Parks Passes – BPL
 - i. Currently 93 holds on these passes.

- ii. Potential for some passes to be holdable.
 - iii. The CA State will re-issue commissioned ones.
 - iv. How much will it cost to receive replacement County Park Passes?
 - d. Belmont Library temporary closure – SMCL
 - i. Closure date is March 19.
 - ii. Collection will be temporarily suppressed.
 - iii. Request for patron checked out (Belmont) items to be extended to August 1.
- VI. Circulation Manual in FIDO Update/Review/Approve (ongoing)
 - a. 03.09 Creating and Editing Patron Templates (new section) [Attachment 11]
 - i. MPL and SMPL will play around with the new instructions. Will bring back for approval at the next meeting.
 - ii. Homer is also working on the Reports Calendar.
- VII. Agenda Building
 - a. Add text notification preference option in Sierra
 - b. Revisiting Lib Tools (Action Item)
 - c. 03.09 Creating and Editing Patron Templates (new section) [Attachment 11]
- VIII. Announcements
 - a. BPL: Movie trivia night occurring tomorrow night.
 - b. DCL: Serramonte will be closed for 2 weeks: 2/24-3/10. No deliveries will be received. Book drop will also be closed.
 - c. MPL:
 - i. Trivia night on 2/28 (bookish trivia). 21+. Drinks will be provided.
 - ii. Recruitment for full-time Library Assistant. Closes the beginning of March.
 - iii. Hourly Library Assistant position opening will occur soon.
 - iv. The books at Belle Haven are holdable except for Adult New Fiction and Non-Fiction.
 - v. All video games are no longer holdable.
 - d. RCPL: None.
 - e. SBL: None.
 - f. SMCL: None.
 - g. SMPL:
 - i. City Librarian has resigned. Will be leaving at the end of the month. The Deputy City Librarian will be the interim City Librarian.
 - ii. New Library Aide, Sahra.
 - iii. One Library Assistant, Carole moved laterally to a different schedule.
 - iv. An on-call Library Assistant, Byri, moving to regularly-scheduled per diem position.

- h. SSF: None.
- 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: 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:

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Meeting Locations

Belle Haven Library, 100 Terminal Ave, Menlo Park, CA 94025

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

Next Meeting: March 20, 2025

Recorder: SMPL

Next Admin Council Meeting:

Recorder:

SBL – January 2025

SMCL – February 2025

SMPL – March 2025

SSF – April 2025

BPL – May 2025

DCL – June 2025

RCL – July 2025

SBL – August 2025

SMCL – September 2025

SMPL – October 2025

SSF – November 2025

BPL – December 2025

02.07.02 New Code Request Form (rev. 2/26/25)

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 Requesting Library

Requestor's email:

- A. Location Code C. Item Type
- B. Patron 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: 4mtbg ; 4btbg ; 4mtxx ; 4btxx

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

- 4mtbg – Menlo Park - Main Board Games
- 4btbg – Menlo Park – Belle Haven Board Games
- 4mtxx – Menlo Park – Main Library of Things
- 4btxx – Menlo Park – Belle Haven Library of Things

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

A. Location codes: To what library and collection does this item belong? **MPL**
 Is this a new location code? **Yes**
 Why is it different from the location codes your library already uses? **A new location code for board games and a generic location code for future Library of Things acquisitions**
 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.)

02.07.02 New Code Request Form (rev. 2/26/25)

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: 03/06/2025

Requesting Library: Burlingame-Main

Requestor's email: obrieng@plsinfo.org

A. Location Code C. Item Type

B. Patron 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: 2yvtg

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

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

- A. Location codes: To what library and collection does this item belong? **This belongs to the Burlingame Main Library Video Collection**
Is this a new location code? **-Yes**
Why is it different from the location codes your library already uses? **We**

want to have a location code for video games to limit the # of checkouts. 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.

- A. 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? How long before this card expires? Does the new p-type need to be assigned to a Max Item Table? 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.
- B. 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.
- C. Loan rules: Loan rules define the loan period, renewals, holds, processing fee and notice cycle. Is this a new loan rule? What is the loan period, number of renewals and holdability? What is the notice and billing cycle? Which location codes are used? How are existing patron (p-types) and materials (i-types) affected? What makes this rule different from existing loan rules? Reminder: current loan rules do not assess overdue fines. Include the New Loan Rule Elements Form below when submitting a request for a new loan rule
- D. Patron Code 2 (P2): How will this be used with patron types? Are there any special privileges with the patron types and the Patron Code 2? What are the check-out, hold and renewal limits for this new patron? How long before this card expires?

Be prepared to attend and discuss the request at a Circulation Manager's Meeting.

Part II

Process

02.07.02 New Code Request Form (rev. 2/26/25)

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 **3/12/25** Requesting Library **San Bruno Library**

Requestor's email:

A. Location Code

C. Item Type

B. Patron 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: **6stvg**

Item Location Label for the Proposed New Code (100-character length max):
San Bruno Library – Video Games

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

A. Location codes: To what library and collection does this item belong?
San Bruno Library

Is this a new location code? **Yes**

Why is it different from the location codes your library already uses? **SBL wants to have the location code for video games and implement the 3-item limit.** 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.

02.02 PLS Renewals (rev. 2/26/25) DRAFT

An item may be renewed if the renewal limit has not been reached and there are no outstanding holds. Generally, items can be renewed five times, but local jurisdictions vary. See Section 02.04 PLS Table of Loan Periods and Fines for specifics. Do not override the limits of another library.

Telephone

The Telephone Renewal System (TRS) telephone number is: 650-638-0399 and can be accessed 24-hours a day. When patrons call they hear the following:

- To access your library record press 1
- To listen to the library's announcement press 2

Pressing 1:

Please enter the patron barcode

- To renew items press 1
- To hear a list of checked out titles press 2
- To hear a list of items on hold press 3
- To hear a list of outstanding charges press 4

Pressing 2:

The Telephone Renewal System allows patrons to renew books with the simple use of a touch tone phone. Once a patron's books have been renewed, the system announces the new due date (mm/dd/year).

Items are listed by barcode, not title.

If an item cannot be renewed the system prompts the patron to contact his/her library. If a patron chooses to Renew All Items, the patron must stay on the phone and complete the entire call otherwise the renewals will not happen

In Person

To renew an item for a patron at the desk, scan the patron's library card, click on the tab "Checked-out Items". Click on the titles to be renewed and the "Renew" button turns from grey to black. Click the renew button: new due dates will show for the selected items. Items will not renew if they have already been renewed too many times or if another patron has placed a hold on the item.

To renew an item on a Self-Check-Out unit, the patron needs to scan the library card and enter the PIN. If the items are present, the items are placed on the RFID pad to renew. If items are not present, then the patron can select "Go to Account" and then "Items Out". The patron has the option of selection all items or individual items to renew. Items that have reached the maximum renewal or have holds will not renew.

When an item owned by another library reaches its maximum renewals, do not override to renew the item. An override may only be permitted by the owning library. Items that have Holds cannot be renewed.

Online

Patrons may renew their own items online. Once they have logged into the library online catalog with their library barcode or username and PIN, they select “My Borrowing” on the menu bar. Under “Checked Out (Renew), they can select Overdue or Next due to see the list of items checked out. From that page, they can select which items to renew and then click the Renew button.

PLS Mobile App

Patrons may renew their own items via the PLS Mobile App on their smart phones or tablets. The app can be downloaded from Apple iTunes or Google Play. **Search for Peninsula Library System.** (<http://www.plsinfo.org/communicate>) ~~Patrons can download the app by searching for the library name in the Apple App store or Google Play store on their device.~~ Once downloaded, patrons can log in with their Library Card Number and PIN. Under the My Account tab, patrons can view what items are check out and renew individual items. **Patrons can also link other library card numbers.**

SMS Text Messaging

Patrons may renew their own items via text message on their cellular phones. They can set up a Shoutbomb texting service by texting SIGNUP to pls@shoutbomb.com. They will receive texts asking for their library card number and PIN. Patrons will be asked to confirm the service. They can renew list or renew selected items by following the prompts of the text messages.

Auto Renewal Feature

Sierra’s Auto-Renew Feature was implemented in September 2019. ~~This feature will replace the renewal scripts that were implemented on 12/1/18.~~ Items 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. (For example, if an item is due on Friday, May 10th, the item will renew on Wednesday, May 8th but the due date will be Friday, May 31st.) Once the new feature is implemented, the opt-out option will be removed.

Auto Renew will only renew items that do not have holds or have not reached the renewal limits. The patron must not owe more than \$50.00 in ~~overdue fines or~~ fees, have a manual block, ~~be in collections~~ or have an expired library account. Patrons will receive notification via email, text or telephone that includes a list of titles that were renewed, including the new due date, and a list that could not be renewed due to renewal limits. Patrons are also informed to contact their local library as soon as

possible if they believe an item should have renewed so that overdue fines are not assessed.

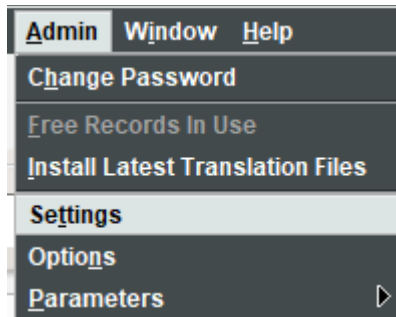
03.09 Creating and Editing Patron Templates (rev. 2/3/25) **new section**

A PLS Circulation Manager can create patron templates for long term or temporary use. The expiration date on most patron templates are updated daily using an existing script. After creating a template, notify PLAN which script to use. Currently, there are scripts for 90-day, 3-year and 5-year expiration dates. A template can also be updated manually on a monthly basis using your logins.

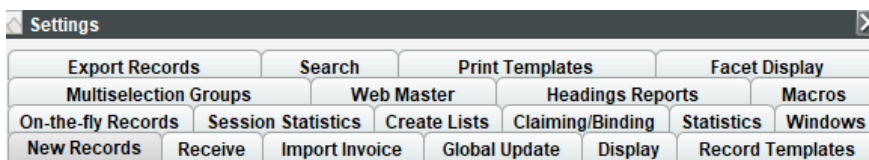
When naming a template, start with either your 3-letter abbreviation or your alphanumeric location code. This keeps your patron templates together.

I. Creating Patron Templates

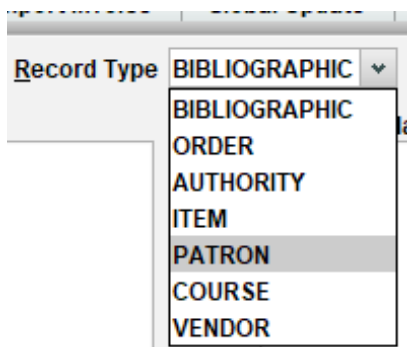
A. Using Sierra, click on **Admin** and choose **Settings**



B. In the Setting dialog box, click on the **Records Templates** tag



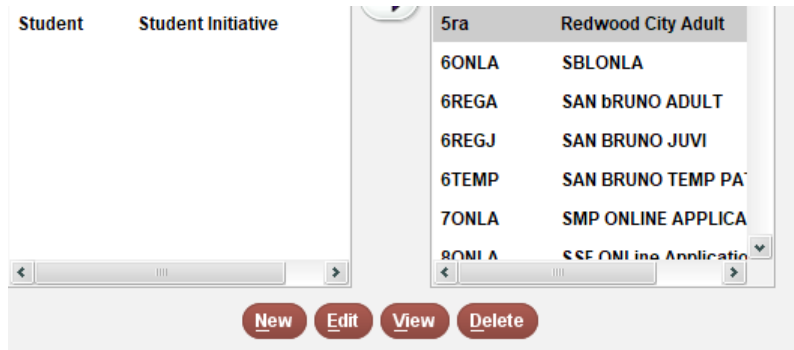
C. Using the drop down arrow, change Record Type **Bibliographic** to **Patron**



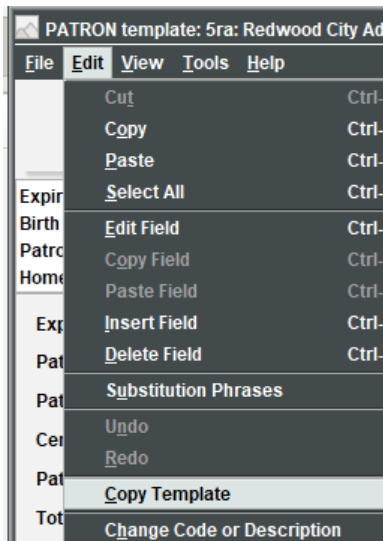
D. In the next screen, the Preferred Templates are the patron templates assigned to the login. The Other Templates are all the patron templates in use system-wide.



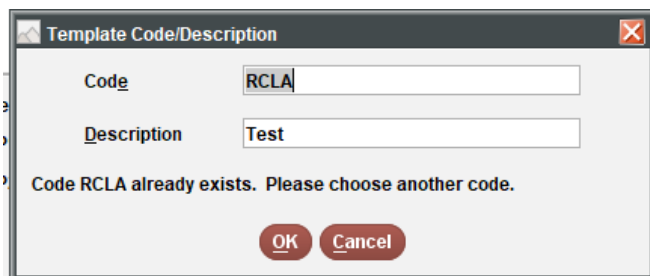
E. Select the template most like the one you wish to add and click on Edit



F. Click on Edit at the top of the template and select Copy Template



- G. The Template Code/Description dialog box opens. **(Note: If you need to delete your new template, ensure you do not delete the original template that is being copied.)** Enter the code you would like to use. You are limited to 10 characters. Next, enter a description. You are limited to 26 characters. Keep in mind that staff will be seeing both the template code and description once you add the template to the Preferred Templates associated with the Sierra login.

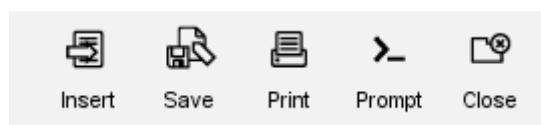


- H. If a code is already in use, you will be prompted to choose another code. Once you change the code, click OK
- I. Click on Save and then Close to save the new template
- J. Then click on Close to save the template that is being copied. Be careful not to delete this template. If you accidentally delete the original template, you will need to re-add it. Once done, open a PLAN HelpDesk ticket to re-add the new template to the appropriate script.
- K. You are now done creating the new patron template. Remember to inform PLAN is the new template is to be assigned to one the scripts that updates the expiration date on a daily basis.

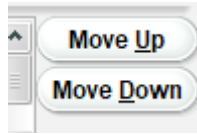
II. Editing a New or Existing Patron Template

PLS Circulation Managers only edit their own patron templates. If you notice an error in a template, the appropriate PLS Circulation Manager needs to be contacted. You can now edit the new Patron Record that you just created. You can add fields that prompt when registering a new patron and remove fields that you do not use. (Note: 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.)

- A. Select the template you would like to edit. Enlarge the template so you can see all fields on the screen. In the upper right corner, you will find your Prompt tab.



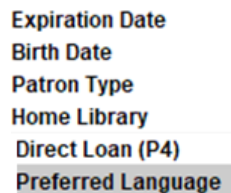
- B. For the fixed fields in the patron record, you have a Move Up and Move Down tab. This is helpful to prompt the order you would like the fix fields to appear. This is especially useful if you still use paper applications.



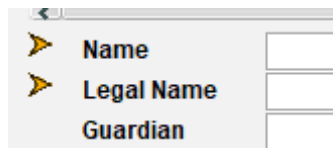
- C. From the fixed fields, you use the Prompt tab to select and deselect fields. You can select various fields. Reminder,

Expiration Date	02-01-2028	Birth Date	- .	Current Item B	
Patron Code (P1)	- NO INFORMATION	Home Library	5r Redwood City - Downtown	Current Item C	
Patron Code (P2)	- NONE	Patron Message	- NO MESSAGE	Current Library of Things (Max 3)	
Patron Code (P3)	0 NONE	Highest Overdues		Direct Loan (P4)	6 Redwood City Redw M697
Patron Type	5 SREGA	Manual Block	- NONE	Patron Agency	0 -
Total Checkouts		Claims Returned		Last Circ Activity	- .
Total Renewals		Money Owed	\$0.00	Preferred Language	eng English
Current Checkouts		Current City Items		Notice Preference	

- D. Once you have selected your fields, you use the Move Up/Move Down tabs to choose.



- E. Next, you can add (or delete) any variable field. If a field is missing, you can add the field by choosing the Insert tab. However, do add the field in the correct line. There is no Move Up/Move Down tab for variable fields. If the field is to be prompted, click on the Prompt tab. If you click on Prompt tab again, it will remove the prompt function but not delete the line



You can also insert standard Messages or Notes to that new template. For example: “online registration – do not delete.”

Exception: For online registration patron templates only, do not add a PIN field to the online patron template. If added, patron will not be allowed to enter a PIN number to their temporary patron record.

- F. Once you are done making edits, click on Save and Close. Then click on Save Settings.



- G. The new patron template is now ready for use. You will need to transfer it from the Other Templates to the Preferred Templates using the arrows in between both boxes. When using shared logins, you only need to transfer the template once. Once staff log out of Sierra and then login again, the new template will appear as an option to use. If staff have their own logins, they need to be informed to add the new template to their logins.



- H. You are now done editing a patron template.

04.02.01 PLS Text of Circulation Notices (rev. 7/22/24)

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Statement of Charges (Mail only) [approved 3/21/24]*60-day notice (For UMS purposes only: notice name – Long Overdue Items)*

**** Statement of Charges ****

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.

Unused Loan Rules as of 3/11/2025**Section 1: Loan rule will be deleted**

- Loan rules have been marked for deletion for at least 1 year
- Loan rules are not in use in any current checkouts or the LRDT

➤ *Circ Managers: Vote to delete loan rules*

LR #	NAME	LR #	NAME

Section 2: Loan rules to be marked for deletion

- Loan rule is not in use in any current checkouts or the LRDT
- Loan rule is not currently marked for deletion

➤ *Circ Managers: Vote for loan rules to be marked for deletion*

LR #	NAME	LR #	NAME	LR #	NAME
7	A 3WK 1RN NH	89	HF 2H ORN NH	205	J 3WK ORN NH NP
8	A 3WK ORN	113	A 3WK 5RN LP	207	J 3WK 5RN NH NP
11	A 1WK 2RN	114	A 3WK 5RN NH	211	J 1WK 5RN NP
16	A 1WK ORN LP	118	A 1WK 5RN NH	227	NF 1WK 5RN NH NP
17	A 1WK ORN NH	146	A 1WK 3RN	277	NF 1WK 5RN NH NP
18	A 1WK ORN NH LP	156	J 1WK 3RN	230	HHF 4H ORN NH NP
21	A 4WK ORN NH NP	162	NF 3WK 3RN	231	HHF 7DA ORN NH NP
22	A 3DA ORN NH	166	NF 1WK 3RN	236	A 1WK 1RN NH NP
25	A 1DA ORN NH	169	NF 6WK 2RN	237	A 3WK 1RN NH NP
27	J 3WK ORN NH	172	HF 1WK 3RN	238	J 1WK 1RN NH NP
38	J 1WK ORN	180	HHF 3H ORN NH NP	239	J 3WK 1 RN NH NP
40	J 1WK ORN NH	196	A 3WK 5RN NH NP	246	HF 7DA ORN NH NP
71	NF 7DA ORN NH NP	200	A 1WK ORN NH NP	247	A 1HR 2RN NH
83	HF 7DA ORN NH	201	A 1WK 5RN NP		
86	HF 1DA ORN NH	202	A 1WK 5RN NH NP		

Section 3: Loan rule cannot be deleted

- Loan rule has been marked for deletion for at least one year
- Loan rule is in use in current checkout and/or the LRDT

➤ *Circ Managers: Review checkouts and LRDT; make updates to item records and/or submit PLAN ServiceDesk ticket to update the LRDT*

LR #	NAME	Item Records	LRDT

Unused Loan Rules as of 3/11/2025**Section 4: Rarely used loan rules**

- Loan rule not in use in any current checkouts
- Loan rule is used in a few lines in the LRDT

➤ *Circ Managers: Review the LRDT and submit a PLAN ServiceDesk ticket to update the LRDT*

LR #	NAME	LRDT Line	Library
20	NF 4WK ORN NH NP	25, 147, 148, 149, 150, 195, 290	SMCL, MPL, RCL, SSF
46	8WK 2RN NH	517	ALL
67	NF 1WK ORN	526	SMPL
80	HHF 1H ORN NH	77	SBL
129	NF 3WK 5RN NH LP	6	SSF
137	NF 1WK ORN NH HP	89, 93	SBL
181	HHF 4H ORN NH	21, 22	SSF
194	A 3WK ORN NH NP	209	MPL