

PLS Circulation Managers Committee Agenda

August 20, 2026

2:00 PM

Hybrid Meeting

Belle Haven Library

100 Terminal Avenue, Menlo Park, CA 94025

Zoom Meeting:

<https://redwoodcity.zoom.us/j/98183430071?pwd=OR8EKFPqtChfbZxOBsGmz7wr8xzw>

Q1.1

Meeting ID: 981 8343 0071

Passcode: 313596

Facilitator: Homer Martinez (RCL)

Recorder: DCL

I. Introductions and Roll Call

II. Approval of Consent Items (Action Item)

- A. Approval of July 23, 2026, Minutes Attachment 1 pg 4
- B. Proposed code for sewing machines – SBL Attachment 2 pg 7
- C. New code request 3WK 0RN Holdable – DCL Attachment 3 pg 8
- D. New code request NF 3WK 0RN HP 3D - DCL Attachment 4 pg 13

III. Reports

- A. PLS Delivery Report
- B. PLAN Report

IV. Old Business

- A. Deleting “In Transit” messages – PLAN (**Action Item**)
- B. Can we shorten the time before changing In Transit to Missing – SMCL (**Action Item**)
- C. Online Patron Registration Form – PLAN (**Action Item**)

V. New Business

- A. Home Energy Kit distribution – SBL (**Action Item**)
- B. Returned mail 04.03 of Circ Manual- RCL (**Action Item**) Attachment 4 pg 18
- C. RFID tagging standards for all libraries – ALL (**Action Item**)

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 Administrative Council from discussing or acting on any matter not agendaized pursuant to state law.)

VIII. Agenda Building for September 17, 2026, 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 rollcall.

(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 (b)(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)."

In accordance with 54953.8(b)(8), please contact info@plsinfo.org for requesting a reasonable accommodation for individuals with disabilities, consistent with the federal Americans with Disabilities Act of 1990 (42 U.S.C. Sec. 12132).

Meeting Locations

Burlingame Library, 480 Primrose Rd, Burlingame, CA 94010

Daly City Library, 40 Wembley Drive, Daly City, CA 94015

Menlo Park Library, 800 Alma Street Menlo Park 94025

Redwood City Library, 1044 Middlefield Rd, Redwood City, CA 94063

San Bruno Library, 701 Angus Avenue West, San Bruno, CA 94066

San Mateo County Libraries, 125 Lessinga Court, San Mateo, CA 94402

San Mateo Public Library, 55 West 3rd Ave, San Mateo, CA 94402

South San Francisco Library, 901 Civic Campus Way, South San Francisco, CA 94080

Next Meeting: September 17, 2026

Recorder: **MPL**

Next PLS Administrative Council Meeting: October 1, 2026

Recorder:

DCL – January 2026

MPL – February 2026

SBL – March 2026

SMCL – April 2026

SMP – May 2026

SSF – June 2026

BPL – July 2026

DCL – August 2026

MPL – September 2026

RCL – October 2026

SMCL – November 2026

SMP – December 2026

PLS Circulation Managers Committee Minutes

July 16, 2026

2:00 PM

Hybrid Meeting

Belle Haven Library

100 Terminal Avenue, Menlo Park, CA 94025

Zoom Meeting:

<https://redwoodcity.zoom.us/j/98183430071?pwd=OR8EKFPqtChfbZxOBsGmz7wr8xzw>

Q1.1

Meeting ID: 981 8343 0071

Passcode: 313596

Facilitator: Homer Martinez (RCL)

Recorder: BPL

Present: Geralyn O'Brien (BPL), Natalie Juhl (DCL), Nora Mercer (MPL), Homer Martinez (RCL), Raquel Metcalfe (SBL), Ciera Pasturel (SMCL), Jon Jung (SMP), Brian Malibiran (SSF)

Guests: Daniel Kith (PLS), Justin Wasterlain (PLS), Richard Brooks (SSF) Scott Young (PLAN)

I. Introductions and Roll Call

II. Approval of Consent Items (Action Item) MSP MPL/SMP

A. Approval of June 18, 2026, Minutes

1. Add to section 4 item B2 we agreed to discard phone tree and update sections in Circ Manual.
2. Patron limits table will be implemented on 7/20/26 if successful, Vanessa will email Circ Managers and each jurisdiction will update the LRDT.
3. 4 vendors for online patron reg were OrangeBoy, UMS, Quipu, Libconnect,

B. 02.07.02 New Code Sp J Graphic Novel - RCL

C. 02.07.02 New Code Sp Adult Nonfiction – RCL

III. Reports

A. PLS Delivery Report-Nothing to report today.

B. PLAN Report-SBL lockers install by end of July. PLAN is working on modifying barcode generator for patron and item barcode ranges. Sierra training topics that need to be covered: import files, statistics, instructions on global update, json in create list.

IV. Old Business

A. (Action Item)

V. New Business

A. In Transit Too Long –

- 1). Which status to use H or M- MSP SSF/MPL to change to missing status, DCL-voted no, all other libraries voted yes. Can Vanessa coordinate when

items will be changed? We will verify with Vanessa, Homer will email and cc managers Vanessa's responses.

2). Deleting In Transit messages-moved to future agenda

- B. Gates – BPL-Special meeting** will be planned to address this topic; sub-committee has to be 4 or less Circ Managers. One idea was that the tags needed a standard protocol, currently we are all using different protocols.

1) How gates should work

2) End of life

3) Can we all be on the same schedule?

- C. County Park Passes – SMP (Action Item)-** Each library is on their own to purchase passes

- D. Cancelling the August 20, 2026, meeting (Action Item)-**not cancelling and we will meet at Belle Haven.

VI. Announcements

RCL-Fiona Potter resigning, going to Community College in Contra Costa County.

SMP-Main Library celebrating 20 years this August 2026 of the remodeled building, events/programs are being planned.

- 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 Administrative Council from discussing or acting on any matter not agendized pursuant to state law.)

- VIII. Agenda Building for August 20, 2026, Meeting**
Home energy kits distribution
Deleting In Transit message
All Libraries tagging items with the same standards.

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 rollcall.
- (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 (b)(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).”

In accordance with 54953.8(b)(8), please contact info@plsinfo.org for requesting a reasonable accommodation for individuals with disabilities, consistent with the federal Americans with Disabilities Act of 1990 (42 U.S.C. Sec. 12132).

Meeting Locations

Burlingame Library, 480 Primrose Rd, Burlingame, CA 94010
Daly City Library, 40 Wembley Drive, Daly City, CA 94015
Menlo Park Library, 800 Alma Street Menlo Park 94025
Redwood City Library, 1044 Middlefield Rd, Redwood City, CA 94063
San Bruno Library, 701 Angus Avenue West, San Bruno, CA 94066
San Mateo County Libraries, 125 Lessinga Court, San Mateo, CA 94402
San Mateo Public Library, 55 West 3rd Ave, San Mateo, CA 94402
South San Francisco Library, 901 Civic Campus Way, South San Fransico, CA 94080

Next Meeting: August 20, 2026

Recorder: **DCL**

Next PLS Administrative Council Meeting: August 6, 2026

Recorder:

SSF – June 2026
BPL – July 2026
DCL – August 2026
MPL – September 2026
RCL – October 2026
SMCL – November 2026
SMP – December 2026
SSF – January 2027
BPL – February 2027

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: 8/5/26 Requesting Library: SBL

Requestor's email: metcalfe@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: 6sa6t

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

San Bruno Library – Sewing Machine

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

A. Location codes: To what library and collection does this item belong? [Library of Things](#). Is this a new location code? [Yes](#). Why is it different from the location codes your library already uses? [This location code will be designated for borrowing of Tools that only adult patrons will be able to borrow](#). Because this location will be only for adult check-out. If the proposal uses an existing location code, show how p-types and i-types are affected in the equation that is the LRDT. Does the new location code need to be assigned to a Max Item Table? [No](#) Which table? (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: 08/06/26

Requesting Daly City Library

Requestor's email: rees@plsinfo.org juhl@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:

59**NF 3WK 0RN**

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?

Is this a new location code?

Why is it different from the location codes your library already uses? 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? How

FIDO 02.07.02 New Code Request Form

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.

- 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.
- D. 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

Duplicating Loan Rule #61 – 3 week, 0 renewals, but making holdable, with regular processing fee

- E. 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

- Use one form for each code requested. For example, if you are requesting a new location code and new I-type, use two forms. If you are requesting similar location codes for different branches, use one form (i.e. teen graphic novels for Menlo Park and Belle Haven).
- As part of the justification of new patron types and loan rules, the "Patron Blocks Element Form" and the "New Loan Rules Elements Form" must be completely filled out and submitted with the New Codes Request Form.

FIDO 02.07.02 New Code Request Form

- Submit the **completed** form and justification to the Chair of the Circulation Managers Committee. Incomplete forms cannot be approved by the Circulation Managers. Only include the needed pages for the request. For example, if requesting a new loan rule, submit the pages that include Part I, answer questions in “D. Loan Rules” and completely fill out **Table 2 –New Loan Rule Elements Form**. [Do not submit/email the entire packet!](#)
- The Circulation Managers document the request on the agenda and the decision response in the meeting minutes.
- Committee Chair forwards approved requests to PLAN. The requests will include the date when the code was approved. (If a new loan rule is approved, the “New Loan Rule Elements” form needs to be filled out by the requesting jurisdiction. See below for the form.)
- Circulation Managers update the list of applicable location codes, p-types, i-types and loan rules in Fido and in the ILS
- **Committee Chair alerts each Circulation Manager when the code is ready for use so that each Manager can update his/her section of the LRDT before any new code is implemented**

Part III

When requesting patron types or loan rules, the corresponding elements table below needs to be filled out and included with the New Code Request Form.

Table 1 - PATRON BLOCKS ELEMENT FORM – for new patron types
(Please review the Patron Blocks Table in the Sierra Circ Client for examples: ADMIN>GENERAL>PARAMETERS>PATRON BLOCKS)

Patron Blocks Element	Value
Patron Type	
Patron Agency	999
Patron Exp. Date	Y
Max Owed	\$0.00
Highest Level Odues	
Max Items	
Max Holds	
Max ILL (at one time)	
Max ILL (per interval)	
Max ItemA	

FIDO 02.07.02 New Code Request Form

Max ItemB	
Max ItemC	
Max ItemD	
Max Programs	
Highest Number Odue Points	
Block Days	

Table 2 - NEW LOAN RULE ELEMENTS FORM

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

Loan Rule Element	Value
Name (20 character limit)	NF 3WK 0RN HP 3D
Code	63
Normal Loan Period	21
Holdable	
Bookable	
Home Pickup	Y
Shippable	
Ship Time	
Time Remaining B4 Renew	
First Renew Period	
Additional Renew Period	
Max Number Of Renewals	
Minimum Use	
Eligib To Recall	
Time Return Recall	
Time to Pickup	3
Max Number of Odues	
Max Number of Auto Renewals	
Time First Odue	
Time Second Odue	
Time Third Odue	
Time Fourth Odue	
Time Fifth Odue	
Time Sixth Odue	
Text First Odue	
Text Second Odue	
Text Third Odue	

FIDO 02.07.02 New Code Request Form

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

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 08/06/26 Requesting Daly City Library

Requestor's email: rees@plsinfo.org juhl@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: **63** **NF 3WK 0RN HP 3D**

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?

Is this a new location code?

Why is it different from the location codes your library already uses? 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? 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.
- 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.
- D. 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

Duplicating Loan Rule #61 – 3 week, 0 renewals, but making holdable via the “HOME PICKUP” field being set to “YES”. Hoping that this may allow local holds, while not sending to any other location. Also setting “TIME TO PICKUP” to 3 days instead of 10 days.

- E. 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

- Use one form for each code requested. For example, if you are requesting a new location code and new I-type, use two forms. If you are requesting similar location codes for different branches, use one form (i.e. teen graphic novels for Menlo Park and Belle Haven).

- As part of the justification of new patron types and loan rules, the “Patron Blocks Element Form” and the “New Loan Rules Elements Form” must be completely filled out and submitted with the New Codes Request Form.
- Submit the **completed** form and justification to the Chair of the Circulation Managers Committee. Incomplete forms cannot be approved by the Circulation Managers. Only include the needed pages for the request. For example, if requesting a new loan rule, submit the pages that include Part I, answer questions in “D. Loan Rules” and completely fill out **Table 2 –New Loan Rule Elements Form**. [Do not submit/email the entire packet!](#)
- The Circulation Managers document the request on the agenda and the decision response in the meeting minutes.
- Committee Chair forwards approved requests to PLAN. The requests will include the date when the code was approved. (If a new loan rule is approved, the “New Loan Rule Elements” form needs to be filled out by the requesting jurisdiction. See below for the form.)
- Circulation Managers update the list of applicable location codes, p-types, i-types and loan rules in Fido and in the ILS
- **Committee Chair alerts each Circulation Manager when the code is ready for use so that each Manager can update his/her section of the LRDT before any new code is implemented**

Part III

When requesting patron types or loan rules, the corresponding elements table below needs to be filled out and included with the New Code Request Form.

Table 1 - PATRON BLOCKS ELEMENT FORM – for new patron types
(Please review the Patron Blocks Table in the Sierra Circ Client for examples: ADMIN>GENERAL>PARAMETERS>PATRON BLOCKS)

Patron Blocks Element	Value
Patron Type	
Patron Agency	999
Patron Exp. Date	Y
Max Owed	\$0.00
Highest Level Odues	
Max Items	
Max Holds	

FIDO 02.07.02 New Code Request Form

Max ILL (at one time)	
Max ILL (per interval)	
Max ItemA	
Max ItemB	
Max ItemC	
Max ItemD	
Max Programs	
Highest Number Odue Points	
Block Days	

Table 2 - NEW LOAN RULE ELEMENTS FORM

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

Loan Rule Element	Value
Name (20 character limit)	NF 3WK 0RN HP 3D
Code	63
Normal Loan Period	21
Holdable	
Bookable	
Home Pickup	Y
Shippable	
Ship Time	
Time Remaining B4 Renew	
First Renew Period	
Additional Renew Period	
Max Number Of Renewals	
Minimum Use	
Eligib To Recall	
Time Return Recall	
Time to Pickup	3
Max Number of Odues	
Max Number of Auto Renewals	
Time First Odue	
Time Second Odue	
Time Third Odue	
Time Fourth Odue	
Time Fifth Odue	
Time Sixth Odue	

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

04.03 PLS Returned Mail and Email (rev. 7/2/24) 8/1/26 draft

With most libraries using self-service for checkouts, it is necessary to block accounts using the **Manual Block a-Check Address** and corresponding **m-Message** (properly formatted) until the address issue is resolved. Do not use **Patron Message s-See Note** and/or an **x-Note**. Zip codes need to be changed to 99999 so that bills are continuously sent, especially for those accounts with a balance of \$50.01 or higher. Keep in mind, all bills are printed and mailed. Postage keeps rising

I. Returned Mail:

1. Search for patron's record **by name** in the ILS, in case of duplicate accounts.
2. Check to see if zip code is missing. Use the post office's website: usps.com to verify zip codes.
3. Change the **MANUAL BLOCK** field to **a-CHECK ADDRESS**
4. If a forwarding address is given:
 - A. Insert an **m MESSAGE**, including the former address, as follows:
 YYYY MMM DD - Mail returned from: old address...staff initials/library initials
 - B. Update the new forwarding address in the mailing address field
 - C. Re-mail the notice to the correct address.
5. If no forwarding address is available:
 - A. Change the zip code to 99999 (Notices are not mailed when zip code 99999 is used)
 - B. Insert an **m-MESSAGE** stating the reason why mail was returned. Example:
 YYYY MMM DD - Mail returned. No such number. Unable to forward...staff initials/library initials
 - C. Shred the notice.
6. When the patron presents the card for use:
 - A. Verify correct address with photo ID and proof of current home residence
 - B. If patron has moved to a new jurisdiction, update the patron type, home library, direct loan code and issue a new library card. **Remember to check Overdrive to merge the old barcode to the new one.**
 - C. Change the MANUAL BLOCK to NONE and delete any messages (field **M**).
 - D. Change the zip code from 99999 to the correct code.

II. Returned Email: ~~For email that has been returned, do the following:~~

1. Search for patron's record in the ILS.

FIDO 04.03 Returned Mail and Email

2. Change the **Patron Message** to **CHECK EMAIL**. (**Patron Messages** do not block an account.)
3. The Notice Preference field should be set to – **None**. Otherwise, the patron will not receive any notices, except for a bill (All bills are printed).
4. Insert an **m-MESSAGE** in the patron record indicating that an error message has been received. Include the email address in the note, your initials, library initials and date.

YYYY MMM DD – Email returned from @test.com ...staff initials/library initials

5. Delete the email address from field Z.
6. When the patron presents the card for use:
 - A. Verify correct address with photo ID and proof of home residence in order to update the record.
 - B. Update field Z in the patron record with the correct email address.
 - C. Remove the PATRON MESSAGE and delete any messages (field m).

See section 04.04 PLS Notice Cycle for more information regarding the Notice Preference field.