



Evergreen Indiana Circulation Procedures

Members of the Evergreen Indiana Library Consortium will operate under uniform circulation policies and procedures. This is a condition of participation in the consortium pursuant to the Evergreen Indiana Membership Agreement and the Evergreen Indiana Executive Committee.

The Evergreen Indiana Circulation Policy is implemented by the Evergreen Indiana Circulation Procedures set forth herein. The Evergreen Indiana Circulation Policy and the Evergreen Indiana Circulation Procedures represent the decisions of the Executive Committee. Some policies and procedures may remain under local control, varying with the specific situation of each library, library district or library system.

Patron Profile

The patron profile determines the user's loan period, item limitation and fine and fee rates. See [Appendix A](#) for a list of patron user groups and the various limits. Each user must have one of the following patron profiles assigned:

- Resident
- Resident – Limited Access
- NonResident
- NonResident – Limited Access
- Student¹
- Student – Limited Access
- Reciprocal Borrower
- Reciprocal Borrower – Limited Access
- Outreach
- Temporary
- ILL
- Computer Usage
- PLAC
- PLAC – Limited Access
- Staff

¹ With the approval of their library board, Evergreen Indiana Libraries may issue an Evergreen Indiana library card to a student that does not reside in the library district but is enrolled in a K-12 public school that is located at least in part in the library district (IC 36-12-2-25).

Resident, Outreach and Staff cards are valid for two years. Nonresident, Reciprocal Borrower, Temporary, PLAC and Student cards are valid for one year.

Computer Usage cards do not have check-out privileges. The “Limited Access” patron profile prevents a patron from checking out audio visual materials that have an “R” rating. Parents and guardians have the option of selecting “Limited Access” patron profiles for their children.

All patron information should be entered into Evergreen according to the USPS style. The USPS style and format guide is available at:

<http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf>

How to Issue an Evergreen Indiana Library Card

Residents of Indiana (other than those assigned a “Staff” user profile) presenting Proper Identification (see below for a definition of “Proper Identification”) that establishes that the individual resides in or pays real property taxes on property owned in the library’s service area (the “library district”) are eligible to receive an Evergreen Indiana “resident” library card from their home library. The “Employee “Staff” Profile and Working Account Policy” should be consulted before issuing a card with the “Staff” profile.

Resident cards are issued to those with current addresses located within the library district. Indiana residents not residing in a library district may be eligible to purchase or otherwise obtain an Evergreen Indiana Library card as a non-resident, PLAC, reciprocal borrower or township contract user subject to the laws and regulations covering these types of cards. Non-resident cards and PLAC cards are issued to those individuals residing outside the library district who purchase library cards with full access to library materials and services. All other card holders, temporary, student, computer usage and reciprocal borrower cards are given limited access to services and materials

Applicants for an Evergreen Indiana library card must present the required Proper Identification in person at the Evergreen Indiana library that will issue the library card (see *below* for definition of “Proper Identification”). Property owners who do not reside in Indiana will be required to show proof of real property ownership, such as a tax bill or deed. A parent or legal guardian showing Proper Identification may register a minor child for an Evergreen Indiana library card. Emancipated minors are required to present evidence of their status to void the necessity of the presence of a parent or guardian.

Proper Identification must be presented to apply for an Evergreen Indiana library card. Proper Identification is one of the following:

- a valid Indiana Driver’s License which displays a current address;
- valid Indiana State ID which displays a current address;
- a current government issued photo ID.

If the presented Proper Identification does not display a current address, the applicant must present one item from the Approved List in addition to the Indiana Driver's License, Indiana State ID card or other government issued photo ID presented as Proper Identification. The ID presented from the Approved List must include a current address.

Approved List of ID includes:

- valid voter registration card,
- valid current government issued ID (e.g., military ID, passport),
- bank statement issued within the last 60 days,
- utility bill issued within the last 60 days, or
- property tax receipt.

Upon receipt of their card, Patrons should be reminded that:

- An Evergreen Indiana library cards is not transferable to another user.
- Reciprocal Borrower and Student card holder privileges are limited to the library issuing the card
- Signing an Evergreen Indiana library card denotes acceptance of responsibility for all fines and fees and for payment for lost or damaged materials.
- Registering a minor child for an Evergreen Indiana library card denotes acceptance of responsibility for all fees, fines and payment for lost or damaged materials charged on such minor's library card.
- It is advisable to contact the library to report a lost or stolen library card.

Patron Record Modification

Patrons changing their home library designations will be asked to provide identification and proof of current address. Proof of current address may be satisfied by the presentation of Proper Identification and if necessary, one item from the Approved List of ID which displays a current address.

Staff at member libraries are strongly advised to refrain from modifying a patron record of another member library if the patron does not present his or her library card.

Patron Records

No Evergreen Indiana member library should release any information about a patron record without reviewing and confirming compliance with the Evergreen Indiana Patron Record Confidentiality Policy. This includes "in-person" and "telephone" requests by a patron with respect to his or her own record or the record of a minor.

Evergreen Indiana Patron Moves to another Evergreen Indiana Library System

If the patron moves from one Evergreen Indiana library system to another, there is no need to delete the patron card. Instead, change the home library of the patron from the

old library system to the new library system and update address, email and telephone information in the patron record. This will allow the patron to keep the same card; although it won't count as a new registration, the patron will now be included in reports of all patrons registered in the new home library system

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

Patrons changing their home library designations will be asked to provide identification and proof of current address. Proof of current address may be satisfied by the presentation of Proper Identification and one item from the Approved List of ID which displays a current address.

Borrowing Privileges

A patron must present a card in good standing to borrow materials. A patron's card will be blocked, and no services may be obtained with it if the patron has 15 or more overdue items, or owes \$10 or more in unpaid fines and/or fees. Outreach patrons will not be blocked until they have 50 or more items overdue. The number of overdue materials and/or amount of fines/fees that will result in a patron being "blocked" is calculated at the consortium level and not at the library level.

Delinquent borrowers who have not reached these limits may still borrow materials; the system operator will be notified that the patron is delinquent.

Fines/Fees

To encourage the prompt return of materials, the Evergreen Indiana libraries have established a schedule of fines and fees as an encouragement for the timely return of materials by their due dates. Overdue materials incur fines of 25¢ per day per item.

Evergreen Indiana grants a one-day grace period, so that materials returned one day after the due date will not accrue a fine. Once the one-day grace period has passed, fines *will include the charge for the grace day*. For example, an item which has a 25¢ a day fine that is returned three days after its due date will have a 75¢ fine due. There is a \$10.00 fine cap per item

Overdue Notices

Overdue notices are sent as a courtesy from the Evergreen Indiana Libraries. Failure to receive notices does not exempt patrons from the responsibility for payment for library materials or overdue fines and fees.

Patrons who provide an email address will receive an email notice three days before their materials are due and an email notice on the day their materials are due.

A first overdue notice will be generated 14 days after the due date and sent via email to those patrons who have provided an email address. The 14-day notice will be sent via U.S. First Class mail to those patrons who have not provided an email address. A second overdue notice will be generated and sent via email and U.S. First Class mail 28 days after the due date.

The final notice, which declares the items “LOST” and assesses the replacement cost of the overdue materials and related costs, including collection costs, will be sent via U.S. First Class mail 45 days after the due date.

Replacement Card

The procedures for issuing a replacement library card are the same as the issuance of the original library card. See *above* “How to Issue an Evergreen Indiana Library Card” for application procedure and identification requirements. There is a \$2 fee for a replacement card.

Loss of Privileges

A patron’s access to materials may be limited due to overdue materials or fines and fees. “Blocked” and “Barred” are the two limitations that may be attached to a patron’s record.

User blocked

If a patron’s record is blocked due to overdue materials or fines and fees, a **PATRON EXCEEDS-FINES** message will appear upon attempting a checkout. Selected staff will have the authority to override fines and fees. The number of overdue materials and/or amount of fines and fees that will result in a patron being “blocked” is calculated at the consortium level and not at the library level. A patron’s record will remain blocked until the fines and fees are paid. A patron’s card may be “blocked” if related group or family member cards are “blocked.”

User barred

BARRED is a status that is manually set by library staff. It is Evergreen Indiana Library policy that only the library that barred the patron can unbar said patron. If a barred patron presents items for checkout at other than the library that barred him or her, he or she should be directed to speak with the “barring” library to resolve his or her status and restore his or her privileges.

Each Library Director or designee shall decide the circumstances under which a patron may be barred. This status should be reserved for serious offenses, such as theft of or malicious damage to library materials.

Lost Items

A patron may inform library staff that an item is "LOST." The price of the item and any outstanding fines and fees, plus a processing fee of \$10.00 per item, will be assessed to the patron's card.

Lost items shall be paid for at the billing Evergreen Indiana library. The price of the item (found in the item record) and any outstanding fines and fees, plus the applicable \$10.00 processing fee will be assessed to the patron's record upon declaration that the item is "LOST." Encourage patrons to notify the library that the item is "LOST" to stop additional overdue fines from accruing.

Some Evergreen Indiana Libraries have contracted with third party vendors for collection services. A fee for third party collection services may be added to a lost item record, and will be listed with a bill reason of REFERRAL. It is advisable to direct patrons whose accounts have been turned over to such third party vendors for collection to the referring library, to ensure that all accounts are accurately cleared and fees and fines settled.

Claims Returned

If a user claims to have returned materials that Evergreen Indiana still shows as checked out, the material may be marked with a "Claims Returned" date. Overdue fines stop accruing as of the date entered in the "Claims Returned" field. A user may have up to three (3) Claims Returned items on his or her record at any time. The number of Claims Returned items is calculated at the consortium level.

Renewals

Renewal requests may be made in person, online or by phone. Patrons may also renew their items via the OPAC "*My Account*" feature.

Certain categories of materials are not eligible for renewal. If a "HOLD" has been placed on an item, it may not be renewed. Selected staff will have the authority to force the renewal in special circumstances.

Check-In

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

Messages directing the operator to send items to another location or library, or directions for items on hold are visually displayed on the screen at check-in, and audible alerts will assist the operator in noticing important messages.

Returned materials which are owned by other Evergreen Indiana libraries will be promptly returned via the Evergreen Indiana **InfoExpress**.

Bookdrop Check-in

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

Intra-Evergreen Indiana Lending

If a patron from Library A wishes to borrow an item from Library B, the patron or staff from Library A will place a hold on the item, specifying Library A as the pickup location. Library B will receive a report of items on their shelves, which have holds; they will pull those items listed and capture the existing holds. The screen will instruct staff to route the item to Library A to fill a hold, and the item will be put into transit to Library A.

When Library A receives the item, it will be scanned and placed on the holds shelf for pickup. Once the item is scanned at the pickup location, a holds notice via email will be generated or staff will be prompted to telephone the user with holds notification.

The Holds report should be retrieved and processed promptly each morning at each Evergreen Indiana Library. Items listed should be pulled from the shelf, packaged and processed within 24 hours. The holds list is regenerated every 15 minutes to ensure that the list is fresh whenever a library retrieves it during the day. Holds that are not processed within 24 hours will be re-targeted to another library if possible.

Borrowed items should promptly be sent back to the owning library or on to the next Evergreen Indiana Library to fill a hold.

Proper Intra-Evergreen Indiana Transit Procedures

The following transit procedures are to be followed:

- A transit receipt must be printed out (and attached to the item) by the library filling the hold and/or by the library checking-in the item for return to the owning library.
- The transit receipt should be placed inside the front cover and first page of the item. Alternatively, the transit receipt may be attached to the front cover or front of the item. The transit receipt should only be attached with removeable tape or by some other means that will not damage the item when the transit receipt is removed.

- The transit receipt for magazines should be attached by paperclip. Magazines should be transited in envelopes of the appropriate size to protect the item.
- Items should be appropriately packaged to protect them from damage while in transit. Libraries are encouraged to re-use/recycle envelopes and other packaging material to protect items.
- Multiple part items such as “kits” or “realia” should transit with an inventory detailing all the parts. The inventory should include a list of all parts and the barcode. The transiting and receiving libraries should review and confirm all parts are sent and received. The inventory should be checked again when it is returned by the patron and before the item is checked-in. No item should be checked-in if a part is missing. The patron should be informed of any missing parts. The inventory list should be checked again when the item is prepared for transiting back to the owning library and again upon receipt at the owning library. An example of an inventory is attached hereto as Appendix B.

Intra-Evergreen Indiana Lending Circulation Periods and Costs

Materials will retain the *same* circulation period regardless of whether the patron is local or from another Evergreen Indiana library. When thinking of Intra-Evergreen Indiana lending, it is important to remember that an Evergreen Indiana patron is a patron exactly like your local patron. Intra-Evergreen Indiana Lending loans are *not* Inter-Library Loans (ILL) – they are simply circulations like any other.

Holds and Intra-Evergreen Indiana Lending

Holds may be placed on most items in any Evergreen Indiana library (see list of exceptions below). If a patron presents the on-hold item for checkout before it is retrieved for the requesting hold patron, the in-house patron with item in hand receives preference; a circulation supervisor will override the hold and check out the item to the in-house patron. The requesting hold patron will be next in line for the item.

Patrons will have one week after the hold is filled to pick up the held item. Some Evergreen Indiana libraries may impose a fee for failure to pick up the held item.

Patrons may have 20 unfilled holds in the system. Evergreen deletes unfilled holds older than nine (9) months old.

Evergreen Indiana does not allow holds to be placed on the following items by any patron:

- Reference materials
- Bestsellers with the no-hold designation

Evergreen Indiana does not allow Evergreen Indiana library patrons to place holds that would generate Intra-Evergreen Indiana loans on the following item categories:

- Art
- Bestsellers
- New Books
- CDs
- DVDs
- ILL
- Equipment
- Media
- Realia
- Reference
- Software
- Software - Gaming
- Talking Book
- Videocassettes

Although holds may not be placed on the above materials by a non-local patron, these items *may* be borrowed by any Evergreen Indiana library card holder. It is the responsibility of the patron to proceed to the owning library and check out the material. The patron may return such materials to any Evergreen Indiana library for transit to the owning library.

In addition, a library may place a six-month age protection on new items. This means that no holds generating Intra-Evergreen Indiana loans may be placed on new items until the owning library has held such item in its collection for six months. Local patrons may place holds on such items.

For other item types, a title-level hold will find the first available copy of the title in Evergreen Indiana to fill the hold. The Holds report will first look for an available copy in the patron's pickup library, then in the pickup library's system; if no copy is available, it will then select a copy from another Evergreen Indiana library.

Patrons may place their own holds via the OPAC, and may select their pickup location and notification method. The software will refuse holds requests which do not conform to Evergreen Indiana policies (*e.g.*, An attempt by a Reciprocal Borrower to place a hold on an item not owned by the library issuing his or her card.) Patrons may choose any pickup location for holds.

Patrons whose Evergreen Indiana cards are "blocked" or "barred" will not be allowed to place holds until their card privileges are restored.

The following sets forth the status and hold/unholdable relationship:

Available - holdable
 Bindery - unholdable
 Cataloging – unholdable

Claimed Returned - holdable
Checked-out - holdable
Damaged - holdable
Discard/Weed - unholdable
ILL - unholdable
In Process - holdable
In Transit -- holdable
Long Overdue - unholdable
Lost – unholdable
Mending – holdable
Missing - unholdable
On Holds Shelf - holdable
On Order - holdable
Reserves - unholdable
Reshelving - holdable
Temporarily Unavailable - unholdable

Member Library Support and Communication

Each Member Library is required to have at one staff member subscribed to the Evergreen Indiana Support ListServ. Subscription requests may be submitted at:
http://lists.in.gov/mailman/listinfo/evergreen_support.

Each Member Library is required to provide the name, email and phone number of a staff member who will serve as a contact person for circulation questions from another member library. This information should be provided to the Evergreen Indiana project manager for distribution to the member libraries.

Adopted by the Evergreen Indiana Executive Committee on: May 12, 2009.

APPENDIX A **Patron User Group Matrix (shows limits, expiration periods, etc.)**

APPENDIX B **Example of Inventory List**

APPENDIX A Patron User Group Matrix

User	Term	Max Items Out: General dvd/ videos/ gaming software/ art	Fine Limit	Overdue Limit	Notes
Resident	2 years	100/10/10/1/6	\$10.00	15	
Resident – Limited Access	2 years	100/10/10/1/6	\$10.00	15	No access to “R” av
Reciprocal Borrower	1 year	100/10/10/1/6	\$10.00	15	Access to consortium limited to the EI library issuing the card
Reciprocal Borrower – Limited Access	1 year	100/10/10/1/6	\$10.00	15	Access to consortium limited to the EI library issuing the card; No access to “R” av
NonResident	1 year	100/10/10/1/6	\$10.00	15	
NonResident – Limited Access	1 year	100/10/10/1/6	\$10.00	15	No access to “R” av
OutReach	2 years	100/10/10/1/6	\$10.00	50	
Student	1 year	100/10/10/1/6	\$10.00	15	IC 36-12-2-25(d) Public School Student Card; Access to consortium limited to the EI library issuing the card
Student – Limited Access	1 year	100/10/10/1/6	\$10.00	15	IC 36-12-2-25(d) Public School Student Card; Access to consortium limited to the EI library issuing the card and no access to “R” rated av
Computer Usage	1 year	NA	NA	NA	Computer use only; No ability to check out any type of material or resource
Temp	1 year	100/10/10/1/6	\$10.00	15	
ILL	NA	UL	\$10.00	NA	
PLAC	1 year	100/10/10/1/6	\$10.00	15	
PLAC – Limited Access	1 year	100/10/10/1/6	\$10.00	15	No access to “R” rated av
Staff Card	2 years	100/10/10/1/6	\$10.00	15	Exempt from daily overdue fines.

APPENDIX B

Example of a Transit Inventory

Owning Library Confirmation Upon Transit

Date: November 20, 2010

Owning Library Name: Best Library

Item Description: [4 part kit consisting of 1 paperback, 1 doll, 1 cd and 1 dvd]

Item Barcode: 3 5555 89899 0001

Items Confirmed for Transit: Paperback (yes); Doll (yes); cd (yes); dvd (yes)

Receiving Library Confirmation Upon Receipt

Date: November 22, 2010

Owning Library Name: Best Library; Receiving Library Name: Ultimate County Library

Item Description: [4 part kit consisting of 1 paperback, 1 doll, 1 cd and 1 dvd]

Item Barcode: 3 5555 89899 0001

Items Confirmed for Transit: Paperback (yes); Doll (yes); cd (yes); dvd (yes)

Receiving Library Confirmation Upon Patron Return

Date: December 12, 2010

Owning Library Name: Best Library

Item Description: [4 part kit consisting of 1 paperback, 1 doll, 1 cd and 1 dvd]

Item Barcode: 3 5555 89899 0001

Items Confirmed at Check-In: Paperback (yes); Doll (yes); cd (yes); dvd (yes)

Receiving Library Confirmation at Transit Back to Owning Library

Date: December 13, 2010

Owning Library Name: Best Library

Item Description: [4 part kit consisting of 1 paperback, 1 doll, 1 cd and 1 dvd]

Item Barcode: 3 5555 89899 0001

Items Confirmed for Transit: Paperback (yes); Doll (yes); cd (yes); dvd (yes)

Owning Library Confirmation Upon Return Receipt

Date: December 18, 2010

Owning Library Name: Best Library

Item Description: [4 part kit consisting of 1 paperback, 1 doll, 1 cd and 1 dvd]

Item Barcode: 3 5555 89899 0001

Items Confirmed upon Return from Transit: Paperback (yes); Doll (yes); cd (yes); dvd (yes)