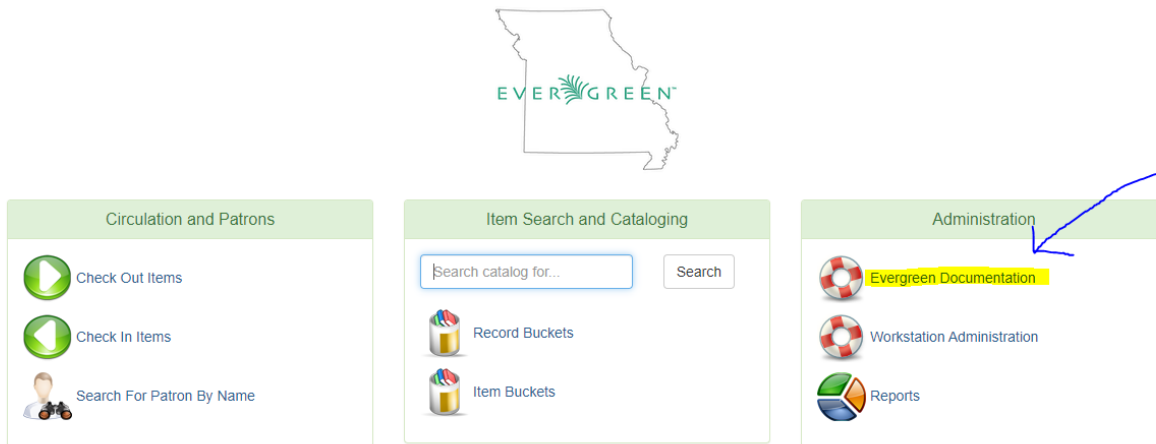


Missouri Evergreen Circulation Orientation

Staff of Missouri Evergreen libraries are available to help other member libraries be successful in their daily use of Evergreen. Use the list of contacts in the Missouri Evergreen website to find contact information for library directors, catalogers, and circulation leaders <http://moevergreenlibraries.org/contact-info/> Contact information for Missouri Evergreen Executive Board members can also be found on the website <http://moevergreenlibraries.org/board/> Reach out when you have questions, problems, and suggestions.

On the home page of Evergreen, there is a link to **Evergreen Documentation** created by the Evergreen International Documentation Interest Group that is worth a look. Each step of each function in Evergreen is broken down into simple steps.



Circulation resources specific to Missouri Evergreen can be found on the Missouri Evergreen website <http://moevergreenlibraries.org/circulation-training-materials/> . A short description of those resources follows here.

1. [Missouri Evergreen Circulation Policy](#) - The Circulation Policy is approved by the membership and describes the responsibilities for borrowing and lending materials in the consortium. Each library should check their pull list at least once a day and be diligent about getting materials to the courier quickly and efficiently. Any item that is allowed to leave the building with the owning library's patrons must be shared with all member libraries. (An exception is made for fragile items such as telescopes and microscopes.) Patrons should contact their home library rather than the lending library if they have questions. Patron payment for lost and damaged items is made to the patron's home library. The owning library will bill the patron's library for lost and damaged items. The policies of the borrowing

library govern loan periods. The policies of the owning library govern billing for loss and damage. An important part of the Circulation Policy is the Materials Handling Best Practices document described below. Please read the entire Circulation Policy carefully.

2. [Circulation Training 1](#) and [Circulation Training 2](#) - Member libraries sometimes share their in-house training materials with the consortium. These two resources are used by a member library when training new circulation staff.
3. [Materials Handling](#) - Thousands of items cross the state daily between Missouri Evergreen libraries. *Care must be taken to ensure that items arrive **safely at the correct location**.* AV must be wrapped in bubble wrap. Items in poor condition should not be shared. No tape or zip-ties should be used. Member libraries should follow through with transits and requests, taking action on monthly transit and hold reports and monitoring their own Transit List. Please read the entire Materials Handling policy carefully.
4. [Accounting for Lost and Damaged Items](#) - These instructions explain changing an item's status to Lost or Damaged and following through with other consortium member libraries when the damage involves more than one library.
5. [Checking the Transit List](#) - Check the Transit List regularly to keep on top of items that have gone missing in the courier or have been shelved without being checked in.
6. [Unfillable Holds & Long In Transit reports](#) - Equinox sends monthly reports which contain information about holds that can no longer be filled and requested items that have been in transit to fill holds for more than thirty days.
7. [Our Patron Damaged an Item Belonging to a Different Library](#) - This is a form that will help you walk through the steps to follow when one of your patrons damages an item belonging to a different Missouri Evergreen member library.

8. [A Patron From Another Library Damaged Our Items](#) - This is a form that will help you walk through the steps to follow when a patron from a different library damages an item belonging to you.
9. [Canceling Transits](#) - Sometimes after an item has been set to transit to another library, it is necessary to cancel the transit. These instructions explain how to do that correctly.
10. [Borrowing Reference Materials through Missouri Evergreen](#) - Reference is usually not holdable. On the rare occasion when a library is willing to share a reference item with another library, follow these instructions.
11. [Borrowing Book Club Kits](#) - Several Missouri Evergreen libraries loan kits containing multiple copies of a title to individuals and other libraries for use by book discussion groups. Information about how to borrow kits from those libraries can be found here.
12. [Videos](#) - The video library lets you see how to perform specific functions.
13. [Committee Meeting Minutes](#) - The Circulation Committee meets monthly. Notes from the meetings can be found here.
14. [Reciprocal Borrowing Agreement](#) - Missouri Evergreen has an internal reciprocal borrowing agreement which you can read here.
15. [Evergreen Item Condition Report](#) - When an item belong to a different library arrives to fill a hold at your library and it is not in good condition (for example, the spine is broken, there are damaged pages, etc.), complete this form and keep it with the item so that the owning library knows it was damaged before your patron checked it out.

16. [Library Billing Template](#). - Use this form when sending an invoice to a Missouri Evergreen library for a lost or damaged item.

Miscellaneous

You can expect that 4-8% of your circulation will be items borrowed from outside of your library. In addition, you will loan to other libraries about the same number of items as you borrow. That means a lot of items will be coming to and going from your library. Here is an example: If your annual circulation is 20,000, you will borrow an additional 1,600 as a member of Missouri Evergreen, raising your annual circulation to 21,600. You will also loan about 1,600 items. You need to have staff and work space to sort and prepare for transit 3,200 items per annum.

Holds target specific items. They can only be filled by that specific item. If the library owning that item doesn't fill the hold within twenty-four hours, a different item on the same catalog record will be targeted to fill the hold.

Every library has its own circulation settings and policies. Those policies cannot be applied to patrons at other libraries. For example, Library A doesn't allow patrons to check out materials if they owe \$10 in bills and Library B doesn't allow patrons to check out materials if they owe \$5 in bills. Library B cannot refuse to loan an item to a patron at Library A who owes \$8.