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I. Circulation Guidelines

Scenic Regional Library provides its patrons with materials in multiple formats. In order to provide fair and equitable access to these materials, Scenic Regional Library places limits on number of checkouts, lending periods, renewals, and bills.

Any individual with a valid Scenic Regional Library card may check out materials. Library patrons are strongly encouraged to have their own library card with them while in the library. Staff may also look up a patron’s account if the individual provides valid identification. The individual must provide two points of qualifying identification information such as birthdate, address, or phone number if the patron does not have a valid ID.

Patrons may check out a maximum of 100 total items. Scenic Regional Library items or items from other Missouri Evergreen libraries may usually be borrowed for two (2) weeks. Patrons may also check out non-traditional materials. These items have specific borrowing guidelines and are subject to different replacement costs.

Patrons with barred accounts are prohibited from all library privileges. SRL suspends library privileges of patrons owing $10.00 or more and of patrons who violate the Scenic Regional Library Behavior Policy.

Scenic Regional Library is a member of Missouri Evergreen, a consortium of libraries that share a catalog and Integrated Library System (ILS).
II. The Patron Record in Evergreen

A. Overview

When you retrieve a patron’s record, a screen with three areas appears:

- The patron’s information appears on the left. Action buttons appear along the top of the patron record. The right side of the patron record will change depending on which action button is selected. The patron’s name will appear at the top left corner of their record. The name will be **RED** if the patron has holds, overdue materials, messages, or bills.

B. Action Buttons

Along the top of the patron record is a set of action buttons. These buttons allow you to do a variety of functions within the patron record.

- **Check out** – This is the button used to check out items to a patron.
- **Items Out** – This displays a list of all items checked out to the patron’s account.
- **Holds** – This displays the list of all items requested by a patron.
- **Bills** – This displays a list of all bills on a patron’s account.
- **Edit** – This button allows you to update a patron’s information.
Scenic Regional Library Circulation Procedures

- **Notes** – This will display notes, alerts, and blocks on a patron’s account. For more detailed information, see *Alerts and Messages*.
- **Other** – This dropdown box shows more advanced options in a patron’s account.

Each of these screens, except Checkout and Edit, has an **Actions for Selected Items** menu. This menu gives you access to many commands for the highlighted rows or items. These commands will vary depending on which screen you access.

Furthermore, each screen, except Edit, has the **Column Picker** on the far right of the screen. This button allows you to select specific columns to display on the screen. The column choices will vary depending on which screen you access. If a checkmark appears by an item in the list, that column is displayed on the screen.

On some pages, the Column Picker is a gear rather than a downward pointing arrow.
Each screen has a **Print** button as well. Use this button to print lists of checkouts, bills, holds, patron information, etc. Alternatively, you can **Print Full Grid** from the **Column Picker** for a report with a different format from the report generated by **Print**.

### C. Notes, Alerts, and Blocks

There are three kinds of notices that can be added to a patron’s account.

**Notes** are for information only. They do not automatically appear on a patron’s account when the account is accessed. Staff must click on the Notes tab to see the note. For example, a Note is created when a patron has been forgiven for a Lost item. Notes appear as SILENT NOTE in the patron’s list of Notes.

![Create Note](image)

<table>
<thead>
<tr>
<th>#</th>
<th>Penalty Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SILENT NOTE</td>
</tr>
</tbody>
</table>

**Alerts** contain information that staff need to see immediately when the patron account is accessed. When there is a staff created alert on the patron’s account, the name appears in **RED**. Staff may add Alerts for a variety of reasons, for example, a library card was found in the parking lot or the patron has been charged for damage.

Some **Alerts** are automatically generated by the ILS, such as notes about available holds. These alerts cause a STOP sign to appear on the patron’s home screen and also create a **RED** patron name.

![Stop Sign](image)

**Holds available. 2**

**Press a navigation button above (for example, Check Out) to clear this alert.**
**Blocks** restrict a patron from checking out, renewing material, placing requests, and using library computers. Blocks are added to patron accounts by the ILS when the patron has fines or the account is expired and by staff when patrons have violated SRL behavior policies.

If you attempt to check out to a patron and see the pop-up message STAFF_CHR, you will know that the patron has a block on the account created by STAFF and that the account is blocked from Circulation – Holds – Renewals (CHR).

---

**Adding Notes**

1. Select **Notes** in the patron’s account.
2. Select **Create Note**.

3. Select **Note, Alert, or Block**.
4. If you want the patron to be able to read the note in his online account, check the Patron Visible box.
5. Leave the Depth and Location fields as they default.
6. In the Title box, enter a few words to explain the Note/Alert/Block.
7. In the Note Text box, enter a detailed explanation.
8. Enter your branch abbreviation and your initial in the Initials box.
9. Click OK.

Alerts created by the ILS are removed automatically by the ILS when the issue is resolved. Alerts about account expiration disappear when the account is updated. Alerts about bills disappear after fines have been paid.

Notes, Alerts, and Blocks created by staff may be Removed, Edited, or Archived.
Removing/Editing/Archiving Messages

1. From the Notes screen, select the Alert that needs to be edited, removed, or archived.
2. Use the Actions menu to select the action that you want to perform.
3. Removing the note takes it off of the patron’s account.
4. Edit Note allows you to change the text in the Title and the Note Text.
5. Archiving the note moves it to the Archived Notes field at the bottom of the Notes page. There is currently no way to delete an Archived Note.

IMPORTANT: Notes need to be thorough so that any staff person reading them knows exactly what is going on in the patron’s account. This is an example of an Alert about a damaged item.

Title: DAMAGE

Note Text: One Dark Night by Leon Sweep, 3001234567, pages 115 through 205 have extensive liquid (coffee?) damage. Item will be held at WC until March 15, 2019 – 1/15/2019

Initials: WC-AZ
III. Patron Registration

A. Patron Search

Before registering a patron for a library card, ensure that the individual does not already have an account with SRL or a bill at another Missouri Evergreen library. Follow these steps:

1. Click on Search for Patrons in the Search menu or Search for Patron by Name in the Circulation and Patrons column.
2. Click the down arrow at the right of the search fields to Show More Fields.
3. Make sure that the box next to Include inactive patrons? is checked.
4. Make sure that the library search dropdown box is set to ME.
5. Type in a few letters of the patron’s last and first name. The entire name doesn’t need to be entered.
6. Click the blue Search button. Verify possible duplicates by comparing birthdates.
Note: There is a search field for parent’s name that will help you find all children registered by the same parent.

B. Existing Accounts

Scenic Regional Library Accounts

If a patron has an existing SRL account and needs a replacement card, one may be issued for $1.00. Please see Replacement Cards for more information. If a patron owes money to the library, the amount owed must be below $10.00 before he can use the card (see Billing for payment procedures).

If it is discovered that a patron has multiple SRL accounts or an active SRL and Washington Public Library account, all accounts should be merged into the account the patron used most recently. Only merge SRL/WPL accounts. Do not merge SRL accounts with ME library accounts.

To merge patron accounts:

1. Perform a Patron Search to find the accounts that need to be merged.
2. Check the accounts to be merged.
3. Click the Merge Patrons action button.
4. The resulting screen will show the details of the accounts to be merged.
5. Fill in the radio button for the account that you want to Use as Lead.
6. Click the Merge button at the bottom right of the page.
MO Evergreen Accounts

If a patron owes more than $10 to a MO Evergreen library, they must contact that library and pay the bill before they can be issued a Scenic Regional Library card. Payment must be made to the billing library. Scenic staff may only accept payment of money owed on an SRL or Washington Public Library account.

C. Eligibility Types

There are several ways for a person to be eligible for a Scenic Regional Library account. The eligibility type is recorded at the bottom of the registration form as the Statistical Category.

**Homebound** cards are free and may only be issued to patrons who are restricted to their home or a care facility due to health reasons and are eligible for Books-by-Mail. These accounts are only created by the SRL Books-by-Mail coordinator.

**Institution** cards are issued to staff of assisted living facilities and to teachers. Staff may be issued a card in the name of the institution so that they may check out materials to be used by residents or students. Staff status must be verified by ID badge or pay stub or letter from employer. If more than one person will use the account, enter the names of all users in a Note on the account.

1. Enter the patron name using this formula
   First name – staff person’s last name
   Middle name – name of the institution or school
   Last name – type of institution or school
   Example – Smith Victoria Place Assisted Living
   Example – Jones Living Oak Elementary
2. Enter the staff person’s birthdate so that they can easily access the OPAC with the birthdate as the password.
3. Primary Identification Type is Other.
4. Primary Identification is Institution Staff.
5. Parent/Guardian is the full name of the staff member.
6. The institution’s address and phone number are used for these accounts.
7. Statistical Category is Institution.
Non-Resident Taxpayers do not live in the SRL district but own property in the SRL district and may obtain an SRL library card free of charge. They need to provide proof of real property ownership (property tax bill, receipt, or other verification from the county tax assessor) at the time of registration and each year when the account is renewed. Their home address is entered as their mailing address and the address of their in-district property is entered as the physical address with the address type of Non-Resident Taxpayer. Add a message to the Non-Resident Taxpayer patron’s record that includes names and barcode numbers of any family members who are also being issued cards. Add a message to each family member’s record that includes the name and barcode number of the patron who provided verification of property ownership. Family is defined as parents and children living in the same household.

Non-Resident cards are $50.00 per year per household and may be issued to patrons who are not Residents, Reciprocal Borrowers, or Non-Resident Taxpayers. When a patron pays for a non-resident card, add a message to that patron’s record that includes names and barcode numbers of any family members covered by the fee. Add a message to each family member’s record that includes the name and barcode number of the patron who paid the non-resident fee. Add the date paid, branch code, and staff initials on all messages. Family is defined as parents and children living in the same household.

Reciprocal Borrower cards are free and may be issued to patrons living inside a library district with which Scenic Regional Library has a reciprocal borrowing agreement.

Reciprocal Libraries

- Washington Public Library (patrons living within the 1965 city limits of Washington – see map at circulation desk)
- East Central College (all students and staff may get SRL cards)
- Heartland Regional Library System (Maries and Miller Counties)
- Missouri River Regional Library (Cole and Osage Counties)
- Ozark Regional Library (Iron and Madison Counties)
- Washington County Library
- Crawford County Library
- St. Charles City-County Library
- St. Louis County Library

Resident cards are free and may be issued to patrons who live within the Scenic Regional Library district. Anyone living in Franklin, Gasconade, and Warren Counties, and within the 1965 city limits of the city of Sullivan is eligible for a Scenic card.

Staff Member cards are free and only issued to Scenic Regional Library employees.
D. Identity and Address Verification

Individuals must provide proof of identity and proof of address in order to receive a Scenic Regional Library card. Patrons may bring a Missouri Driver or Non-Driver License to verify both identity and address. Alternatively, patrons may present one form from each of the below categories:

<table>
<thead>
<tr>
<th>Photo ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Passport</td>
</tr>
<tr>
<td>• Out of State Driver’s License</td>
</tr>
<tr>
<td>• Federal or Military ID</td>
</tr>
<tr>
<td>• Company Photo ID Badge</td>
</tr>
<tr>
<td>• Student/School ID</td>
</tr>
</tbody>
</table>

AND

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Bank printed check with current address or bank statement</td>
</tr>
<tr>
<td>• Mail received at the current address</td>
</tr>
<tr>
<td>• Recent Utility Bill</td>
</tr>
<tr>
<td>• Local Election Mailing</td>
</tr>
<tr>
<td>• We can send a letter to the patron’s address. The patron then uses receipt of that letter as address verification.</td>
</tr>
</tbody>
</table>

Individuals under the age of 16 are not eligible for a Scenic Regional Library card without a parent or legal guardian present. The parent or legal guardian must provide proof of identity and address. They must also provide proof of guardianship if not the child’s parent. The parent should sign the child’s library card.

E. New Patron Registration
Scenic Regional Library uses a paperless library card application process. All information is directly entered in the Patron Registration screen. The patron signs the card for himself and for children under the age of sixteen.

Complete each field in the registration form as described in the spreadsheet below. Complete the form in ALL CAPITALS.

<table>
<thead>
<tr>
<th>Identifying Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcode</td>
<td>Scan the new library card barcode</td>
</tr>
<tr>
<td>OPAC Username</td>
<td>Will automatically populate with the barcode from above</td>
</tr>
<tr>
<td>Password</td>
<td>Erase the digits and enter the patron’s DOB ex. 12/3/1970</td>
</tr>
<tr>
<td>Prefix/Title</td>
<td>Enter prefix or title if patron’s requests it</td>
</tr>
<tr>
<td>First Name</td>
<td>Enter the patron’s first name</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Enter the patron’s middle name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter the patron’s last name</td>
</tr>
<tr>
<td>Suffix</td>
<td>Enter suffix (Jr., II, etc.) if the patron’s name includes one</td>
</tr>
<tr>
<td>OPAC Alias</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>Enter DOB in this format - mm/dd/yyyy</td>
</tr>
<tr>
<td>Juvenile</td>
<td>Will automatically check if patron is under 18-years-old</td>
</tr>
<tr>
<td>Parent/Guardian</td>
<td>Enter parent’s first then last name if patron is under 16</td>
</tr>
<tr>
<td>Primary ID Type</td>
<td>Choose from the dropdown menu</td>
</tr>
<tr>
<td>Primary ID</td>
<td>If you chose “Other” above, enter the type of ID used</td>
</tr>
<tr>
<td>Secondary ID Type</td>
<td>If the Primary ID doesn’t verify address, select Other here</td>
</tr>
<tr>
<td>Secondary ID</td>
<td>Describe address verification here</td>
</tr>
<tr>
<td>Email Address</td>
<td>Ask if the patron would like to provide an email address</td>
</tr>
<tr>
<td>Email checkout receipts by default</td>
<td>Ask if the patron would like receipts emailed</td>
</tr>
<tr>
<td>Daytime Phone</td>
<td>Enter a phone number including dashes</td>
</tr>
<tr>
<td>Evening Phone</td>
<td>Enter a second phone number if offered by patron</td>
</tr>
<tr>
<td>Other Phone</td>
<td>Enter your branch’s abbreviation and your initials</td>
</tr>
<tr>
<td>Home Library</td>
<td>Defaults to your branch. May need to be changed for Washington residents</td>
</tr>
<tr>
<td>Main (Profile) Permission Group</td>
<td>Select the appropriate group from the dropdown menu</td>
</tr>
<tr>
<td>Privilege Expiration</td>
<td>Will automatically populate</td>
</tr>
<tr>
<td>Internet Access Level</td>
<td>Leave as default (Filtered)</td>
</tr>
<tr>
<td>Active</td>
<td>Leave checked</td>
</tr>
<tr>
<td>Barred</td>
<td>Leave unchecked</td>
</tr>
<tr>
<td>Is Group Lead</td>
<td>Leave unchecked</td>
</tr>
<tr>
<td>Claims Returned</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Claims Never Checked Out</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Alert Message</td>
<td>Leave blank</td>
</tr>
</tbody>
</table>

**User Settings**

| Default Phone          | Enter phone number including dashes |
| Default Hold Pickup    | Select a branch from the dropdown menu |
| Collections:Exempt     | Leave unchecked |
Scenic Regional Library Circulation Procedures

<table>
<thead>
<tr>
<th>Hold Notices</th>
<th>Ask the patron’s notification type preference and check the box(es)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default SMS/Text</td>
<td>Enter mobile phone number if text notification is selected</td>
</tr>
<tr>
<td>Default SMS Carrier</td>
<td>Choose a carrier from the dropdown menu if text is selected</td>
</tr>
<tr>
<td>Receive … emails</td>
<td>Ask if the patron wants to receive email courtesy notices</td>
</tr>
<tr>
<td>Allow others to use my account</td>
<td>Ask the patron if others should be allowed to use the account. Click Add Person and complete the information if the answer is Yes.</td>
</tr>
</tbody>
</table>

**Address**

<table>
<thead>
<tr>
<th>Address</th>
<th>Leave both boxes checked if the patron receives mail at physical address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Leave field populated with Mailing</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Enter the Zip Code</td>
</tr>
<tr>
<td>Street (1)</td>
<td>Enter the street address using abbreviations and no punctuation</td>
</tr>
<tr>
<td>Street (2)</td>
<td>Use only if patron has an apartment number</td>
</tr>
<tr>
<td>City</td>
<td>Will populate when Zip Code is entered. Change to all capital letters.</td>
</tr>
<tr>
<td>State</td>
<td>Will populate when Zip Code is entered.</td>
</tr>
<tr>
<td>County</td>
<td>Will populate when Zip Code is entered. Doesn’t need to be capitalized.</td>
</tr>
<tr>
<td>Valid Address?</td>
<td>Leave checked</td>
</tr>
<tr>
<td>Within City Limits</td>
<td>Leave unchecked</td>
</tr>
</tbody>
</table>

**Statistical Categories**

| Patron Type                      | Select the patron type from the dropdown menu                    |

**Main (Profile) Permission Groups**

Scenic uses three patron Permission Groups: Patrons, Internet Only, Probationary Patrons.

**Patrons** – Everyone not included in the other two groups.

**Internet Only** – Patrons who complete the online registration form are issued accounts that are good only for our online resources (eBooks, eAudiobooks, eMusic, eMagazines, and databases).

**Probationary Patron** - Accounts are created for patrons who don’t have a permanent address. This includes people who are experiencing homelessness or are living in a shelter. For patrons who do not have an address, enter the branch’s address in the address fields.
The Library Director or Assistant Director should be consulted on a case-by-case basis before an account is created for patrons in this group. People living in a shelter will have verification of that situation. Patrons in the Missouri Safe-at-Home protection program will provide a Jefferson City PO Box number for their address. **ONE card should be created per family group.** Probationary Patrons may check out three items at a time and their expiration date will be automatically set to three months after the card is issued.

### Allow Others to Use My Account

When registering a new patron, ask if they want to allow others to use their library account to Place Holds, Pick Up Holds, View Borrowing History, and/or to Check Out Items. Make sure patrons know they are responsible for everything checked out on the account. If the patron wants to give someone else permission to use the account, click the green Add Person button, enter the name of the person(s) who may use the account, and check the box(es) to indicate what the person may do.

### Address Information

Addresses should be entered into Evergreen according to USPS guidelines:
Scenic Regional Library Circulation Procedures

JOHN RICHARD SMITH
123 ALABASTER LN
UNION MO 63084

When entering addresses, use ALL CAPS and no punctuation.

Complete the following fields in their entirety. Note that the city and county fields will be automatically populated once the Postal Code is entered. Change the city field to ALL CAPS. The county need not be changed from lower case.

Patrons may not receive mail where they reside. In those cases, enter a Mailing address then open New Address to enter a Physical address. A residence address is required to have a Scenic Regional Library card.

Individuals in the Safe At Home program are not required to provide a residence address, but are required to provide documentation of their involvement in the program. Safe At Home is a state program that provides anonymous shelter to victims of domestic abuse. Participants are given a PO Box in Jefferson City.

To enter the Physical address, follow these steps:

1. Click New Address.
2. Check the Physical box.

3. In the Type field, replace MAILING with PHYSICAL.

4. Complete the rest of the address fields in their entirety.

**Non-resident Taxpayer Addresses**

Persons who own property in the SRL district may obtain an SRL library card even if they don’t live in the SRL district. Their mailing address is entered in the registration form as for all other patrons. A physical address is entered listing the address of the property owned inside our library district.

1. Click New Address to enter their in-district property address.

2. Check the Physical box.

3. In the Type field, replace MAILING with NON-RESIDENT TAXPAYER.
Statistical Categories - Patron Type
Most of our patrons will be registered as Resident, which means they live in our three county service area. Other options are described in Section C Eligibility Types and listed below.

*Bookmobile* – Not used

*Homebound* – This is for patrons who receive Books-By-Mail. They are registered by the Books-By-Mail coordinator.

*Institution* – This is for day care centers, nursing homes, and any other business that does not receive bookmobile serve and wants to check out materials for its clients. See Section C Eligibility Types for instructions on registering these patrons.

*Non-resident* – These patrons live outside of our service area and must pay a non-resident fee.

*Non-resident taxpayer* – These residents live outside of our service area but own property inside our service area. They must provide proof of ownership (a paid tax receipt, tax bill, or other verification from the tax assessor) when registering and each year when their accounts are updated.

*Reciprocal borrower* – We have reciprocal agreements with Washington Public Library, East Central College (all campuses, students and staff), Ozark Regional Library, Washington County Library, Missouri River Regional Library, Crawford County Library, St. Charles City-County Library, Heartland Regional Library, and St. Louis County Library. We issue free cards to patrons living in these library districts and our patrons may get free cards in those districts. There is a laminated sheet with Reciprocal Libraries listed, including counties covered by each library district, at your branch Service Desk.

*School registration* – Use this stat cat when registering a child from information provided by the school.

*Staff* – This is anyone who receives pay for working at Scenic Regional Library.

*Temporary resident* – Not used

*WPL Teacher* – Not used
After completing the registration form, click on the **Save** button. Patrons cannot use library services until the information is saved in the Evergreen system. **DO NOT use Save and Clone.**

After the account has been successfully entered into Evergreen, have the patron sign their name on their new library card. Parents should sign their children’s cards.

### F. Replacement Cards

If a patron has lost their Scenic Regional Library card, staff may issue a replacement card. There is a fee of $1.00 for this service.

To assign a patron a new card, follow these instructions:

1. Verify the patron’s identity with a Photo ID or by verifying information in the record.

2. Open the **Patron Search** screen.

3. Make sure that the box next to **Include inactive?** is checked.

4. Make sure that the dropdown box search parameter field reads **ME**.

5. Perform a search for the patron.

6. Check the box next to the patron’s name to retrieve the account.

7. Click the **Edit** button.
8. Click the Replace Barcode button.

9. Scan a new library card into the Barcode and OPAC fields.

10. Unless the patron wishes to keep a previous password, enter the patron’s birthdate, with slashes, as the new password. Inform the patron of their new password, and that they can change the password at home.

11. Make any necessary changes to the patron’s information.

12. Make sure that a default phone number is entered and the pickup location is correct.

13. Update their expiration date by clicking the Update Expire Date button. This will change their expiration date to one year from today’s date.

14. When finished updating the patron’s account, click the Save button and have the patron sign their new card.

15. In the patrons Bills screen, add a grocery bill for $1.00 and apply the payment.

G. Expired Patron Accounts

Patron accounts expire on the anniversary of the creation of the account. A courtesy email is sent to patrons, warning them that their account is about to expire and that they need to contact the library to extend their privileges. Expired accounts cannot be used to check out materials or use internet services. Patrons must visit or telephone a branch in order for staff to extend the expiration date for another year.

To update the expiration date, open the patron’s Edit screen, ask the patron to verify all contact information and hold notification information. For the patron to say, “Nothing has
changed,” does not verify the information in the patron database. Make any necessary changes then click **Update Expiration Date.** Click **Save** to save the new data and new expiration date.

![Privilege Expiration Date](image)

**H. Online Registration**

Patrons may register for a library account online through the Online Public Access Catalog. This registration will result in an account that will give them access to our online resources. If patrons want to also check out physical materials, they may submit an online registration and then bring photo ID to a branch to upgrade their permissions from Internet Only (online resources only) to Patrons (full access to library materials).

1. After clicking **Request Scenic Library Card**, the patron completes a simple form.

![Request a Library Card](image)

2. After clicking **Submit Registration**, the patron sees confirmation that the registration was successful.
Every day, branch staff check the **Pending Patron** file in the **Circulation** tab.

1. If there is a pending patron in the **Pending Patron** list, perform a **Patron Search** to make sure the patron doesn’t already have an account.

2. If he does have an account, contact him to let him know.

3. If the patron doesn’t have an account and doesn’t live in our service area or a reciprocal service area, contact him to let him know that nonresidents pay $50 annually and the fee must be paid before an account can be created. In branches where the city name doesn’t
guarantee that the applicant lives in our district, an internet search or other means of residence verification will need to be sought to verify the patron lives in our district. If living outside of our district, he will complete registration for a library account in the branch when he pays the non-resident fee.

4. If the patron doesn’t have an account and lives in our service area (Scenic district or a reciprocal district), click Load Patron. The patron information will be loaded into a Patron Registration form.

5. Complete the Patron Registration form. The Patron Permission group must be Internet Only. This allows patrons to use our online resources but not check out physical materials.

If the patron has provided an email address, he will receive an email registration confirmation that includes his library account number. He may use that number to access online resources as soon as staff Save the registration.

6. Mail the library card, a Welcome brochure, and an online registration explanation letter to the patron. The letter (available on the staff intranet in the Circulation-Forms folder) explains that if the patron wants to check out physical materials, he must bring photo ID to the library. Add an Alert to the patron’s account – Title: Internet Only. Text: Card mailed Date. Branch and Staff initials

7. Mailing the card is how we are verifying the patron’s address. If it is returned as undeliverable, Block the account and email the patron asking her to bring ID and address verification to the branch.

8. If the patron brings photo ID into the branch to upgrade his account to full use, change the permission group from Internet Only to Patrons and complete all other information as you do for every patron (primary ID type, default phone, holds pickup location, etc.)
IV. Checkout Procedures

After retrieving a patron’s account either by scanning a library card or searching for the record, an alert may appear. These alerts may need to be addressed before a patron is able to checkout. More information about alerts and notes can be found in *Notes, Alerts, and Blocks*.

A. Standard Checkout

Using Check Out in Evergreen, scan the patron’s library card. If a patron cannot present a Scenic Regional Library card, staff may also look up the patron’s record with a valid ID. If the patron has neither his library card nor a photo ID with him, you may ask for his name and have him verify two points of identity (birthday, address, phone number). The left side of the checkout screen displays the patron’s information, including contact information and account status.

Always check items for obvious damage before checking them out to the patron. Ensure that audio-visual materials have all pieces in the case.

Check out items by placing them on the RFID pad. Up to four items may be placed on the pad together. The barcode, due date, and title will appear in the checkout list. Always watch the screen to make sure the ILS is capturing the data for all of the items.

When all items are checked out, ask the patron if a receipt is wanted. If the patron doesn’t want a printed receipt, use the dropdown menu next to the **Done** button at the bottom of the screen to select No Receipt. If the patron does want a printed receipt, click the **Done** button.

Items that don’t belong to SRL and therefore don’t have RFID tags, must have a temporary RFID tag attached before they can be checked out.
B. Allow Others to Use My Account

If the patron has given permission for someone else to use the account, that information will be found above the patron’s address. Information can also be found there about what the person has permission to do.

C. Special Checkout Circumstances

1. Specifying a Different Due Date

Due dates may be extended in the case of book clubs, outreach, and if a patron notifies staff that they will be on vacation when the item is due. To change the due date, follow these instructions:

1. On the Check Out screen, choose **Specific Due Date** from the **Date Options** dropdown menu.
2. ! Using **Specific Due Date Until Logout** will change the due date for all patrons served until the work station is logged out or restarted. !!
3. Type in the due date or select it by using the calendar widget at the top of the checkout list.
4. Place all items that need the **Specific Due Date** on the RFID pad.
5. When all items are checked out, ask if the patron wants a receipt. Use the **Done** function to either not print or to print a receipt.
Scenic Regional Library Circulation Procedures

Book club items should have their due date set to the day the book club meets to discuss that particular book.

If a patron notifies staff that they will be on vacation, staff may set the due date of their items to the day after they come back, but no longer than 4 weeks.

2. Book Club Items

Scenic Regional Library has numerous book club kits for patrons and staff to use. These kits contain between 10 and 15 copies of titles, and have specific circulation procedures.

**When a Book Club Kit Arrives for a Patron** the kit has already been checked out to the patron at HQ. The books inside the bag should be checked out either to the book club leader or to the individual members of the book club. The Specific Due Date should be set to the day the book club meets. Inside the bag is a paper list of each book’s barcode. The book club leader may choose to record the name of each book club member next to the barcode of the book she takes home to read. **Please note:** each individual book MUST be checked out to either the leader or the individual before they leave the library.

**When Book Club Items are Returned** each book needs to be checked in and returned to the kit bag. Return the bag to HQ after the book club meets even if all the books have not been returned.

D. Editing a Due Date

Due dates may be edited after items have been checked out.

1. Open the patron’s **Items Out** screen.
2. Select the item(s) whose due dates need to be edited.
3. Select **Edit Due Date** from the **Action** dropdown menu.
4. Enter the new due date.
5. Click **OK**.
6. The new due date will be reflected in the **Items Out** screen.
E. Inter-Library Loan (ILL) Items

Inter-Library Loan (ILL) items are items that do not belong to a Missouri Evergreen library. These items are borrowed by Scenic Regional Library on behalf of its patrons.

Each ILL item will arrive at the branch with a strap indicating the patron’s name and barcode number. Attached at the top of the strap is an SRL barcode. Program a temporary RFID tag for the item. If the item has an RFID tag from the owning library, do not program a temporary tag. Instead, slip a paper inside the item directing the patron to check out at the Service Desk and use the SRL barcode to check the item in and out.

F. Checking Out Unprocessed Items

Unprocessed Items (UPIs) are items that are not cataloged but may still be checked out. Scenic Regional Library’s UPIs are back issues of magazines and fishing rods.

From the Check Out screen, click the dropdown box beside the barcode field to select the correct type of UPI.
After selecting the correct UPI type, click the **Submit** button. A window will appear asking for the number of non-cataloged items. Type the number of UPIs in the box provided and click OK.

Before checking out cataloged items to the patron, you must select **Barcode** from the dropdown menu to reset the program to accept cataloged items.

**G. Barcoded Item Not Found in the Catalog (Pre-Cataloging)**

Occasionally, when an item with a barcode is placed on the RFID pad, an alert will appear because the item was mis-scanned or it is not in the catalog.

In order to verify that the item was not mis-scanned, click the **Cancel** button and scan the item a second time. If this alert pops up a second time, complete the Title, Author, and Circulation Modifier fields. The Circulation Modifier tell Evergreen how the item should circulate. Click **Precat Checkout**.
Scenic Regional Library Circulation Procedures

When the pre-cataloged item is returned and checked in, an alert will display instructing staff to route the item to Cataloging at Headquarters.

If the pre-cataloged item is not returned, the patron is assessed a default LOST charge of $10.00.

H. Non-Traditional Materials

Scenic Regional Library offers non-traditional items for checkout. Mobile device chargers (plugs and cables), laptops, fishing rods, telescopes, binoculars, microscopes and slides, hotspots, Chromebooks, ukuleles, and cake pans are available at all branches with these borrowing guidelines.

1. Mobile Device Plugs and Cables

Patrons may check out plugs and/or cables to charge their mobile devices. Plugs and cables may not leave the building. These items must be checked out on a current, active library account. Check out period is one day. The plugs and cables are not holdable and cannot be renewed.

2. Laptop Computers

Patrons age twelve and older may check out a laptop computer and power cord to use inside the building. The check out period is one day. Laptops are not holdable but patrons may call ahead to reserve a laptop if they need it at a specific time. Patron use of a laptop will not be allowed to interfere with times that staff need to use it. Patrons must surrender the laptop when requested to by a staff member.

3. Fishing Rods

All SRL branches offer fishing rods for checkout. These items are provided by the Missouri Department of Conservation to give patrons the opportunity to experience recreational fishing without purchasing equipment.

Fishing rods may be checked out for 7 days, and are not renewable. **Damage charges are not assessed for any broken equipment and patrons aren’t charged for poles that aren’t returned.** If any equipment is returned broken, send it to the Assistant Director. MDC maintains the fishing rods and need to be notified when the poles need special attention.

There is no limit to the number of rods patrons may check out. To check out a fishing rod to a patron, follow these instructions:
1. Inform the patron of the special checkout period and due date.
2. Inform the patron that the fishing rod must be returned inside the same branch from which it was checked out. Fishing rods should never be placed in a bookdrop or left outside of the building.
3. Fishing rods check out as Unprocessed Items. They don’t have barcode numbers. See Checking Our Unprocessed Items.

When a patron returns a fishing rod verify that the pole is not visibly broken.

4. Telescopes and Binoculars

All SRL branches offer Orion Starblaster telescopes and Vortex Crossfire binoculars for checkout. These items are holdable. Telescopes can only be checked out from their owning branch and must be returned inside the same branch. Telescopes cannot be sent to other branches. Neither telescopes nor binoculars may be sent to other Evergreen libraries. They may only be checked out to an adult (18+) on their own library card and their card must be in good standing. The patron must present a photo ID when checking out a telescope or binoculars. If the patron has given permission for someone else to pick up the hold, that person must present

Telescopes and binoculars may be checked out for 14 days, and are not renewable. If not returned by their due date, they are subject to a $5.00 per day overdue fine. Damage charges will be assessed based on the cost of repair. This cost is determined by the St. Louis Astronomical Society. One telescope or set of binoculars may be checked out per household.

Verify that all pieces are present before every checkout:

<table>
<thead>
<tr>
<th>TELESCOPE</th>
<th>BINOCULARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orion reflector telescope with base ($325)</td>
<td>Vortex Crossfire 8x42 Binoculars ($140)</td>
</tr>
<tr>
<td>Camera bag ($10)</td>
<td>Case ($24.00)</td>
</tr>
<tr>
<td>Headlamp ($17)</td>
<td>Backyard Birds Pocket Guide ($10)</td>
</tr>
<tr>
<td>Laminated Instruction Manual ($10)</td>
<td>Laminated instruction manual ($15)</td>
</tr>
<tr>
<td>Quick Start Guide ($5)</td>
<td></td>
</tr>
</tbody>
</table>
To check out a telescope or binoculars to a patron, follow these instructions:

1. Ensure that the card presented for checkout is an adult card in good standing and that it belongs to the patron with the item on hold.
2. View the patron’s photo ID.
3. Verify the cardholder’s contact information so that we will be able to contact them if items are not returned.
4. Inform the patron of the due date, replacement costs, overdue fines, and damage fees that may be assessed.
5. Inform the patron that the telescope/binoculars must be returned inside the same branch from which they were checked out. They should never be placed in a bookdrop or left outside of the building.
6. Verify that all equipment is present (see above), showing it to the patron as you check each piece, and inform the patron that all pieces must be returned. Any missing or damaged components will be billed to the patron.
7. Demonstrate to patrons how to lift and handle the telescope, making special note of how to carry and move it. The telescope should only be picked up by the black base and handle. Ask the patron to secure the telescope with a seat belt while transporting it in a vehicle. The telescope weighs 14 lbs.
8. Scan or type the barcode number in the barcode field on the Checkout screen. The barcode number can be found on a card attached to the telescope.

When a patron returns a telescope or binoculars, ask them to remain at the Service Desk while staff verify that all pieces are present and not broken. Scan or type the barcode number in the barcode field on the Checkin screen. The barcode number can be found on a card attached to the telescope.

5. Microscopes

Patrons age eighteen and older may check out a microscope. Microscopes check out for 14 days week and are not renewable. One microscope may be checked out per household. There is a $5 fine each day that the microscope is overdue. Twenty-five prepared slides are included with the microscope. Microscopes are holdable and may travel between SRL branches. The patron must present a photo ID when checking out a microscope and staff must verify that the phone number on their account is accurate.

Follow the check out and check in procedures listed above for telescopes and binoculars.
Scenic Regional Library Circulation Procedures

<table>
<thead>
<tr>
<th>Items included with the microscope and charges for loss:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Microscope - $253.99</td>
</tr>
<tr>
<td>2. Case - $65</td>
</tr>
<tr>
<td>3. Specimen Slide Set - $16.89</td>
</tr>
<tr>
<td>4. Individual Slides - $5</td>
</tr>
<tr>
<td>5. Paper Manual - $0</td>
</tr>
</tbody>
</table>

Charges for damage will depend on the cost of repair.

Scenic Regional Library also owns four boxes of **one-hundred prepared slides** that may be checked out. The check out rules for these slides are the same as for the microscopes. There is a $5 charge for each lost or damaged slide and $60 charge if the entire box is lost. The four boxes do not contain identical slides and are listed in the catalog as Amscope 100 prepared biology microscope slides: Set A, B, C, and D.

6. Hotspots and Wifi Enabled Chromebooks

Scenic Regional Library has T-Mobile hotspots and Chromebooks for SRL patrons to check out for three months. They cannot be renewed. One device may be checked out per household. They may be checked out by patrons who are twelve-years-old and older. There is no overdue fine for wifi devices but the device will be turned off after it is overdue four days. Patrons will be charged $20 cleaning fee for devices returned dirty. Households who have had two instances of suspension will not be allowed to check out another device. There is a letter to send to these households in the Circulation > Forms folder of the staff Intranet. Devices are holdable and may travel between SRL branches and Washington Public Library. A survey is included with each hotspot to learn how the patron is using the device and how they rate its performance.

To check out a hotspot or Chromebook, follow these instructions:

1. Ensure that the card presented belongs to a patron age twelve years or older.
2. Verify the patron’s contact information.
3. Inform the patron of the special checkout period, due date, replacement costs, damage and cleaning fees that may be assessed, that **the device will be turned off if overdue, and that devices cannot be borrowed after two instances of suspension.**
4. **Advise patrons to not leave the devices in a hot car.**
5. Verify that all equipment is present, showing it to the patron as you check each piece.
6. Ensure that there is a survey in the hotspot case.
7. Scan or type the barcode number in the barcode field on the Checkout screen.
When a patron returns a hotspot or Chromebook, ask them to remain at the Service Desk while staff verify that all pieces are present and not broken. Scan or type the barcode number in the barcode field on the Checkin screen. If the survey was completed, send it to the Administrative Assistant at HQ and replace it with a blank one.

<table>
<thead>
<tr>
<th>Pieces and charges for loss:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Hotspot - $84</td>
</tr>
<tr>
<td>2. Case - $8</td>
</tr>
<tr>
<td>3. Charger - $25</td>
</tr>
<tr>
<td>4. Start Guide- $0</td>
</tr>
<tr>
<td>1. Chromebook - $348</td>
</tr>
<tr>
<td>2. Case - $25</td>
</tr>
<tr>
<td>3. Charger - $20</td>
</tr>
<tr>
<td>4. Cleaning fee (if dirty) - $20</td>
</tr>
</tbody>
</table>

Charges for damage will depend on the cost of repair.

7. Cake Pans

All branches have a selection of cake pans available for check out and have a catalog of all cake pans owned by SRL for patrons to view and place holds on. They are holdable both by SRL patrons and Missouri Evergreen patrons.

Cake pans check out for two weeks and may be renewed one time.

There is a $5 charge for pans returned dirty. Dirty is defined as needing staff to clean it before it can be circulated to the next patron.

To check out a cake pan:

1. Scan the patron’s library card or perform a patron search to open the patron’s Check Out screen.
2. Remove the Pan from its plastic bag. The bag will remain at the branch. If the pan is leaving your building to fill a hold elsewhere, leave it in the plastic bag and put it on top of the delivery bag going to HQ.
3. Explain the loan period and the charge for pans returned dirty to the patron.
4. Manually enter the barcode number that is on the pan or scan the barcode in the staff cake pan catalog into the patron’s Check Out screen.
8. **Memory and STEAM Kits**

All branches have a selection of Memory Kits and STEAM Kits for checkout. The Memory Kits were purchased by the Friends of the Library. They are holdable by and may be checked out only to SRL patrons. The STEAM Kits were purchased with grants and are holdable by Scenic Regional Library patrons and Washington Public Library patrons. The Kits check out for two weeks and may be renewed once.

Memory and STEAM kits do not have RFID tags attached. Their barcode numbers on an attached luggage tag may be scanned or manually entered by staff at the service desk during checkout and checkin. Do not put kits on the Hold Shelf. Keep them in the staff work area while waiting for patrons to pick them up.

To check out a Memory or STEAM Kit:

1. Scan the patron’s library card or perform a patron search to open the patron’s **Check Out** screen.
2. Show the patron the list of items included in the kit.
3. While the patron watches, check to make sure each item is in the kit.
4. You do NOT need to count pieces. If the kit contains a one-hundred-piece puzzle, you do not need to count the pieces. However, do open boxes to make sure the contents match reasonable expectations.
5. Enter the kit barcode found on the luggage tag into the patron’s **Check Out** screen.

9. **Ukuleles**

Ukuleles are holdable by and may be checked out only to Scenic Regional Library patrons. They check out for two weeks and may be renewed once.

Ukuleles do not have RFID tags attached. The barcode numbers on an attached luggage tag may be scanned or manually entered by staff at the service desk. Do not put ukuleles on the Hold Shelf. Keep them in the staff work area while waiting for patrons to pick them up.

When checking out a ukulele to a patron, open the case to make sure that there is an unbroken ukulele and tuner with charging cord inside.
V. Renewals

Some materials may be renewed twice, some once, and some not at all. An item may only be renewed if there are no hold requests for it and if the renewal limit hasn’t been reached. Renewal limits should not be overridden and no item should be renewed if there is a hold on it. Staff may renew items one of two ways: through a patron’s account or through the Renew screen.

A. Renewing Through a Patron Account

To renew items through a patron’s account, follow these instructions.

1. From a patron’s account, click on the Items Out button. This will display all items currently checked out.
2. Determine which items need to be renewed and select those items.
3. Open the Actions menu and select Renew. If the item or items are eligible for renewal, the due date will update.
4. If a patron requests that all items be renewed, click on the Actions menu and select Renew All. The due date will update for all items eligible for renewal.

B. The Renew Screen

This method is ideal when patrons bring books with them when they come to the library. To renew items through the Renew screen, follow these instructions:

1. Access the Renew screen by opening the Circulation menu at the top of the Evergreen home page and selecting Renew Items. This will display the Renew screen.
2. Put the items to be renewed on the RFID pad.
3. If the item or items are eligible for renewal, the due date(s) will update.
If an item cannot be renewed, a dialog box will popup explaining the reason. If an item has reached the renewal limit or is needed to fill a hold, do not force the action.
V. Checkin Procedures

When an item is returned, check it in, inspect it for damage, and make sure all pieces were returned. Checking in an item will remove the item from a patron’s account, make it available to fill holds, and may initiate routing of the item to another branch or library.

A. Standard Checkin

To check in items, follow these instructions.

1. Open the Check In screen either from the Home page or from a saved bookmark.
2. Place up to four items on the RFID pad.
3. Watch the screen to make sure the data is captured.
4. If the item needs to be sent to another branch or library or is filling a hold at your branch, a receipt will automatically print as long as the Autoprint Check In Modifier is set.
5. Tuck the transit slip inside the middle of items leaving your branch with the destination library’s name visible.
6. Wrap the hold slip around the spine of items staying on your hold shelf and attach it with a rubber band.

B. Checking In an Item with Damage

1.) If a Scenic Regional Library item is returned damaged, check it in and charge the patron accordingly. To determine how much and whether or not a patron should be charged for damage, refer to Appendix B: Assessing Damage and Charges.

1. Open the Check In screen either from the Home page or from a saved bookmark.
2. Place the item on the RFID pad.
3. Once the item shows up in the check in list, select it from the list of items checked in, and either right click on the applicable item or open the Actions drop down menu.
4. Select Mark Item Damaged.
5. A dialog box will pop up showing the automatic Total Damage fee. Do not change the pre-populated amount. Full replacement cost is charged for items that can no longer circulate.

6. Choose Total Damage from the **Type** dropdown menu.

7. Add a description of the damage and your branch and personal initials to the **Notes** field.

8. **NOTE:** Do not click Charge Fees or No Charge. Scenic doesn’t use those features.

9. Click **Submit**.

10. Complete the SRL **Damaged Item Form**.

11. Add a detailed Alert to the patron’s account, including the item barcode number, title, a description of the damage, which branch has the item, and the date three months in the future when the item will be discarded.

12. Send a **Damaged Item Letter** (found in the Circulation folder on the staff intranet) to the patron.

13. Wrap the Damaged Item Form around the item and put it on the branch’s Damaged Item shelf.

14. Hold the item for three months so that the patron may view the damage and take the book home after it is paid for. If the patron doesn’t pick it up in three months, delete it from the catalog and add a note to the patron’s account telling when it was discarded.

15. **Items should not be Marked Damaged from the patron’s list of Items Out.**

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2.) **If an item not belonging to Scenic Regional Library is damaged**, check it in and contact the owning library to explain the damage, discuss billing, and find out if the owning library wants the item to be returned or we may keep it to show the patron. We can neither change the status to Damaged nor delete materials belonging to other libraries. The owning library must do that. Contact information for MO Evergreen library can be found on the website. [moevergreenlibraries.org](http://moevergreenlibraries.org)
Scenic Regional Library Circulation Procedures

Complete the **Our Patron Damaged an Item Belonging to a Different Library** form and wrap it around the item. Keep it on the Damaged Item shelf if the owning library allows us to keep it.

Since all MO Evergreen libraries do not share the same billing policies, it is important that the owning library determine the charge. Add a message in the patron’s record including the title and barcode number, the nature of the damage, and the name of the owning library so that when the lending library notifies SRL of the fine for the damage, there will be a record of the problem.

Ideally, the owning library will mark the item Damaged, generating a circulation bill for the item. However, it is possible for SRL staff to add the charge for the damaged item as a grocery bill in the patron’s account. See **Bills**.

3.) **If an SRL item arrives back home with damage not addressed by the borrowing MO Evergreen library**, mark the item Damaged and notify the patron’s home library that its patron has been charged for a damaged item. The ME library may request photos or other verification of damage and may request that we return the item to them so that the patron can see it and keep it after it has been paid for. It is the ME library’s responsibility to contact the patron and explain the bill on his account. Complete the **Patron from Another Library Damaged SRL Item** form and send it to the Business Office. You may delete the item from the catalog after coordinating with the ME library and sending the Patron from Another Library Damaged SRL Item form to the Business Office. **EXCEPTION:** Do not complete this form when a Washington Public Library patron damages an SRL item. We do not bill WPL and they do not bill us.

4.) **If an I.L.L. item is damaged**, contact Interlibrary Loan staff at headquarters for instructions how to proceed.

C. **Checking in a DVD, Audiobook, Music CD, or Book with Disk that has Pieces Missing**

If a Scenic Regional Library item is returned with pieces missing

1. Check the item in.
2. From the Action button or by right clicking on the line item, select Mark Missing Pieces. This has to be done in the Checkin screen.
3. A dialog box will pop up asking you to verify this action. Click OK/Continue.
Scenic Regional Library Circulation Procedures

4. An Apply Standing Penalty/Message box will appear. Select Alert as the type of message you want to add to the patron’s account and create a message describing the situation.

5. Add your branch and initials and click OK.

6. The item has now been checked out to the last patron to have it and the status is DAMAGED. You can find who the last patron is by selecting Retrieve Last Patron Who Circulated Item from Actions.

7. You will see the missing pieces alert on the patron’s home page. The item is checked out to the patron with the usual two week due date and number of renewals.
8. Hold the item at the branch for 3 months, or until the patron returns the missing piece(s).

9. Notify the patron about the missing piece(s), and that the item will remain checked out to the patron until the missing piece is returned or paid for.

10. Fill out the **Missing Pieces Form** and keep it with the item.

11. If the patron does not return the missing piece(s) and the item becomes six weeks overdue generating a bill for the entire item, void the bill and enter a bill only for the piece that is missing. We charge $10 for each missing disc for multiple disc items up to the total cost of the item.

When a patron wishes to pay for the missing piece(s), enter a grocery bill in the patron’s account for the missing piece (if the bill doesn’t already exist) and accept payment for that amount.

If the missing piece is not returned within 3 months of when the Missing Pieces Form was filled out, check the item out to the HQ Mending account and route it to HQ so that the missing piece can be replaced. Enter a bill in the patron’s account for the missing piece and void the bill for the total amount that was generated when the item became six weeks overdue.

**If an item not belonging to Scenic Regional Library has missing pieces**, check the item out to the patron who returned it. We are not able to Mark Missing Pieces for items not belonging to SRL. Contact the owning library to ask how long we should keep the item before sending it back and how much to charge if the piece is not returned. Contact the patron and complete the Missing Pieces form.

Since all MO Evergreen libraries do not share the same billing policies, it is important to contact the owning library so they may determine the charge. Add a message in the patron’s record including the title and barcode number, a description of the missing piece, and the name of the owning library so that when the owning library notifies SRL of the fine for the missing piece, there will be a record of the problem.
D. Checking in Non-Traditional Materials

When checking in non-traditional items, ask the patron to remain at the desk and verify that all pieces are present and not broken. There is a list of telescope, binoculars, microscope, hotspot, and Chromebook parts in *IV. Check Out Procedures*.

If a telescope, binoculars, or microscope are returned late, do not charge for the day that it is returned. Making this correction will require voiding one $5 charge.

<table>
<thead>
<tr>
<th>If any piece is damaged:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tell the patron that you will inform him of the amount that he will be charged after conferring with the administration.</td>
</tr>
<tr>
<td>2. Check the item out to the branch account.</td>
</tr>
<tr>
<td>3. If a telescope is damaged, contact the Assistant Director.</td>
</tr>
<tr>
<td>4. When you learn how much the patron should be charged, add a grocery bill in that amount to the patron’s account with the Billing Type of Partial Damage.</td>
</tr>
<tr>
<td>5. Inform the patron of the bill.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>If any piece is missing:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tell the patron the price of the missing piece.</td>
</tr>
<tr>
<td>2. Add a grocery bill in that amount to the patron’s account using the Billing Type of Missing Pieces.</td>
</tr>
<tr>
<td>3. Check the item out to the branch account.</td>
</tr>
<tr>
<td>4. The bill will not be removed from the account unless the missing piece is returned within seven (7) days.</td>
</tr>
</tbody>
</table>

E. Checking In Deleted Items

After items have been in Lost status for four years, they are deleted from the catalog. Lost items that are no longer in the catalog still appear as bills in patron accounts. When patrons return these items, the items scan at check in as “misscanned or not cataloged” because the item has been deleted from the catalog. These items are still in the patron’s Other/Special Circulations field of their list of Items Out.

If you know who returned the item, you are able to remove it from the patron’s account by voiding the bill. Once the bill is voided, the item no longer appears in Other/Special Circulations. See part XI Bills, section C for instructions about voiding bills.
If the item is in bad condition when returned, the patron needs to pay for it. Do not void the bill.

If the item is in good condition, send it to the Collections Development Librarian for a decision about adding it back into the collection.

You will not know who returned the deleted item if it is left in the book drop. The bill will not be voided.

F. Checking In Interlibrary Loans (I.L.L.)

When Interlibrary Loan materials are returned, check them in using the RFID temporary tag or the SRL barcode if no temp tag was affixed. A transit slip will be printed, sending the materials to HQ.

If the I.L.L. item is damaged, contact Interlibrary Loan staff at headquarters for instructions how to proceed.

G. Claims Returned and Claims Never Checked Out

If a patron claims to have returned an item that cannot be found on the shelf, there is the option in the Items Out screen to mark the item Claims Returned. Don’t do it! Marking it Claims Returned will put the item in Other/Special Circulations where it will stay forever. The same is true for Claims Never Checked Out. If you decide to Forgive a fine, follow the instructions Bills – Forgiving a Bill.
VI. Routing of Materials

An internal courier services transfers items between SRL branches, the Washington Public Library, and the Gerald Volunteer Free Library. A courier service supported by the Missouri State Library transfers items between SRL and other libraries.

Each Missouri Evergreen library has its own library and branch code. Scenic Regional Library branch code designations are as follows:

<table>
<thead>
<tr>
<th>Code</th>
<th>Branch</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRL-HQ</td>
<td>Administration</td>
</tr>
<tr>
<td>SRL-HR</td>
<td>Hermann</td>
</tr>
<tr>
<td>SRL-NH</td>
<td>New Haven</td>
</tr>
<tr>
<td>SRL-OW</td>
<td>Owensville</td>
</tr>
<tr>
<td>SRL-PC</td>
<td>Pacific</td>
</tr>
<tr>
<td>SRL-SC</td>
<td>St. Clair</td>
</tr>
<tr>
<td>SRL-SN</td>
<td>Sullivan</td>
</tr>
<tr>
<td>SRL-UN</td>
<td>Union</td>
</tr>
<tr>
<td>SRL-WC</td>
<td>Wright City</td>
</tr>
<tr>
<td>SRL-WR</td>
<td>Warrenton</td>
</tr>
</tbody>
</table>

WPL  Washington Public Library
GE   Gerald Volunteer Library

A transit slip should be printed for every Missouri Evergreen cataloged item leaving your branch.

Items that need to be returned to libraries that aren’t Missouri Evergreen libraries should be sent to Headquarters with a note of explanation.

The internal courier makes deliveries to SRL branches and the Washington Public Library on this schedule:

<table>
<thead>
<tr>
<th>Day</th>
<th>Branches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>All Branches, WPL</td>
</tr>
<tr>
<td>Tuesday</td>
<td>UN, WPL</td>
</tr>
<tr>
<td>Wednesday</td>
<td>All Branches, WPL</td>
</tr>
<tr>
<td>Thursday</td>
<td>UN, WPL, WR</td>
</tr>
<tr>
<td>Friday</td>
<td>All Branches, WPL</td>
</tr>
</tbody>
</table>

The courier service supported by the Missouri State Library delivers and picks up Missouri Evergreen items at HQ five days a week.
VII. Editing Item Attributes

An item’s attributes (shelving location, circulating branch, etc.) may be edited from the Actions menu in the Item Status List View or Item Status Detail View.

A. Changing Shelving Location

The shelving location of items needs to be changed when they are removed from NEW displays, put on display, or removed from a display. To change an item’s shelving location, follow the instructions below.

1. In the Item Status screen, place the item on the RFID pad to enter its barcode into the Barcode box.
2. Select Edit -> Items from the Actions menu.
3. In the Holdings Editor screen, find Shelving Location.
4. From the dropdown box, select the proper shelving location.
5. Click Save and Exit. The window will automatically close after updating the item attribute.

Note: The attribute of more than one item may be changed at the same time if the same attribute is being changed. For example, when removing more than one Large Print book from the New Large Print shelving location, enter all barcodes into Item Status and select all items in the list to make a batch change.
B. Borrowing Items from Another Branch for Displays

Creating displays that change frequently is a good way to highlight items in a branch’s collection and change the appearance of a branch. Displays may consist of materials that share a common subject, theme, or loose association. Branches may borrow materials from other Scenic Regional Library branches to place on display. New material should not be borrowed from other branches. When borrowing items from other branches, the circulating library will need to be changed so that the items return to the branch where the items are being displayed.

Place a hold on the desired item before changing the circulating library. When the item arrives at your branch, change the circulating library.

Follow the instructions below to change the item’s circulating library:

1. Open **Item Status**.
2. Use the RFID pad to capture the barcode number in the Barcode box.
3. Select **Edit -> Item** from the Actions menu.
4. In the Holdings Editor screen, find **Circulation Library**.
5. From the dropdown box, select the branch where the item will be displayed.
6. Add a message in **Item Alerts** that alerts staff to send the item back to the owning branch when the display is dismantled. Include your branch initials and your personal initials. For example, “return to HR after January 31, 2018 – UN-AM.”
7. Click **Save and Exit**.
Repeat these steps for other items you wish to request for a branch display. When it is time to take down the branch display, repeat these steps to change the circulation library back to match the owning branch and remove the Item Alert. **Note:** The attribute may be changed for more than one item at a time when the same change is being made. For example, if five items are being added to a display all five barcodes may be accessed in the Holdings Editor.

### C. Missing and Mending

If a thorough search by more than one staff member has been made for an item and the item cannot be found, its status needs to be changed to Missing. This prevents from being placed on a item that can’t be found and alerts the RIFD system to flag the item when scanning shelves with the wand. Items may be marked as Missing by entering the barcode in Item Status and choosing Mark Item as Missing from the Actions dropdown menu.
If an item needs to be repaired or needs a replacement piece ordered, check it out to the HQ Mending account – 9301395754. Complete an HQ Routing Slip and send the item and slip to Collection Development.

**HQ does NOT repair books.** If you can add a few circulations to the life of a book by using a little glue or tape in the branch, add the glue or tape. But do not send the book to HQ. Disks that need to be buffed and AV cases that need to be replaced should be sent to HQ for attention.

**HQ ROUTING SLIP**

- **HQ Staff Name**
- **Sending Branch**
- **Branch Staff Name**
- **Item barcode**
- **Reason item is being sent to HQ**

Date
VIII. Searching the Catalog

Basic Search
A Basic (Keyword) Search of the catalog can be performed from the Evergreen home page. Enter the partial or complete title, author name, and/or subject to retrieve a wide range of results from which to refine your search.

Advanced Search
To perform an advanced search of the catalog, use the Search dropdown menu on the Evergreen home page to access Search the Catalog.

The Staff Catalog page gives you numerous ways to limit your search.

- **Keyword Search** – This is the default Staff Catalog page. You can use the dropdown menu to choose to search by Keyword, Title, Journal Title, Author, Subject, Series, and Digital Bookplate. You may also select format and qualifiers for your search terms.
• **Use the +** if you want to add another row of search limiters.

• **Use the three vertical dots** if you want to add search options including video type, large print, and publication year. The picture above shows both an extra row of limiters and the additional search factors.

• **A broader search is always the best way to begin to look for an item.** If you add too many limiters, you may not find what you are looking for because the way an item is cataloged will determine how it will react to a search. If you limit your search to “purple poisonous plants that bloom in May in the Pacific Northwest,” you may get zero results. “Poisonous plants” is a better place to start.

• **Search Library** – Search library should always default to Missouri Evergreen. You may limit your search to a specific library or branch in special circumstances. If you start with a limited search, there is the danger of telling a patron that we don’t have access to an item when we really do; it’s just not at the location you were searching.

• **Numeric Search** – This search will allow you to search for items by ISBN (International Standard Book Number), call number, and barcode number.

**Search Results – An Example**

A Keyword search of all of Missouri Evergreen for All Formats containing the words LINCOLN LAWYER, yields 130 results with ten results per page.
Facets of the search results appear in a bar on the left side of the results page. Clicking on one of the facets will limit the search results further.

<table>
<thead>
<tr>
<th>Topic Subject</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presidents</td>
<td>42</td>
</tr>
<tr>
<td>History</td>
<td>21</td>
</tr>
<tr>
<td>Trials (Murder)</td>
<td>18</td>
</tr>
<tr>
<td>Lawyers</td>
<td>16</td>
</tr>
<tr>
<td>Investigation</td>
<td>14</td>
</tr>
</tbody>
</table>

One of the facets found in the search for LINCOLN LAWYER is Topic Subject. Forty-two of the 130 results have “Presidents” in the cataloging as a topic subject. Other items in the 130 results may also be about President Lincoln but if “Presidents” isn’t in the catalog record, those items will not be part of the 42.

If the only LINCOLN LAWYER items that you are interested in are about President Lincoln, click on the link “Presidents” to remove items from the search results that don’t include “Presidents” in the cataloging. The number of items in Search Results is now 42.
Result #36 of 42 is chock-full of information.

Complete title
Author
Format
Physical Description
Edition
Publication Date

ISBN (International Standard Book Number) associated with the items on the record.

Number of items available / Total number of items on the record (ex. 18 / 20)
Libraries included in your search (ex. all of ME – Missouri Evergreen)
TCN (Title Control Number)

Hold on this record (ex. 0)
Created – when the record was created and by whom
Edited – the last time the record was edited and by whom

Place Hold – click here to place a hold
Scenic Regional Library Circulation Procedures

To find more information about this record, click on the title. The resulting screen is shown below.

The default view is **Item Table**. Another view that is helpful to circulation staff is **View Holds**.

---

<table>
<thead>
<tr>
<th># Location</th>
<th>Call Number / Item Notes</th>
<th>Part</th>
<th>Barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SRL-WR</td>
<td>326.8 BRA</td>
<td>3007116295</td>
</tr>
<tr>
<td>2</td>
<td>CONC-CNT</td>
<td>326.8 BRANDS</td>
<td>3007374676</td>
</tr>
</tbody>
</table>

---

Title: The zealot and the emancipator: John Brown, abolition and the struggle for American freedom

Author: Brands, H. W.

Bib Call #: 326/.80922
- **Item Table** shows which libraries own a copy and information specific to each copy (call number, barcode, shelving location, circulation modifier, age protection), activation date, whether or not the item is holdable, status, and due date (if checked out). Clicking on View under the item barcode will take you to further information about that item, including the item price and the most recent patron to have the item checked out.

- **View Holds** allows you to see who has holds on the record.

- **Patron View** takes you the OPAC (Online Public Access Catalog). Here, you see what patrons see. The page contains a summary of the book and Readers Advisory information. Below the summary is a list of subjects. Clicking on a subject will open a new page of search results with items that share the subject.
Opening Awards, Reviews, & Suggested Reads (below Subject) will equip you to find similar items for patrons.
IX. Patron Holds

Patrons may place holds on items through the Online Public Access Catalog, through the mobile app, or by asking staff to place the hold for them. Holds will be filled with items belonging to Scenic Regional Library or another Missouri Evergreen member library.

A. Types of Holds

The chart below describes the different types of holds that can be placed in Evergreen.

<table>
<thead>
<tr>
<th>Hold Type</th>
<th>Description</th>
<th>Instructions</th>
<th>Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title Hold (T)</td>
<td>Used when a patron wants the first available copy of a title in a specific format. Most holds for books and audiobooks are title holds.</td>
<td>Click on <strong>Place Hold</strong>.</td>
<td>Patrons or staff may place title holds</td>
</tr>
<tr>
<td>Item Hold (C)</td>
<td>Used only when a specific copy/barcode is needed. These holds are used when the cataloging of an item needs to be changed or when you have verified by phone that a specific copy is available to fill a hold.</td>
<td>In the catalog record, click <strong>Item Hold</strong> for the specific item.</td>
<td>Only staff may place item holds</td>
</tr>
<tr>
<td>Parts Hold (P)</td>
<td>Used when a patron wants a specific part of an item, typically a DVD set.</td>
<td>Click on <strong>Place Hold</strong>. On the confirmation screen, select the part wanted from the dropdown menu.</td>
<td>Patrons or staff may place these holds</td>
</tr>
<tr>
<td>MetaRecord Hold (M)</td>
<td>Used to pull the item from a pool of different formats and editions when the patron doesn’t require a specific format or edition.</td>
<td>With formats grouped, click <strong>Place Hold</strong>, and choose the format(s) the patron wants.</td>
<td>Patrons or staff may place these holds</td>
</tr>
</tbody>
</table>

B. Placing Holds from the Patron Record

**Title Holds**

To place a title hold for a patron from their record, choose the **Holds** action button at the top of the patron record. Then choose the Place Hold button.
The catalog advanced search screen will appear. By using the advanced search, staff can customize the search in multiple ways. (*See Section VIII, Searching the Catalog*)

After performing a search, click on the green **Place Hold** button to place a title hold on the item.

It is usually best to place the hold on the record that has the highest number of items attached to it. There are three records for the physical book, *Essex Serpent*. One record has one item attached to it. One record has two items attached to it. One record has seventeen items attached to it. You will see the number of items that are on a record in the search results page (highlighted in the example above). The number shows: items available/total number on record. In this example: 17/17.
Scenic Regional Library Circulation Procedures

After clicking **Place Hold**, a confirmation screen will appear. The patron’s barcode, default pick up location, and default hold notification preference will appear. Verify that all the information is correct and click the green Place Hold button.

More than one copy of an item may be reserved by changing the default number 1 shown in **Number of Copies**. This is useful when reserving copies for **book clubs**. This feature is not available to patrons on the OPAC. Note: Don’t reserve more copies than are attached to the record.

Patrons may want to **Suspend** the hold if they are don’t want the hold to be captured immediately. The hold is suspended by checking the box next to Suspend. An activation date may be selected if the patron knows when she wants it to become active. Not selecting a date will keep the item in the patron’s holds list but it won’t be captured until the hold is activated. See **Suspending and Activating Holds**

**Item Holds** (also known as **Copy Holds**)

If there is a specific copy of an item needed by staff, you can place an item hold from the full catalog record screen. This should only be done in rare circumstances: for example, if an item is needed because of a cataloging error or after you have called the owning library to verify the copy is available and not missing.

After performing a search, click on the title of the item in the catalog. This will bring up a detailed catalog screen. From here, click **Item Hold** in the Holdable? column.
After clicking **Item Hold**, the confirmation screen will appear. Verify the notification information with the patron. Click the **Place Hold** button.

**Part Holds**

If an item has multiple parts or discs, after clicking Place Hold on the search results page, select the part wanted by the patron from the Part dropdown menu.
If you attempt to place the hold without selecting a part, this error message will appear.

Only one part may be selected at a time. If a patron wants more than one specific part or disc, staff will need to click the browser BACK arrow and place a hold on another part.

MetaRecord Holds

When there are multiple records and/or formats for an item and the patron doesn’t have a format preference, you may place a MetaRecord hold. For example, if a patron wants a copy of *The Lincoln Lawyer* and will accept a book or audiobook, use a MetaRecord hold. This will place one hold for the patron and the first available item in any of the records with the selected formats will be reserved for the patron.

When performing a search, make sure the **Group Formats and Editions** check box is checked:
The search results will look like the picture below. Notice the formats.

Click **Place Hold**.

A confirmation screen will then appear with a list of item formats. The default is for all formats to be selected. Deselect the formats that the patron won’t accept. Click the green Place Hold button.

---

C. **Placing Holds from a Catalog Search**

Staff may place items on hold through the library’s catalog rather than through a patron account. To place a hold for a patron from the catalog, first perform a search for the desired item.

After clicking **Place Hold**, a confirmation screen will appear. On this screen, you will need to enter the patron’s barcode. If you don’t have access to the patron’s number, you may perform a **Patron Search** from the button next to the Barcode field.
Click **Search for Patron** and Select the correct patron from the search results.

The patron’s name, barcode number, and notification preferences will automatically populate the Place Hold screen. Verify the information with the patron and click **Place Hold** to complete the process.

**D. Baskets**

When placing holds on multiple items for a single patron, a **Basket** may be used to save time. As items the patron wants are found in the catalog, they may be added to a basket and holds placed on all items in the Basket at one time. *Items with parts (series DVDs) may not be added to a basket. These holds must be placed individually.*

i. Perform a catalog search from the patron’s account.

ii. From the search results, click the box next to the title to add the item to the Basket.
Scenic Regional Library Circulation Procedures

iii. As each item is added to the basket, the number in the basket increases. You will find the basket icon at the top right of the page.

![Basket icon with options](image)

iv. When all items that need holds placed are in the basket, select what you want to do with the basket from the Basket Actions dropdown menu.

![Basket Actions dropdown menu](image)

v. After you select, **Place Hold**, you will see all of the titles that are being reserved and the patron’s contact information.

vi. From this screen, you can perform all of the usual holds functions.

vii. **Items will remain in the basket until it is cleared** or until the staff member logs out. The basket is not specific to the original patron. It will carry over to every patron for whom you place a hold. After placing the holds from the basket, access Basket Actions again and select **Clear Basket**.
E. Book Club Collection Holds

Scenic Regional Library has a special collection of book club titles housed at HQ. This collection has 10 to 15 copies of the same title and is intended to be used as a kit by book clubs throughout the Missouri Evergreen community. A full list of books in the collection can be found on our website https://scenicregional.org/bookclubbooks/. Patrons and staff may choose titles for use by their book club from this list and contact Collections Development to make a reservation. For instructions on how to check out and check in book club books, see Checkout Procedures and Checkin Procedures.

F. Canceling Holds

Holds can be canceled through the patron record. Display a patron’s holds by clicking the Holds action button.

1. Select the hold the patron wishes to cancel
2. Select Cancel Hold from the Actions menu. This option appears at the bottom of the list.
3. When the pop-up window appears, choose a cancel reason from the dropdown menu. Add a note explaining why the hold was canceled. For example, if a patron requested the Large Print version of a book but received the regular print version, add a note in this window. Be sure to add your initials in the text box. This note can be accessed later if a question arises about why a hold was canceled.
4. Click Cancel Hold and the hold should disappear from the list on the patron’s record.
Scenic Regional Library Circulation Procedures

At any time, staff may view cancelled holds by clicking the Recently Canceled Holds button on the Holds screen. This may be helpful if a patron wants to re-request an expired or cancelled hold. If a hold needs to be restored, it can be un-canceled. To un-cancel a hold, follow the instructions below:

1. Click Recently Canceled Holds.
2. Highlight the hold you wish to un-cancel.
3. Select Uncancel Hold from the Actions menu.
4. The item should reappear in the active holds list with the original request date.

The note written by staff when canceling a hold can be viewed through the Recently Canceled Holds screen. To view the cancel cause and notes, follow the instructions below:

1. Click Recently Canceled Holds.
2. From the Column Picker, make sure that Cancel Cause and Cancelation Note are checked.
3. Cancel Cause shows the Cancel Reason that was selected when the hold was canceled.
4. Cancel Note shows the message written by staff to explain the cancelation.
G. Suspending and Activating Holds

If a patron does not want a hold to be filled immediately, staff may suspend the hold. Suspending a hold prevents the hold from being filled until a specific date or indefinitely. This can be done when placing the original hold (See Placing Holds from the Patron Record) or later from the patron’s record. To suspend a hold indefinitely from the patron’s record, follow the instructions below.

1. From the Holds screen of the patron’s record, select the hold that the patron wishes to suspend.
2. Select Suspend Hold from the Actions menu.
3. A pop-up window will appear verifying that you would like to suspend the hold. Click Yes.
4. The status of the selected hold will change to Suspended on the patron’s record.

To suspend a hold until a specific date, follow the instructions below.

1. From the Holds screen of the patron’s record, select the hold that the patron wishes to suspend.
2. Select Edit Hold Dates from the Actions menu.
3. A pop-up window will appear. Check the Holds Activation Date box. Select the date that you would like to activate the hold. This will be the date that the item will show up on pull lists again.
4. Click Submit.
5. The status of the selected hold will change to **Suspended** on the patron’s record.

The process to activate a suspended hold is very similar. When the patron asks you to activate a hold, follow the instructions below.

1. From the **Holds** screen of the patron’s record, select the suspended hold that you wish to activate.
2. Select **Activate** from the **Actions** menu.
3. A pop-up window will appear verifying that you would like to activate the hold. Click **OK/Continue**.
4. The status of the selected hold will change to **Waiting for Copy** on the patron’s record.

**Holds can be suspended at the same time as they are placed.** Look for this feature when you know the patron does not want to receive the item immediately.
H. Pulling and Capturing Holds

Every item that is requested for a patron appears on the circulating library’s Pull List for Hold Requests report. This report can be accessed in Evergreen, by selecting **Pull List for Hold Requests** in the **Circulation** dropdown menu.

The resulting list shows items to pull from your shelves to fill holds for patrons of both your library and other Missouri Evergreen libraries.

The default setting is to show 25 rows. There is the option of viewing up to 100 rows in the dropdown menu.

![Image of the Hold List](image)

The list will need to be printed so that staff may pull items from branch shelves to fill holds. To print the list, open the Column Picker and select **Print Full Grid**. Items on request should be pulled at least once a day.

**Capturing Holds**

After printing this list, holds will need to be retrieved from branch shelves and captured in Evergreen. To capture a hold, follow the instructions below:

1. Open the **Check In** screen.
2. Place the item on the RFID pad.
3. If the item has a hold at your branch, use a rubber band to attach the hold shelf slip to the item and put it on your hold shelves.
4. If the item has a hold at another branch or library, put the transit slip in the item and place the item in the appropriate delivery bag.
Once an item is added to the holds shelf, the patron needs to be notified. For patrons who choose to be notified by email or text message, the notification is automatically sent two hours after capturing the hold. For patrons who choose to be notified by telephone, staff need to call the phone number that appears on the hold slip. Note on the hold shelf slip the date the patron was notified.

I. Retargeting Holds

Holds not captured within 24 hours of being placed will automatically retarget a different item if there is another available item on the same record. When an item remains on the pull list for more than 24 hours, your copy is the only one showing as Available in the catalog. Change your copy’s status to Missing if you can’t find it.

After changing the item’s status, search the catalog for a copy of the item on a different record. Place a hold for the patron on the new record. If no other copy is available, contact the patron’s home library so that they may decide if an ILL should be requested.

J. Clearing Shelf Expired Holds from the Hold Shelf

When items have been on the holds shelf for ten days, they are considered expired. These items will need to be removed from the hold shelf and routed as directed by Evergreen.

To find shelf expired holds, select Holds Shelf from the Circulation menu on the Home screen. This will bring up the list of all holds currently on your branch’s shelf.
To view expired holds, check **Show Clearable Holds**.

The chart should display a column for User Display Name so that you are able to easily find the items that need to be moved from the hold shelf. If there is no column showing the patron’s last name, use the column picker to add the column.

Print the list and retrieve the expired holds from the holds shelf. If all items on the list are found click the **Clear these Holds** button. Expired holds may also be canceled individually by highlighting the hold(s) and choosing **Cancel Hold** from the **Actions** menu. All canceled holds must now be **Checked In** to trigger the next hold, a transit slip, or reshelving.

**If an item on the list that belongs to Scenic is not found**, call the patron to see if he picked it up and didn’t check it out. If the patron doesn’t have the item, cancel the hold and mark the item **Missing**. You may need to place the hold for the patron again if he still needs it.

**If an item on the list that belongs to a Missouri Evergreen library isn’t found**, call the patron to see if he picked it up and didn’t check it out. If the patron doesn’t have the item, contact the owning library to see if they have it. If they don’t, cancel the hold and ask the owning library to mark it Missing. You may need to place the hold for the patron again if he still needs the item.

If the status of an item on the Holds Shelf is **Wrong Shelf**, the patron has chosen a different pickup location. Check the item in to trigger a transit slip to the new pickup location.

If the status of an item on the Hold Shelf is **Canceled**, the patron canceled the hold himself. Remove the item from the Hold Shelf and check it in to find out how it should be routed next.
K. Hold Groups

By joining Hold Groups, patrons will have holds automatically placed on new books by popular authors. Patrons are able to remove themselves from a Group but cannot add themselves to a Group. Staff perform that function.

1. Perform a patron search. (Do not scan a library card into Checkout. The magic won’t work by entering data into Checkout.)
2. Select the target patron from the results.
3. Click the Add to Bucket button.
4. Select the author whose Hold Group the patron wants to be added to.
5. A confirmation will appear in a message at the bottom right of the screen.
6. In the patron account, you can check Other > Hold Groups to verify the patron is in the group or to remove the patron from a Hold Group.

Search for the patron. Select the patron from the results. Click Add To Bucket

Click the desired author.

---

**Patron Search Results**

<table>
<thead>
<tr>
<th>#</th>
<th>Card</th>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>930112811+</td>
<td>PATRON</td>
<td>JANE</td>
<td>A</td>
</tr>
</tbody>
</table>

---

**Patron Search Results**

- New Bucket
  - Hold Groups: Baldacci, David
  - Hold Groups: Box, C.J
  - Hold Groups: Brown, Sandra
  - Hold Groups: Cari, Robyn
  - Hold Groups: Child, Lee
  - Hold Groups: Coben, Harlan
  - Hold Groups: Connelly, Michael
  - Hold Groups: Evanovich, Janet
  - Hold Groups: Grisham, John
See the confirmation message.

Successfully added 1 users to bucket Coben, Harlan.

Verify patron added to Hold Group or remove from group.

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>Description</th>
<th>Remove Hold Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Carr, Robyn</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Child, Lee</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Coben, Harlan</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
X. Bills

Scenic Regional Library charges for lost items, damaged items, replacement cards, and out-of-district fees. Bills for lost and damaged items are called circulation bills. They are automatically generated by Evergreen. All other bills are called grocery bills. They are manually entered by staff.

Refunds are not issued. If patrons find lost materials after paying for them, patrons should keep the item(s) for their own use.

To access a patron’s bills, go to the patron record and click on the Bills action button.

Clicking on Bills takes you to the patron screen showing individual bills and where payment can be entered.

A. Paying Bills

If a patron owes money for an item that belongs to a library other than SRL, check the Full Details of the bill to learn if there is a processing fee included in the bill and void that processing fee before accepting payment from the patron. See Section d – Processing Fees.
Scenic Regional Library Circulation Procedures

Payments received at SRL stay at SRL. Checks should be made out to SRL. If the patron is paying for an item belonging to a Missouri Evergreen library, it is the responsibility of that library to send an invoice to our business office.

To pay bills on a patron’s account:

1. Select the line for the bill that is being paid.
2. Choose either Cash or Check from the payment type dropdown menu.
3. Enter the amount of the payment in the Payment Received box.
4. **Do not enter an amount in excess of the amount of the bill.**
5. Make sure that the Annotate Payment checkbox is checked.
6. Click Apply Payment to record the payment to the patron’s account.
7. After applying the payment, a box will pop up asking for an annotation. Staff must enter their initials in this box. Other important information may also be entered in this field. The branch and date will automatically be added to the payment.
8. Click OK.

**If the patron wants to pay for a specific item** in the list of bills, make sure that the specific bill is the only one checked. Uncheck all the other bills in the list, and then apply payment. Failure to check only one item in the list will cause the payment to be applied to the first item in the list, no matter what the amount of the bill is or what the amount of the payment is.

B. Paying with a Credit Card

Patrons may pay bills through their OPAC account with a credit card. They may do this using their home computer, mobile device, or a library computer. Patrons won’t be able to log onto public computers if their bills are $10 or over. Staff may sign these patrons on as guests so that they may access their online account and pay the bill. Credit card payment may not be made at the service desk.

C. Voiding a Bill

Sometimes, staff may need to void a bill on a patron’s account. For example, the wrong patron was charged for damage to liner notes or a lost item is found on the shelf. In order to do so, bring up the patron’s account, and go to the Bills screen. Highlight the bill in the patron’s list of bills and select Full Details from the Actions for Selected Transactions menu:
This will bring up the full details screen. On this screen, highlight the bill that needs to be voided in the Bills section, and click Void Billings in the Actions dropdown menu.

No record of the bill will remain on the patron’s account.

D. Processing Fees

Some MO Evergreen libraries charge a processing fee when an item is lost or damaged. Scenic Regional Library does not ask patrons to pay this fee; patrons pay only for the item. Follow the instructions for Voiding a Bill to void the processing fee:

1. Highlight the bill in the patron’s list of bills.
2. Select Full Details from the Actions menu.
3. On the full details screen, separate bills will appear in the center of the screen under the Bills heading. One will have a billing type of Processing Fee, and another will have a billing type of Lost or Damaged.
4. Highlight the Processing Fee bill.
5. Click Void Billings from the Actions dropdown menu.
6. After the processing fee has been voided, add an explanatory message to the patron’s account.

Example: $10 processing fee for lost item voided – The Velveteen Rabbit owned by PBPL – dd
E. Accepting Money Owed to Other Missouri Evergreen Libraries

If a patron who owes money to a different Missouri Evergreen library moves to our district, we do not accept payment of money owed to the other Missouri Evergreen library. All such payments must be made directly to the billing library.

F. Forgiving a Bill

Scenic Regional Library will forgive one instance of loss or damage if staff are convinced that the patron is not responsible for loss or damage. Do not Void the bill; Forgive it. Forgiving creates a record; Voiding does not.

1. Select Payment Type – Forgive.
2. Select the line item of the bill to be forgiven in the list of bills.
3. Enter the amount to be forgiven in Payment Received.
4. Make sure the Annotate box is checked.
5. Click Apply Payment.
6. Enter a full explanation of why the bill is being forgiven and your initials in the annotation box.

After a bill has been forgiven, a Note should be created in the patron’s account explaining the situation. The title of the note should be Forgiven. The text should include the item title, barcode, amount of bill being forgiven, and the reason the bill is being forgiven. Keep in mind that forgiving a bill for an item that belongs to a Missouri Evergreen library doesn’t prevent the owning library from sending a bill to Scenic which Scenic needs to pay even though we aren’t receiving reimbursement from the patron.
Staff will be able to easily see the record of forgiveness in the patron’s Notes and will know not to forgive other bills.

Claims returned or never checked out

Occasionally a patron may insist that he didn’t check out or that he returned an item that he was charged for. If there is no record of previously forgiving a similar fine and if staff think that forgiving the current fine is justified, the fine may be forgiven.

a. Write down the item barcode number.
b. Check the item in using the Actions drop down menu in the Items Out screen. This will remove the bill from the patron’s account.
c. Add a message to the patron’s account that includes the item title, barcode, and the information about the patron claiming to have returned/never checked out the item.
Scenic Regional Library Circulation Procedures

d. If the item belongs to SRL, enter the item barcode in Item Status and use the Actions drop down to mark it missing. If the item belongs to an ME library, contact that library to explain your action. We cannot mark their item Missing and checking it in set the item in transit. The owning library needs to know the item is NOT on its way back home. They may charge us for the lost item.

G. Grocery Bills & Donations

Grocery bills are bills that are not automatically generated by the ILS. These charges include replacement library cards, non-resident fees, partial damages, missing pieces, etc. Grocery bills must be manually billed and entered in a patron’s record. These are added from the Bills screen in the patron record.

To add a grocery bill to a patron’s record, follow the instructions below:

1. Click the Bill Patron button to create a grocery bill on the patron’s record.
2. In the Create Bill screen, select the appropriate type from the Billing Type dropdown box.
3. Enter the amount to bill the patron in the Amount box. See Patron Record Charges for appropriate charges.
4. Enter your initials, and a bill explanation if necessary, in the Note box.
5. Click the Submit this Bill button to bill the patron.
Donations

If a patron wants to include a donation in her payment for a lost or damaged item, do not include the donation in her payment for the item. **The payment entered should not be in excess of the bill amount.**

For example, if the patron gives you $20 to pay a $16 bill and tells you to keep the change, enter a payment of $16 then create a donation bill for $4 and pay that bill with the four dollars.

Enter payment in the amount of the bill-----
Create a bill for the donation----

![Bill Creation Screen]

**Patron Record Charges**

Some Grocery Bills need to be created on the patron’s account. Those billing types are:

- SRL Replacement Card-P
- Non-Resident Fee-P
- Missing Pieces -P
- Partial Damage-P
- Total Damage-P
- Interlibrary Loan Fee-P

The “P” following the billing name is the clue that these bills are created on a Patron account.

When selecting **Nonresident fee** or **Replacement library card**, the **Amount** field will automatically populate. All other billing types require staff to enter the amount of the bill.

When selecting **Partial Damage** as the billing type, enter the appropriate charge in the **Amount** field (see the chart below) and an explanation in the **Note** field. Partial damage charges are used for telescopes, binoculars, dirty cake pans and wifi devices, and AV damage. For example: cake pan 300XXXXXXX returned and needed to be cleaned – PC-AZ
The **Misc** billing type should not be used except on the rare occasion that the branch manager agrees that it is the only option. In this case, a detailed explanation needs to be entered in the **Note** field.

Scenic Regional Library charges the following amounts for items that must be manually entered in a specific patron’s record as grocery bills:

<table>
<thead>
<tr>
<th>Card-Related Charges</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-resident Fee</td>
<td>$50.00</td>
</tr>
<tr>
<td>Replacement Library Card</td>
<td>$1.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Missing Pieces Charges</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Missing disc</td>
<td>Full Price</td>
</tr>
<tr>
<td>(Audiobook only has 1 disc)</td>
<td></td>
</tr>
<tr>
<td>Missing DVD</td>
<td>Full price</td>
</tr>
<tr>
<td>(DVD only has one disc)</td>
<td></td>
</tr>
<tr>
<td>Multiple missing discs</td>
<td>$10 per disc, not exceeding cost of the item</td>
</tr>
<tr>
<td>(Audiobook)</td>
<td></td>
</tr>
<tr>
<td>Multiple missing discs</td>
<td>$10 per disc, not exceeding cost of the item</td>
</tr>
<tr>
<td>(DVD)</td>
<td></td>
</tr>
<tr>
<td>Missing disc(s)</td>
<td>$10 per disc, if book is returned</td>
</tr>
<tr>
<td>(book with disc)</td>
<td></td>
</tr>
<tr>
<td>Missing book</td>
<td>Full price</td>
</tr>
<tr>
<td>(book with disc)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Partial Damage Charges</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Broken DVD/CD case</td>
<td>$4.00</td>
</tr>
<tr>
<td>Lost DVD/CD case</td>
<td>$4.00</td>
</tr>
<tr>
<td>Lost/damaged AV insert or liner notes</td>
<td>$1.00</td>
</tr>
<tr>
<td>Lost disc in multidisc set</td>
<td>$10.00</td>
</tr>
<tr>
<td>Broken disc in multidisc set</td>
<td>$10.00</td>
</tr>
<tr>
<td>Lost disc attached to a book</td>
<td>$10.00</td>
</tr>
<tr>
<td>Broken disc attached to a book</td>
<td>$10.00</td>
</tr>
<tr>
<td>Dirty cake pan</td>
<td>$5.00</td>
</tr>
<tr>
<td>Dirty wifi device or case</td>
<td>$20.00</td>
</tr>
</tbody>
</table>
Walkin Accounts

All Scenic Regional Library branches use a Walkin account to bill and accept payment for incidental items. The Walk-In account is a patron account with the patron last name of Walkin and first name of the branch, for example, **Walkin, Pacific**. Bill the Walkin account for:

- Copies-W
- Fax-W
- Donation-W
- Café-W
- Passport Fees-W
- Flash Drive-W
- Book Bag-W
- Book Sale-W
- SRL Merchandise-W
- Friends Merchandise-W
- Gallery-W

The “W” following the billing name is the clue that the bill is created on the Walkin account.

To bill and accept payment for incidental items using the Walkin account, follow the instructions below:

1. Search for and open your branch’s Walkin account. For example: **Walkin, Pacific**.
2. From the Bills screen on the patron record, click on Bill Patron to add a grocery bill to the branch’s Walkin account.
3. In the Create Bill screen, select the appropriate bill type from the Billing Type dropdown menu. For the Walkin account, only select a Billing Type with a “W” after the name of the Billing Type.
4. Enter the amount to bill the patron in the **Amount** box. See **Walk-In Account Charges** for appropriate charges.
5. Enter your initials, and a bill explanation if necessary, in the **Note** box.
6. Click the Submit this Bill button to bill the branch’s Walkin account.
Scenic Regional Library Circulation Procedures

Accept the patron’s payment by paying bills on the branch Walk-in account:

1. Choose either Cash or Check from the payment type dropdown menu.
2. Enter the amount of the payment in the Payment Received box. The amount of payment should never exceed the amount of the bill.
3. Make sure that the Annotate Payment checkbox is checked.
4. Click Apply Payment to record the payment to the account.
5. After applying the payment, a screen will pop up asking for an annotation. Staff must enter their initials in this box. The branch and date will automatically be added to the payment.

If the patron insists that the library keep the change, add another grocery bill on the Walk-In account as a donation. Then pay the newly created bill with the change.

Walk-in Account Charges

Scenic Regional Library charges the following amounts for incidental items that must be manually entered in the branch Walk-in account as grocery bills:

<table>
<thead>
<tr>
<th>Copies, Prints, &amp; Faxes</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy/Computer Print</td>
<td>$0.15 (per page)</td>
</tr>
<tr>
<td>Fax</td>
<td>$1.00 (per page)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Items for Purchase</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Book Bag</td>
<td>$1.00</td>
</tr>
<tr>
<td>Flash Drive</td>
<td>$4.00</td>
</tr>
</tbody>
</table>

H. Friends of the Library Membership Dues

Membership dues for Friends of the Library are not entered in Missouri Evergreen. If a patron wishes to pay their Friends of the Library dues, accept the payment, place it in an envelope with the completed Friends application, and give it to the branch manager. It will be sent to HQ with the branch’s weekly cash bag.

Patrons may also pay Friends dues or purchase a donor wall “book” by visiting www.scenicregionalfoundation.org.
Scenic Regional Library Circulation Procedures

I. Lost Items

A circulation bill is created on the patron’s account when an item is six weeks overdue. The ILS pulls the price of the item from the item record to create the bill.

Patrons may also report to staff that an item has been lost. Staff will then change the status of the item from Checked Out to Lost in the patron’s account. The ILS will pull the price of the item from the item record to create a bill. Follow these steps if a patron reports loss.

1. Highlight the lost item in the patron’s list of Items Out.
2. From the Actions dropdown menu, select Mark Lost (By Patron).
3. The item will move from Items Out to Other/Special Circulations.
4. A bill for the lost item will be created.

Remember that we do not refund payments made for lost items. When patrons want to pay for lost items, tell them to keep the item if found after paying for it.

If patrons want to know the amount they will have to pay if an item is lost, staff can find that information in Item Status > Detail View.
XI. Offline Circulation

A. Offline Transactions

In the event that the internet or Evergreen is down, it is still possible to check out materials if the patron has their library card or the mobile app on a device that they have with them. During offline sessions, there is no way to check the patron or materials database, so the following tasks are not possible: Patron Search, Renew, Patron Registration, Check-in.

To enter offline circulation mode, follow these instructions.

1. Find the desktop icon for Offline Circulation and click on it.

Checking out is the only function that should be performed when using the offline interface.

One page of laminated instructions for using Offline Circulation is at the service desk in each branch. That page is also included here at the end of Section XI. Offline Circulation.
1. Make sure the **Strict Barcode** box is NOT checked.
2. Select the correct due date for the Due Date field.
3. Patrons MUST have their library card or mobile app to check out. If they don’t have their card, offer to hold their items and call them when the internet is working again.
4. Scan the patron barcode into the barcode field.
5. Scan the item barcode into the barcode field. There is an option for checking items that don’t have barcodes (magazines and fishing rods). Select Non-cataloged Type for these items.
6. As you scan item barcodes, they line up in the chart on the right side of the page. The patron barcode isn’t checked against the patron database and the item barcode isn’t checked against the catalog. All that is captured is numbers. If a bogus number is entered, that is the number that will be captured.

<table>
<thead>
<tr>
<th>Patron barcode</th>
<th>Item barcode</th>
<th>Due date</th>
</tr>
</thead>
<tbody>
<tr>
<td>9300721796</td>
<td>3006595998</td>
<td>6/14/2019</td>
</tr>
</tbody>
</table>

7. After scanning all of the items to be checked out, click **Check Out** then click **Save Transactions** so that you can help the next patron.
B. Processing Offline Transactions

It is imperative to complete the processing procedure before checking in any materials.

When the internet is again available and staff log onto the ILS, they will see this message.

1. Open **Offline Circulation**, the last item in the Circulation dropdown menu. You will see all transactions that are pending from the offline session.
2. Click **Offline Sessions**. Click **Create Session** in the resulting screen.
3. Give the offline session an appropriate name. Click **OK/Continue**.

4. The new session will now appear in the list of offline sessions that have involved that work station.
5. Click the **Upload** button that is at the right end of that line containing the name of the offline session that was just created.

6. The **Upload Count** column will then show the number of transactions that have been uploaded.
7. Click the **Process** button which is to the right to the Upload button.
8. When a date appears in the **Date Completed** column, processing has been completed. If you are processing many transactions, the **Refresh** button may need to be clicked in order to complete the process.
9. Highlight the session just created (if it isn’t already) and scroll to the bottom of the screen to check for **Exception**.

**Exception List**

<table>
<thead>
<tr>
<th>Workstation</th>
<th>Type</th>
<th>Timestamp</th>
<th>Event Name</th>
<th>Patron Barcode</th>
<th>Item Barcode</th>
<th>Non-cataloged Type</th>
<th>Checkout Date</th>
<th>Due Date</th>
<th>Checkin Date</th>
</tr>
</thead>
</table>
Common Exception Messages

ASSET_COPY_NOT_FOUND Indicates the item barcode was mis-scanned/mis-typed.

ACTOR_CARD_NOT_FOUND Indicates the patron’s library barcode was mis-scanned/mis-typed.

OPEN_CIRCULATION_EXISTS Indicates an item was checked out that had never been checked in.

PATRON_ACCOUNT_EXPIRED Indicates the patron’s account is expired.

Transactions with these messages have not been processed.
You need to renew items with the message OPEN_CIRCULATION_EXISTS if they are circulating with the previous patron OR check in the item and check it out to the new patron.

You need to check out the items listed with PATRON_ACCOUNT_EXPIRED to the patron with the expired account. We will update the patron information on the patron’s next visit.

When the ASSET COPY or ACTOR is not found, we can only hope for the best that our items will be returned because there is no way to identify the item or patron.
Offline Circulation

When the internet goes down:

1. Click on the **Offline Circulation shortcut** on the desktop.
2. Click on the **Checkout** button.
3. Do not check **Strict Barcode** or **Print Receipt**.
4. Use the **calendar widget** to set a due date.
5. Scan the **patron’s barcode**. Patrons must have their card or the mobile app.
6. Capture the **item barcodes** on the RFID pad.
7. Fill the radio button next to **Non-cataloged Type** to check out magazines and fishing rods.
8. Click **Checkout or Enter** to move the data to the field on the right.
9. **Click Save Transactions.**
10. **Repeat steps 3 - 8 for the next patron.**

When the internet comes back up:

1. A message will be displayed on the Evergreen home page saying that there are unprocessed transactions.
2. Login to Evergreen.
3. Open **Offline Circulation**, the last option in the Circulation dropdown menu.
4. The screen opens to show Pending Transactions.
5. Click on **Offline Sessions**.
6. Click **Create Session**.
7. In the resulting field, name the session “internet down mm/dd/yyyy.”
8. Your new session now appears at the top of the list of sessions.
9. Click the blue **Upload** button at the right end of the line for your session.
10. After the upload is complete, click the orange **Process** button next to the Upload button. Wait patiently. You may need to use the browser Refresh button to get the Processed count to match the Upload count.
11. Highlight your session’s line. Scroll to the bottom of the page to see if there are any exceptions that need to be repaired.
XII. Transit List

The Transit List should be checked weekly to keep on top of items that have gone missing in the courier or have been shelved without being checked in.

A. The Transit List is found in Administration -> Local Administration -> Transit List.

The Transit List can be set to search for items in Transit To your library/branch and in Transit From your library/branch. Choose a Start Date (for example, the date of our migration to Evergreen 1/13/2014) and an End Date of four weeks before the date you are running the report.
Print both the Transit To and Transit From reports. Print from the Column Picker. Select **Print Full Grid**. You only need to look for the items that belong to your library so you may want to sort the list by item barcode and only print the pages that display your items.

Look for items that belong to your library.

B. **Cancel the transit for your library’s items not found, and Mark Item as Missing.** Do not cancel transits for items belonging to other Missouri Evergreen libraries. The owning library is responsible for its items. Marking your items Missing will retarget holds for that item.

To cancel a transit, highlight the item whose transit you want to cancel in the Transit List. Then select the **Cancel Transit** button at the top of the list.

When a transit is canceled, a second function must be performed. It is never acceptable to leave an item in the status of Canceled Transit. For more information about
Scenic Regional Library Circulation Procedures


After canceling the transit for your items that weren’t found, mark the items missing. This can’t be done in the Transit List interface. There is no Action menu on this page. You will need to click on the item barcode in the Transit List which will take you to the Item Status-Detail View page. Here, you can select **Mark Item as Missing** from the Actions menu.

![Actions menu](image)

C. Items in route to your branch will be coming to either fill a hold or to be reshelved. If they are coming from another library, they are coming to fill a hold and a second hold needs to be placed for the patron.

1. Make sure you have a column for **Patron Barcode** in the Transit List. If the item is coming to you to fill a hold, the requesting patron’s barcode will be in that field. If the item is coming home for shelving, there will be no barcode in that field.

<table>
<thead>
<tr>
<th>Send Date/Time</th>
<th>Hold Type</th>
<th>Patron Barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/21/2020 8:46 AM</td>
<td>T</td>
<td>9301577089</td>
</tr>
<tr>
<td>12/16/2019 2:46 PM</td>
<td>T</td>
<td>9301577089</td>
</tr>
<tr>
<td>10/29/2020 1:39 PM</td>
<td>T</td>
<td>9301579944</td>
</tr>
<tr>
<td>9/4/2020 8:12 AM</td>
<td>T</td>
<td>9301577089</td>
</tr>
<tr>
<td>8/26/2020 5:29 PM</td>
<td>T</td>
<td>9301577089</td>
</tr>
</tbody>
</table>

2. The patron may have canceled the hold since the transit was set.
3. Copy and paste the patron barcode into **Check Out** to retrieve the patron’s record.
Scenic Regional Library Circulation Procedures

4. Look for the item among the patron’s Holds.
5. If there is still a hold on the title, place a new hold for this patron and Edit the Request Date so that he doesn’t lose his place in the queue. The Request Date can be found in the patron’s list of holds.

6. To edit the **Request Date**, select the hold you just created from the list of holds. From the Actions menu, select **Edit Hold Dates**. Edit the **Hold Request Date** in the resulting dialog box.

7. Add an **Alert** to the patron’s record explaining that a duplicate hold was placed and that when one item arrives, the second hold should be canceled.

**Items belonging to Scenic that have been in transit for more than 30 days should be reported to MALA (Mid America Library Alliance) using the online form at** [https://www.malalibraries.org/courier-service/courier-lost-damaged-report-form/](https://www.malalibraries.org/courier-service/courier-lost-damaged-report-form/) **Do not report items going between Scenic branches.**
XIII. Copy Buckets

Copy Buckets can be used to change the status of multiple items at one time. Scan the items whose location or status you want to change in Item Status. Check the box in front of all of the items in the list. Then from the Actions dropdown menu, select Add Items to Bucket.

In the dialog box, name your bucket in the lower field, Name For New Bucket. Click Add To New Bucket.

Now find Copy Buckets in the Cataloging tab or in the center column of the home page.
After you open Copy Buckets, find your new bucket in the list of buckets.

Click on your bucket. Check the boxes in front of all of the items in the bucket. From the Actions button, select Edit Selected Copies.

Below is what you will see. You can choose a new shelving location for all of the items listed at the left of the screen. Click Save & Exit after choosing the shelving location. Delete the bucket if you aren’t going to save it in order to move everything back to the previous location.
To delete a bucket, select the bucket from the Buckets drop down menu. Then Click Delete Bucket.
IV. Deceased Patrons

If the branch is informed that a patron has passed away, branch staff need to make the patron account inactive.

To deactivate a patron’s account, follow these instructions:

i. Click on the Search ->Search for Patrons button at the top of the home page or Search for Patron by Name in the Circulation and Patrons column.

ii. Make sure that the box next to Include inactive is checked.

iii. Make sure that the library identifier dropdown box is set to ME.

iv. Perform a search for the patron by using their last name and first initial.

v. Check the box on the line for the correct patron.

vi. Click the Edit menu button at the top of the patron information screen.

vii. Scroll down through the patron’s information to the Internet Access Level field.

viii. Under this field is a check box labeled Active.

ix. Uncheck this box to deactivate the patron.

x. Click Save.

xi. Add an explanatory Notes > Alert on the deceased patron’s account after it has been deactivated.
Appendix A

DAMAGED ITEM AND MISSING PIECES FORMS

Damaged Item Form

The Damaged Item Form can be found on the Staff Intranet in the Circulation Forms folder. Fill out this form entirely and attach it to the damaged item. Notify the patron of the damage. Keep the item and form for 3 months or until the patron pays, whichever comes first.

After the patron pays, give the damaged item form to your supervisor. The supervisor will delete the item from the catalog.

Missing Pieces Form

The Missing Pieces Form can be found on the Staff Internet in the Circulation Forms folder. Fill out this form entirely and attach it to the item that is missing pieces. Mark the item as Missing Pieces in Evergreen or check the item out to the patron who returned the item. Call the patron and tell him which piece is missing. Explain that the item will remain checked out to him until the piece is returned.

After the patron pays, send the item to HQ for a replacement part.
ASSESSING DAMAGE AND CHARGES for books and audiovisual materials

Scenic Regional Library charges the following amounts for damages. Charges must be manually entered in a specific patron’s record as grocery bills:

<table>
<thead>
<tr>
<th>Partial Damage Charges</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Broken DVD/CD case</td>
<td>$4.00</td>
</tr>
<tr>
<td>Lost DVD/CD case</td>
<td>$4.00</td>
</tr>
<tr>
<td>Lost/damaged AV insert or liner notes</td>
<td>$1.00</td>
</tr>
<tr>
<td>Lost disc in a multidisc set</td>
<td>$10.00</td>
</tr>
<tr>
<td>Broken disc in a multidisc set</td>
<td>$10.00</td>
</tr>
<tr>
<td>Lost disc attached to a book</td>
<td>$10.00</td>
</tr>
<tr>
<td>Broken disc attached to a book</td>
<td>$10.00</td>
</tr>
</tbody>
</table>

If a patron loses an item, or if an item is too badly damaged to circulate, charge the patron full price for the item.

No replacement copies are accepted. SRL only accepts payment for damaged or lost items.

There are no partial damage charges for books. Fines are only accrued when the book is removed from circulation. Damage from normal use is exempt. Examples of normal use include: broken spine, ripped Mylar book jacket cover, one torn or stained page.

Examples for which full price will be charged

- Exterior of book is in good condition but there are red juice stains on several interior pages.
- Book is wet when returned (other than random raindrops on exterior).
- Several pages look like they have been wet at some time — no longer flat; perhaps discolored.
- Any chew marks.
- Paperback book that has been mangled and no longer lies flat or has a missing cover.
- Crayon/pen scribbles; underlining; highlighting.
- Stains on more than one page.
  - Any stain that obscures print.
  - Any book that has pages stuck together by whatever-it-is.
- Books returned that smell really bad.
- More than one page torn or missing. One page can be repaired/replaced.
- Book cover disfigured with glue or tape.
- Bugs or urine in item.
Appendix C

Testing Patron Text Message Reception and Viewing Messages in the OPAC

A. When a patron reports that she isn’t receiving text message notifications for her holds, one way to diagnose the problem is through her online account. These instructions were provided by Poplar Bluff Public Library.

1. Log the patron into My Account from the OPAC

2. Navigate to an item record where location, call number, barcode, etc are listed and click TEXT beside the call number field

3. If text received, VOILA all is well.

4. If no text received, click on My Account at top of page

5. Click Account Preferences then Notification Preferences and change the wireless carrier and select Save. Then retest.
B. Messages, both email and text, that have been sent to patrons are visible in the patron OPAC account. In addition, information about holds that have been canceled can be found in the patron’s Message center. Patrons should log into their online account to view Messages. Clicking on the linked subject in the Subject column will open the message.

<table>
<thead>
<tr>
<th>Date</th>
<th>Library</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/14/2018</td>
<td>Scenic Regional-Union</td>
<td>Overdue Notification</td>
</tr>
<tr>
<td>09/30/2018</td>
<td>Scenic Regional-Union</td>
<td>Library materials overdue notification</td>
</tr>
<tr>
<td>09/29/2018</td>
<td>Scenic Regional-Union</td>
<td>Overdue Notification</td>
</tr>
<tr>
<td>09/17/2018</td>
<td>Scenic Regional</td>
<td>Account Expiration Courtesy Notice</td>
</tr>
<tr>
<td>09/15/2018</td>
<td>Scenic Regional-Union</td>
<td>Hold Ready for Pickup SMS Notification</td>
</tr>
<tr>
<td>09/15/2018</td>
<td>Scenic Regional-Union</td>
<td>Overdue Notification</td>
</tr>
<tr>
<td>09/15/2018</td>
<td>Scenic Regional-Union</td>
<td>Library materials overdue notification</td>
</tr>
<tr>
<td>09/14/2018</td>
<td>Scenic Regional-Union</td>
<td>Hold Ready for Pickup SMS Notification</td>
</tr>
<tr>
<td>09/13/2018</td>
<td>Scenic Regional-Union</td>
<td>Scenic Regional Library Courtesy Notice</td>
</tr>
<tr>
<td>09/12/2018</td>
<td>Scenic Regional-Union</td>
<td>Hold Ready for Pickup SMS Notification</td>
</tr>
<tr>
<td>09/11/2018</td>
<td>Scenic Regional-Union</td>
<td>Hold Ready for Pickup SMS Notification</td>
</tr>
<tr>
<td>09/11/2018</td>
<td>Scenic Regional-Union</td>
<td>Overdue Notification</td>
</tr>
<tr>
<td>09/10/2018</td>
<td>Scenic Regional-Union</td>
<td>Hold Ready for Pickup SMS Notification</td>
</tr>
<tr>
<td>09/07/2018</td>
<td>Scenic Regional-Union</td>
<td>Overdue Notification</td>
</tr>
<tr>
<td>09/04/2018</td>
<td>Scenic Regional-Union</td>
<td>Overdue Notification</td>
</tr>
<tr>
<td>09/01/2018</td>
<td>Scenic Regional-Union</td>
<td>Library materials overdue notification</td>
</tr>
<tr>
<td>08/31/2018</td>
<td>Scenic Regional-Union</td>
<td>Hold Request Cancelled</td>
</tr>
</tbody>
</table>
Appendix D

Floating Collections

When materials in our floating collections have over filled the shelves in your branch, items can be moved to another branch. Follow these steps.

1. **Always shift** the collection before sending materials to other branches.
2. If after shifting there is not at least six inches of empty space, it is time to move materials to another branch.
3. **Email** the managers email list, including the number and shelving location of the items that need to be moved.
4. **Reply All** to these emails when you can take some or all of the materials. Include the number of items you will take in the email.
5. Keep in mind that 10-12 books take up about a foot of shelf space.
6. **Check out** the surplus materials to the branch Transit account.
7. Wrap the transiting items with two rubber bands forming a cross. Slip a piece of paper telling which branch is receiving the items in the intersection of the crossed rubber bands.
8. When the items arrive at the new branch, **check them in**.
9. Use the Transit account only for these transits. Don’t use it for other library business.
Appendix E

Patron Groups

Scenic Regional Library does not group its patrons. We do not hold individual family members responsible for the bills of other family members. Patron groups are created when the **Save and Clone** feature is used when registering patrons. Always select **Save** after completing the registration form. Never select **Save and Clone**.

If you find that patrons are in a group, ungroup them. This discovery is usually made when a message about Group Fines is found on a patron’s account. To ungroup, follow these steps.

1. Open the **Other** dropdown menu in one of the grouped patron accounts. Select **Group Member Details**.

2. In the resulting list of patrons, highlight the ones that need to be removed from the group. Use the Actions menu to **Remove Selected from Group**. There should only be one person left in the group.
Appendix F

RFID Pad Use at the Service Desk

We use two functions of CircIT – Tag Programmer and Checkin (or Checkout). Checkin and Checkout provide the same functions so it doesn’t matter which you are using.

- **Tag Programmer** codes the item barcode to the tag.
- **Checkin** (or Checkout) connects the RFID pad to Evergreen.

✓ When you have the Evergreen Checkin screen open, items placed on or near the pad will be checked in. You may place a stack of items on the pad to check in more than one item at a time. **Watch the screen** to make sure all items in the stack were checked in. Receipts will automatically print for items that need to transit to another library and that need to be put on your hold shelf. Find the title or barcode on the slips and match them with the corresponding items in the stack.

✓ When you have a patron screen open to the Checkout function, items placed on or near the pad will be checked out to that patron. **Watch the screen** to make sure all items in the stack appear in the patron’s Checkout field.

To switch between the two functions, access MODE in the Tag Programmer and the CircIT shortcut in the task bar.
When the Tag Programmer is in use and you want to switch to Checkin, open Mode in the top left of the screen and select Checkin.

The Tag Programmer screen will disappear and a new CircIT shortcut will appear in the right side of the bottom task bar. It is a blue-and-yellow square (Checkin) or red-and-yellow square (Checkout) or the letter R in a square (Item Status).

When the Checkin mode is in use and you want to switch to the Tag Programmer, RIGHT CLICK on the blue-and-yellow shortcut square and select Tag Programmer from the menu.

The Tag Programmer screen will appear and you will be ready to code a tag.
Appendix G

Shelf Reader Wand Operation

Contents of the portfolio bag

- Exterior pocket: instruction sheets and power cord for tablet
- Interior pocket: tablet in soft case
- Main compartment: box containing the wand and its battery and charging cord

The battery for the wand must be charged at least every six months or it will fail to operate.

The tablets are touch-screen and have keyboards attached.

Each wand is paired with a specific tablet. Check the SSID# on the back of the wand and tablet to make sure they are the same number.
A. After opening the tablet, turn it on. There is a soft button on the top left edge of the screen.

B. Check the bottom task bar to make sure that -----

1. The dongle is being read. The dongle is the mini-flash drive that is part of the tablet. You will find it along the right side of the screen. It should never be removed. If there is no icon for the dongle, we will have to troubleshoot.

2. The battery has power.

3. The tablet is connected to wifi. If a globe is displayed rather than a satellite, click on the globe and log in either to Scenic or Scenic Staff.

C. Only one program should be run from the tablet: CircTRAK. Click the icon to open the program.
D. The internet connection must be the **Library Connection** rather than the **Reader Connection**. If the wand isn’t working, click on the internet icon to make sure the connection is Library. If necessary, use the dropdown menu to change the connection.

E. Turn on the wand. There are two buttons on the wand. The one closer to the bottom of the wand is the power button. The other button is a boost button and is rarely used. It may help when scanning next to a lot of metal. It discharges the battery twice as fast as non-boost mode.
F. The white antenna light will first blink slowly then quickly as the wand connects to the tablet. When the white light turns off, the wand is connected to the tablet and is ready for use. Wait for the light to turn off before trying to use the wand. During operation, if you see an alert saying the connection to the wand has been lost, turn off the wand and restart it.
Appendix H

Shelf Reader Wand Use – Looking for Items with Statuses Other Than Available

The shelf reader connects to our ILS through wifi. It reads the programmed tag, matches the information on the tag with the item record, and reports on the status of the item. When an item is found that is not Available, the screen turns red and a <boing> sound is generated. Information about the not-Available item is listed in the Found List field of the tablet. Staff take the Found items to the circ desk to correct the error. These errors will be identified on the CircTRAK screen:

- Charged (checked out)
- In Transit
- Missing
- Lost
- Other (Discard/Weed, not in the catalog, or incorrectly tagged)

The shelf reader will capture RFID tags that are within a twelve inch bubble of the reader. It is NOT linear. Items on the shelves will not be captured in order. Items on the shelves above and below the shelf you are scanning may be captured. Ensuring the you scan each item on the shelf is not the goal. After scanning a shelf, do NOT check to make sure every item has been scanned.

Slowly move the wand along the shelf with the wand parallel to the spines of materials, no more than six inches from the items. Scan two to five shelves before resetting the scan.
To use the wand to scan the collection, follow these steps.

1. Turn on the tablet.

2. Turn on the wand.

3. Open the CircTRAK program.

4. Select ILS Search from the function options.

5. Select Find All Items.

7. Scan a few shelves.

8. Available items will fill the Read List field on the right from the bottom to the top.

9. Items in bad status will appear in the Found List field on the right AND the Found List on the left. A noise will sound and the Read List will turn red when an item is Found.

10. Pull the items on the Found List. Set them aside to check in or otherwise take care of.
11. **Lost items** need to be researched. Check the item in then find the last patron to have the item. Check the account for bills. If there is a bill on the patron’s account for the item, send the patron a Billed Item Has Been Found letter. It is available in the staff intranet Circulation > Forms folder.

12. If there is an item in the Found List with the status **Other**, the item is either on the weeding list or is no longer in the catalog. Checking the Item Status of the item on the RFID pad at the service desk will tell you which category the items belongs to. If the status is Discard/Weed, delete the item from the catalog and put it in the book sale. If the status is “Item not found,” put it in the book sale.

13. If there is an item in the Found List with the status **Other** and a barcode of **3003121664**, the tag in the item hasn’t been programmed correctly. You will need to take four or five items away from the shelf and scan them, until you find the one that scans as Other. Take it to an RFID pad, erase the tag, and program the tag with the correct barcode number.

14. Items in the Found List that have the statuses **Charged, In Transit, and Missing** need to be checked in.

15. After scanning a few shelves, click **Reset** to begin again.

16. When you are finished scanning, click **Stop**.

17. Click **Main Menu**.

18. Click **Exit**.

19. Use the Windows icon to turn off the tablet.

20. Hold down the power button on the wand until it shuts off.
Appendix I

Paper Applications

Spanish language applications and applications completed at outreach events are completed on paper forms to be entered in Evergreen later. After eligibility and proof of identification/address have been verified, enter the patron’s information onto the Library Card Application.

1. The staff member should fill in all required information:

- **Last Name, First Name, Middle Name**
- **Parent/Guardian Name** – if under 16
- **Mailing Address** – PO Boxes will go here
- **Street Address** – physical, residence address
- **Phone 1**
- **Phone 2** – optional
- **Date of Birth, Email Address**

2. Ask how they would like to be notified for reserved items. Record the carrier if they wish to be notified by text message.

3. Have the patron verify that the information is correct and sign the form.

4. Check the photo ID and address verification and mark their respective boxes.

5. Select the issuing branch and the patron type from the choices given.

6. Create the account when you return to your branch.

7. Write the barcode number, date, and initial the Library Card Application.

8. Paper forms must be sent to the SRL IT department for digitization after the patron information has been entered into the ILS.