

## Notes from the Circulation Roundtables

### Credit card payments

Patrons can pay for outstanding fines (any type) if they are logged into an Enterprise instance for any public library.

Patrons may choose which fines they want to pay

The system accepts major credit cards including Visa, Master Card, Diners Club, and American Express. Debit cards may be used if they have a credit card symbol but otherwise they are not accepted. PayPal accounts are also not accepted.

Patron's accounts should be cleared as soon as the payment is submitted and the patron receives a confirmation number. Patrons may select email notification of payment submitted but they must enter their email address manually. The system doesn't look at their record for the email address

Problems have been reported if 1.) Patrons exit the browser before they received confirmation that the payment has been processed and 2.) Family linked cards are not always cleared. When problems take place the patron's card is charged but the patron record is not cleared. If this is reported to staff, email [support@sailsinc.org](mailto:support@sailsinc.org) and SAILS can manually clear the record. Transactions are also checked every morning and patron records that were not updated will be updated then.

This is a web based service only – staff members should not touch credit cards.

Billing libraries receive reimbursement from SAILS once a month except in the case of lost or damaged items in which case the owning library is reimbursed.

There are issues when a patron returns a lost item after they have paid for it. SAILS should be contacted to see what if anything can be done.

### Circulation contacts - moving to generic accounts

The Circulation Policy Committee recommended that each library establish a generic email account for a standard method of contacting the library regarding circulation issues.

An email was sent to library directors asking for his/her preference.

The choices for your library are as follows:

1 - \*recommended - A group account can be created where 1 or more people are members of the group. The emails will be forwarded to all group members. If a staff member leaves the library, SAILS needs to remove the person's email from the group. If someone from the group goes on vacation, other members will still receive the email.

2 - A generic email address is created where multiple people will have access to read the email - either using an email client or the Gmail interface. This would be a second account that needs to be checked (con) or it could be set up to forward to individual accounts, similar to a group (pro). If someone goes on vacation, others have access to this account (pro). If someone leaves the library, others have access to this account (pro).

3 - An individual can be automatically forwarded emails from a generic email address (pro). If the staff member leaves the library, someone else will need to be set up to receive the emails (con). If the staff member goes on vacation, someone else needs to have access to that email account (big con).

### Patron Circulation History

Patrons with a large number of items in their charge history can experience problems logging into their account. Libraries may experience long delays when trying to access the patron's account for circulation. SAILS can trim the number of items in a patron's record to reduce response time.

Initially the Circulation Policy Committee had recommended that the network set a threshold for the number of items that can be kept in Charge History but upon investigation the issue is more complicated. SAILS staff have followed up with SirsiDynix.

Bills for lost items –

SAILS will be sending out 2 follow up bills for items set to lost that have not yet been paid for or returned. These bills will be sent out once a month. Libraries will be able to create their own message.

☞ TIP Use UND in usercat4 to indicate a patron's address is undeliverable. This will prevent notices from being printed.

☞ TIP SAILS can produce reports that will list patrons who have accumulated large amounts of fines – for example over \$100.00. This report can be produced on demand or on a regular schedule. Requests for this report should be sent to support@sailsinc.org

Items set to Claimed returned reports

All public libraries receive a list of items that had been set to claimed returned 90 days before the report was generated. The report is run once a month. Libraries are asked to follow up on these items and either bill the patron for the lost item or set it to missing. This prevents these items from being flagged as available to fill holds.

Libraries are reminded they must contact the owning library of an item before setting it to claimed returned.

Billing for damaged items – circulating library or owning library?

Network policy is that patrons should receive invoices and communications from libraries that they use. Circulating libraries should invoice patrons for items that are damaged. The network has a procedure for returning these to the owning library.

<http://www.sailsinc.org/Corpdocs/CircPolPro.pdf> - page 6

If the owning library receives something that is damaged and it can be determined it was done by the last user it should contact the circulating library and request that the patron be invoiced for damage.

There is a problem item slip that should be used when returning a damaged item.

<http://www.sailsinc.org/circulation-desktop/>

Number of holds - increasing the number. Days on hold shelf (how that works)

The Circulation Policy Committee recommended that Adult and Senior card holder profiles be updated to allow up to 30 holds. This change was approved and is now in place. The network will not be advertising this change.

If libraries are concerned about space, the network can modify the number of days items stay on the shelf list.

DVD-Set item type

The Circulation Policy Committee has recommended that all libraries use the item type DVD-Set for DVD sets with large numbers of DVDS (specifically TV Series). It was noted that due dates are set by the CIRCULATING library and not the owning library and it is important that patrons have a consistent due date for similar items.

Registering patrons who have moved from one SAILS library to another – when to issue a new card –

If a patron moves from one SAILS library to another the recommendation is that the library issue the patron a new card. The old patron record should be updated with the new information rather than creating a completely new record.

Patron barcodes are used for authentication for licensed databases so if a patron indicates they want to use another library for service but they haven't moved the library in the BASIC Tab of the patron record can be updated. This will mean the patron can use this library for a pick up location but won't be using the resources of the library not in their home community.

If a patron does not have a library card at all in SAILS they may register at any SAILS library.

☞ TIP – If a patron needs a replacement card and doesn't want a new id number a library may use its barcode duplicator to make a copy of the original barcode and put that on a new plastic card. This eliminates the need to update the patron record AND update the patron's Overdrive account.

Sample patron registration form (thanks to Lakeville Public Library) <http://www.sailsinc.org/patron-records>

☞ TIP – The network strongly recommends that each library establish a record retention policy regarding paper copies of card applications. Maintaining large paper files of patron applications that are not secured is a threat to patron confidentiality and privacy. Libraries should maintain paper records for as long as it takes to make sure the information is correct and then destroy the paper records.

### Announcements

Two Searching for Circulation Workshops are scheduled to be held at SAILS in December.

December 9 – 10 a.m. - [Register](#)

December 10 – 1 p.m. - [Register](#)

Circulation Users Meeting (all libraries) – June 7 at 10 a.m. (Lakeville Public Library)