



Evergreen Indiana Circulation Procedures

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DEFINITIONS

- Owning library:* Library that owns the item in question
- Circulation library:* Library from which an item has been checked out
- Patron:* An individual who has an Evergreen Indiana patron account
- Home library:* Library associated with a patron’s account
- In good standing:* Fines and fees are not above the consortium maximum of \$10.00

Members of the Evergreen Indiana Library Consortium agreed to operate under uniform circulation policies and procedures pursuant to the terms of the Evergreen Indiana Membership Agreement.

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

REGISTERING A PATRON

Patron Profile

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

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

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

- Staff

Resident, Outreach and Staff cards are valid for two years. Nonresident and Reciprocal Borrower cards are valid for one year. Student, Temporary, Computer Usage, PLAC and, in some cases, Reciprocal Borrower, card expiration dates are set by the issuing library and may be less than one year.

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

All patron information should be entered into Evergreen in all caps and according to the USPS style guide. Please avoid entering the email address in all caps and enter it as it is given by the patron. The USPS style and format guide is available at:

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

How to Issue an Evergreen Indiana Library Card

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

Indiana residents not residing in a library district may be eligible to purchase or otherwise obtain an Evergreen Indiana Library card as a non-resident, PLAC, reciprocal borrower, student or township contract user subject to the laws and regulations covering these types of cards.

Confirmation of No Current or Prior Evergreen Indiana User Account

A search of the patron database, including “everywhere” and “inactive,” should be executed to ensure that the individual seeking an Evergreen Indiana card does not already have an account. If accounts with similar or identical names are returned in the search results, the identification and address information of the applicant should be compared to the information in the existing accounts. In the event there is no identification information in the existing account, the home library should be contacted to ascertain if there is non-electronic “legacy” data that did not migrate but which is still retained at the library that may help resolve whether there is or is not an account already in the applicant’s name.

Determining and Assigning the Patron Profile

- **Resident:** assigned to Indiana residents that reside in the library district or own real property taxed for library service that is located in the library district.
- **Nonresident:** assigned to Indiana residents that purchase a nonresident card pursuant to IC 36-12-2-25(b)(2). Only one Evergreen Indiana card should be issued for each nonresident fee paid. Nonresident cards may be issued pursuant to township and other contracts if the contracted amount is equal to the fee charged by the library pursuant to IC 36-12-2-25(b)(2).

- **Outreach:** assigned to an Indiana resident that resides in the library district or an institution located in the library district. For example, homebound individuals or day care or senior facilities.
- **PLAC:** assigned to an Indiana resident purchasing a statewide library card pursuant to IC 4-23-7.1-5.1. The expiration date on the PLAC is card is set to one year, or less, if the underlying card expires in less than one year from the date of issuance.
- **Reciprocal Borrower:** assigned to Indiana residents who hold a valid library card from a non-Evergreen Indiana library that has entered into a reciprocal borrowing agreement with the library. Patrons assigned this profile should be given a blue Evergreen Indiana card to indicate that the blue Evergreen Indiana library card is valid only at the library issuing the library card.
- **Reciprocal Borrower:** assigned to Indiana residents who obtain an Evergreen Indiana library card pursuant to a township or other contract when the amount received by the library issuing the card is less than the nonresident card fee set by IC 36-12-2-25(b)(2). Only one Evergreen Indiana card should be issued for each nonresident or other contractual fee paid. Patrons assigned this profile should be given a blue Evergreen Indiana card to indicate that the blue Evergreen Indiana library card is valid only at the library issuing the library card.
- **Reciprocal Borrower:** assigned to Indiana residents who obtain an Evergreen Indiana library card pursuant IC 36-12-2-25(b)(4) (employees of a school corporation or nonpublic school located in the library district). Only one Evergreen Indiana card should be issued for each individual. Patrons assigned this profile should be given a blue Evergreen Indiana card to indicate that the blue Evergreen Indiana library card is valid only at the library issuing the library card.
- **Staff:** assigned to individuals that are employed at the library. This profile should not be assigned to board members, volunteers or friends of the library. Library staff should not use their Evergreen staff-client account to circulate materials. *See Employee Staff Card Policy* for additional information.
- **Student:** assigned to Indiana residents who do not reside in the library district but who attend a K-12 public or private school located in the library district. This card “may” be issued by Evergreen Indiana libraries as authorized pursuant to IC 36-12-2-25(d). Do not use this card for “teachers” or as a “juvenile” card. Patrons assigned this profile should be reminded that the issued Evergreen Indiana library card is valid only at the library issuing the library card. Patrons assigned this profile should be given a blue Evergreen Indiana card to indicate that the blue Evergreen Indiana library card is valid only at the library issuing the library card.
- **Temporary:** assigned to an individual that does not reside the full year in the library district. Examples include relocated workers and summer home residents.
- **Computer Usage:** cards do not have check-out privileges and libraries may establish their own identification requirements for issuing cards under this profile. Patrons assigned this profile should be reminded that the card does not come with circulation privileges and is

valid for computer use only at the library issuing the card. Patrons assigned this profile should be given a blue Evergreen Indiana card to indicate that the blue Evergreen Indiana library card is valid only at the library issuing the library card.

“Limited Access” profiles are assigned at the request of the parent or guardian. The profile limits access to “R-rated” audio visual materials. The library is not “required” to assign the “limited access” profile to a minor. Parents and guardians have the option of selecting “Limited Access” patron profiles for their children.

Resident, Outreach and Staff cards are valid for two years. Nonresident and Reciprocal Borrower are valid for one year. Student, Temporary, Computer Usage, PLAC and, in some cases, Reciprocal Borrower, card expiration dates are set by the issuing library and may be less than one year.

Required Identification: Establishing Identity and Residency

An applicant for an Evergreen Indiana library card must present the required Proper Identification in person at the Evergreen Indiana library that will issue the library card (*see below* for definition of “Proper Identification”). Property owners who do not reside in Indiana will be required to show proof of real property ownership, such as a tax bill or deed.

A parent or legal guardian showing Proper Identification may register a minor child for an Evergreen Indiana library card. Additional proof of guardianship may be required. Emancipated minors are required to present evidence of their status to void the necessity of the presence of a parent or guardian.

Proper Identification must be presented to apply for an Evergreen Indiana library card. Recommended Identification is one of the following, provided the item is a photo id:

- valid Indiana Driver’s License
- valid Indiana State Identification
- valid U.S. Government issued Identification (e.g., passport, military identification, permanent resident card issued by Department of Homeland Security or Immigration Services)
- valid identification issued by another State (e.g., Driver’s License)
- valid current university or college identification (e.g., Student identification)

If the presented Recommended Identification does not display a current address located within the library district, the applicant must also present one item from the Recommended List to establish residency. The ID presented from the Recommended List must include a current address:

- valid voter registration card
- ~~valid current U.S. government issued ID (e.g., military ID, passport)~~
- computer generated bank statement issued in applicant’s name within the last 30 days
- computer generated utility, credit card company, doctor or hospital bill, issued in applicant’s name within the last 30 days and containing address of residence
- Medicaid or Medicare benefit statement issued in the applicant’s name within the last 30 days
- Change-of-address confirmation from the United States Postal Service showing prior and current address of residence (a P.O. Box is not acceptable as a residence address)
- apartment lease signed within the last 30 days
- property tax receipt issued in applicant’s name

In order to verify address, member libraries may choose to accept other forms of identification to establish current address and/or to mail the library cards to the patron.

Parent or guardian identification information should be presented and entered into the patron record when creating the minor's record. The minor's identification (*i.e.*, driver's license) may be entered under "other" but it is not sufficient for the issuance of an Evergreen Indiana library card.

Issuing the Evergreen Indiana Card

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

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

My Account

Library patrons will be given a PIN upon registering for an Evergreen Indiana library card. PINs may only be given in person at an Evergreen Indiana Library upon presentation of appropriate identification. PINs may not be obtained via telephone or email.

At their first use of the *My Account* feature of the OPAC, it is recommended that patrons change the PIN to a minimum 7-character password. Patrons may also choose to select a user name to use in place of the library card barcode when accessing *My Account*. **User names must be unique within the Evergreen Indiana system and must be used to log into My Account henceforth.** Patrons may change user name, password, and email address with *My Account* at any time.

Replacement Card

The procedures for issuing a replacement library card are the same as the issuance of the original library card. *See above* "How to Issue an Evergreen Indiana Library Card" for application procedure and identification requirements. There is a \$2 fee for a replacement card **that can be paid immediately or billed later depending on local library policy.**

Patron Record Modification

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

Staff at member libraries should refrain from modifying a patron record of another member library if the patron does not present his or her Evergreen Indiana library card.

Updating Expired Patron Accounts

Staff members at all Evergreen Indiana libraries can renew expired Resident patron accounts if the patron's ID matches the Evergreen Indiana account information and the patron account is in good

standing. All other patron accounts (non-resident, reciprocal borrower, student) can only be renewed at the patron's home library.

Staff members choosing to update a resident patron account at a different library than the patron's home library should create an alert in the patron's account to notify the patron's home library with the following text: *Patron account was updated at [name of staff member's library] on [date].*

Merging of Patron Records

Duplicate patron records (*i.e.*, two accounts for the same individual) should be merged to create one record. If one or more of the accounts are not at the same library, both (or all) member libraries must consent to the merging of the records. A joint request to merge the records should be sent to tech support to accomplish the action. See [Appendix B](#) for further instructions. Multiple accounts at the same library may be merged by the library. Prior to sending the multi-library merge request or executing the merge at the local library level, all current identification and address information should be transferred to the record that will be the resulting record.

[A note should be placed on the accounts indicating that the accounts have been merged. The note should include a statement as to the reason for and date of the merge, the resulting card and identify the staff person that approved the merge. For example, "Account 93456 0000 0045 was merged into account 99890 0000 8769 on March 10, 2010 because the patron had two Evergreen cards. MJS, at Smithville Library."]

Patron Confidentiality

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

Purging of Inactive Patron Records

Inactive patron accounts that do not reflect fines or fees, items checked out or claims returned activity will be purged one (1) year from the date of being last used. Member libraries are required to review patron records and mark records "inactive" or delete the patron's account if expired or unused by the patron during the previous twelve (12) months. Those staff members with the highest level of permissions in the local library system have the ability to delete patrons when the home library of the patron matches the local library of the staff member.

Evergreen Indiana Patron Moves to another Evergreen Indiana Library System

If the patron moves from one Evergreen Indiana library system to another, issue a new card to that patron and, change the home library of the patron from the old library system to the new library system when you update identification, address, email and telephone information in the patron record. The patron will now be included in reports of all patrons registered in the new home library system. A patron should be encouraged to pay all fines and fees prior to moving his or her account to a new library district.

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

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

Borrowing Privileges

A patron must present a card in good standing to borrow materials. **Any and all accounts linked to the patron may be reviewed to determine whether they are in good standing.** A digital replica of the library card is also an appropriate form of identification for a patron to check out materials. If a library staff member questions the digital replica, staff have the right to ask the patron for a photo I.D. A patron's card will be blocked, and no services may be obtained with it if the patron has 15 or more overdue items, or owes \$10 or more in unpaid fines and/or fees. Outreach patrons will not be blocked until they have 50 or more items overdue.

Delinquent borrowers who have not reached these limits may still borrow materials; the system operator will be notified that the patron is delinquent. The number of overdue materials and/or amount of fines/fees that will result in a patron being "blocked" is calculated at the consortium level and not at the library level.

The staff client displays patrons in good standing in "green." Patron accounts displayed in "orange" indicates there are fines or overdues and a "purple" display indicates that the patron has hit the fine or overdue threshold and is now blocked. Barred patrons display in "red." **"Turquoise" indicates that there is a message on the account. "Gray" indicates that the patron account is expired. "Black" indicates that the patron account is inactive.**

CHECK-OUT

Loss of Privileges

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

User blocked

If a patron's record is blocked due to overdue materials or fines and fees, a **PATRON EXCEEDS-FINES** message will appear upon attempting a checkout. Selected staff will have the authority to override fines and fees. One staff override per check-out session is required. The number of overdue materials and/or amount of fines and fees that will result in a patron being "blocked" is calculated at the consortium level and not at the library level. A patron's record will remain blocked until the fines and fee balance on the account is less than \$10.00. A patron's card may be "blocked" if related group or family member cards are "blocked."

User barred

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

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

Fines/Fees

To encourage the prompt return of materials, the Evergreen Indiana libraries have established a schedule of fines and fees as an encouragement for the timely return of materials by the date due. Overdue materials incur fines of 25¢ per day per item. Patrons may pay all or a portion of the outstanding fees and fines on the library account.

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

Overdue Notices

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

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

Overdue notices are notices are generated for each library. The print notices are made available to the library via a unique URL. Each member library must access the URL and review the print notice PDF. The library should then mail the print notices. Print notices are not generated and mailed by the consortium. To access the print notices: type in the following URL:

<https://evergreen.lib.in.us/notices/xxxx/index.html>

(Substitute the xxxx with your library's short name abbreviation, *e.g.*, Greenwood Public Library would use GWPLG.)

The following screen will display:

A screenshot of a login form. At the top, it says "Please log in to view this report". Below that are two input fields: "Username or barcode:" and "Password:". A "Log in" button is located below the password field. The entire form is enclosed in a red oval.

Enter your Evergreen log in and password (e.g., local admin or circ log-in).

The following screen will display with a link for each day. Click on the link and the PDF will display. Please note that notices are automatically deleted after 30 days.

Greenwood County Printable Overdue Notices

- [gwplg-45day-2010-04-16.pdf](#)
- [gwplg-45day-2010-04-18.pdf](#)
- [gwplg-45day-2010-04-19.pdf](#)
- [gwplg-90ormoreday-2010-04-15.pdf](#)
- [gwplg-90ormoreday-2010-04-17.pdf](#)
- [gwplg-overdue-2010-03-20.pdf](#)
- [gwplg-overdue-2010-03-21.pdf](#)
- [gwplg-overdue-2010-03-22.pdf](#)
- [gwplg-overdue-2010-03-23.pdf](#)
- [gwplg-overdue-2010-03-24.pdf](#)
- [gwplg-overdue-2010-03-25.pdf](#)
- [gwplg-overdue-2010-03-26.pdf](#)
- [gwplg-overdue-2010-03-27.pdf](#)
- [gwplg-overdue-2010-03-28.pdf](#)
- [gwplg-overdue-2010-03-29.pdf](#)
- [gwplg-overdue-2010-03-30.pdf](#)
- [gwplg-overdue-2010-03-31.pdf](#)
- [gwplg-overdue-2010-04-01.pdf](#)

A first overdue notice will be generated and can be sent via email or U.S. First Class mail 14 days after the due date. A second overdue notice will be generated and can be sent via U.S. First Class mail 28 days after the due date.

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

CHECK-IN

Check-In

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

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

Returned materials which are owned by other Evergreen Indiana libraries are to be promptly returned via Evergreen Indiana’s InfoExpress.

Lost Items

A patron may inform library staff that an item is “Lost.” The price of the item and any outstanding fines and fees, plus a processing fee of \$10.00 per item, will be assessed to the patron’s card. The item should be marked “Lost” by the owning library. In the event, the circulating library is not the owning library, the circulating library should inform the owning library that the item is “lost” to stop additional fines from accruing and to enable the owning library to begin collecting for the lost materials.

Lost items shall be paid for at the owning (billing) Evergreen Indiana library. The price of the item (found in the item record) and any outstanding fines and fees, plus the applicable \$10.00 processing

fee will be assessed to the patron's record upon declaration that the item is "LOST." Encourage patrons to notify the library that the item is "Lost" to stop additional overdue fines from accruing.

If an item marked Lost is returned to the non-owning library, the item should be checked-in and transited back to the owning library. The system will not automatically delete fines and fees upon checking in a returned lost item. When the owning library receives the item, they can decide based on local policy what to do with the item and associated lost fees.

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

No refund will be given to a patron for a "Lost" item for which a patron has paid. Fines, fees and third party collection fees are not refundable.

Records of lost materials should not be deleted from the system until six months after the 45 day notice is sent. If an item is not recovered six months after the 45 day notice is sent to a patron, library staff may delete the record from the Evergreen Indiana catalog.

Damaged Items

Library staff may note or a patron may inform library staff that an item is "Damaged." The owning library should be contacted to determine how to assess the patron for damage.

Claims Returned

If a patron claims to have returned materials that Evergreen Indiana still shows as checked out, the material may be marked with a "Claims Returned" date by the owning library only. Overdue fines stop accruing as of the date entered in the "Claims Returned" field. A user may have up to three (3) Claims Returned items on his or her record at any time. The number of Claims Returned items is calculated at the consortium level. Only the owning library may mark the item as "Claimed Returned." The circulating library must contact the owning library of the item to inform them that a patron claimed to return the item. The circulating library cannot mark an item they do not own as claims returned. The owning library is encouraged to periodically revisit items marked "Claims Returned" and resolve the issue with the patron. A hold on an item marked "Claims Returned" should be retargeted.

Renewals

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

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

Bookdrop Check-in

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

TRANSIT

Intra-Evergreen Indiana Lending

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

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

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

In the event the item pulled to fill a hold is older or damaged, the library filling the hold is advised to consult with and inform the library requesting the hold that the item is in less than desirable condition. The requesting library may then make the decision to have the hold filled, re-targeted or cancelled.

Borrowed items should be sent back to the owning library or on to the next Evergreen Indiana Library to fill a hold in a prompt manner. Patrons may return any borrowed item to any member library for transit back to the owning library.

Proper Intra-Evergreen Indiana Transit Procedures

The following transit procedures are to be followed:

- A transit receipt must be printed out by the library filling the hold and/or by the library checking-in the item for return to the owning library.
- The transit receipt should be placed inside the front cover and first page of the item. Do not tape, paper clip or otherwise attach the transit receipt to the item.
- Magazines should be transited in envelopes of the appropriate size to protect the item.
- Items should be appropriately packaged to protect them from damage while in transit. Libraries are encouraged to re-use/recycle envelopes and other packaging material to protect items. For example, audio books should be wrapped in multiple layers of newspaper or bubble wrap.
- Multiple part items such as “kits” or “realia” should transit with an inventory detailing all the parts. The inventory should include a list of all parts and the barcode. The transiting and receiving libraries should review and confirm all parts are sent and received. The inventory should be checked again when it is returned by the patron and before the item is checked-in. No item should be checked-in if a part is missing. The patron should be informed of any missing parts. The inventory list should be checked again when the item is prepared for transiting back to the owning library and again upon receipt at the owning library. An example of an inventory is attached hereto as Appendix C.

Intra-Evergreen Indiana Lending Circulation Periods and Costs

Materials will retain the circulation period assigned by the owning library regardless of whether the patron is local or from another Evergreen Indiana library. When thinking of Intra-Evergreen Indiana

lending, it is important to remember that an Evergreen Indiana patron is a patron exactly like your local patron. Intra-Evergreen Indiana Lending loans are *not* Inter-Library Loans (ILL) – they are simply circulations like any other.

ILL

Interlibrary Loan Lending

Reciprocal Borrower and Student user profiles have access only to the member library issuing the Reciprocal Borrower or Student card. The member library may request items for these patrons from the other member libraries via traditional Interlibrary Loan. An item may not be requested via the hold/transit Intra-Evergreen lending process. The item must be requested and processed by the member library making the request and the member library filling the request via Interlibrary Loan using the procedures set out in the Indiana Library Resource Sharing Manual.

Interlibrary loans from non-Evergreen libraries are circulated using pre-cat. Patrons and staff are renewing the "pre-cat" ILL items when such items should not be renewed. To provide a reminder, modify the item's title when entering the pre-cat record to include "ILL-No Renewals" as part of the title. In addition, when you check out the item to the patron, immediately renew it with the same due date to set the possible renewals to "0". The procedure also has the benefit of providing two visual clues to staff and patrons that the item is not renewable. It may also be helpful to verbally remind the patron when the item is picked up that it is not renewable.

Example, item is "Blue Smoke" by Nora Roberts. In the pre-cat title entry, insert "Blue Smoke (ILL-No Renewal)" as the title of the item. Renew the item when the item is checked out to the patron to set the renewal limit to "0."

HOLDS

Holds and Intra-Evergreen Indiana Lending

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

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

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

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

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

- Reference materials
- Bestsellers with the no-hold designation

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

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

Although holds may not be placed on the above materials by a non-local patron, these items *may* be borrowed by any Evergreen Indiana library card holder who has privileges at the owning library. The item must be checked out at the owning library. The patron may return such materials to any Evergreen Indiana library for transit to the owning library.

In addition, a library may place a six-month age protection on new items. **This means that non-local patrons may place holds but the holds will not be filled until the six-month age protection expires.** Local patrons may place holds on such items.

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

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

Patron Authorization of a Designee to Pick up Holds

The Evergreen Indiana patron placing the hold is the only individual who may pick up the item when it arrives at the pickup location. A member library may choose to establish procedures allowing someone other than the card holder to pick up holds. Such procedures should include prior authorization by the patron and proper record keeping in the patron's record. All member libraries should honor a patron's request to allow a designee to pick up holds. Suggested implementation steps include:

- Documented contact of the library by the patron in the patron's account. For example, an alert on the Evergreen Indiana patron's record indicating that he or she has contacted the library, the date, the identification of the designee and authorization that the hold may be picked up by a designee.
- Procedures are agreed upon by the patron and the library and detailed in an alert in the patron's account. For example, the designee must present the patron's card to pick up the held item. The designee may not check out any materials other than the held item on the patron's card. Patrons authorizing a designee to pick up an item are responsible for all items checked out by the designee.

Holdable and Unholdable Status

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

Holdable: Available; Checked Out; Claims Returned; Damaged; In Process; In Transit; On Hold Shelf; On Order; and Reshelving

Not Holdable: Bindery; Cataloging; Discard/Weed; ILL; Long Overdue; Reserves; Temporarily Unavailable

Member Library Support and Communication

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

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

*Modified by the Evergreen Indiana Circulation Committee on: **December 13, 2012.***

*Adopted by the Evergreen Indiana Executive Committee on: **December 14, 2012***

APPENDIX A	Patron User Group Matrix (shows limits, expiration periods, etc.)
APPENDIX B	Instructions for Merging Patron Records
APPENDIX C	Example of Inventory List

APPENDIX A
Patron User Group Matrix

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

User	Term	Max Items Out: General dvd/ videos/ gaming software/ art	Fine Limit	Overdue Limit	Notes
Staff Card	2 years	100/10/10/1/6	\$10.00	15	Exempt from daily overdue fines.

APPENDIX B
Request for Patron Record Merge

The Evergreen Helpdesk does not accept individual requests for patron merges. Patron merge requests should be sent to the Evergreen Helpdesk weekly using the Patron Merge Request Form. **Please attach the form to the helpdesk ticket.**

Merge requests will be processed once a week each Monday. Merges submitted by 11:59 p.m., Sunday, will be processed on the following Monday. Requests received after such time will be processed the following week.

Since the helpdesk does not allow for attachments, please email the spreadsheet to Mike Peters at mrpeters@library.in.gov.

Use the following subject line exactly as follows. The email account will be set to filter the merge requests and if the subject line is incorrect, the request will not get picked up.

The following format is required for the subject line:

_____ SHORTNAME - Patron Merge Request - MM/DD/YYYY
 _____ Ex: ISLI - Patron Merge Request - 08/24/2009

If multiple libraries are involved, be sure to include the necessary authorization on the spreadsheet (staff name and email).

APPENDIX C
Example of a Transit Inventory

Owning Library Confirmation Upon Transit

Date: November 20, 2010

Owning Library Name: Best Library

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

Item Barcode: 3 5555 89899 0001

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

Receiving Library Confirmation Upon Receipt

Date: November 22, 2010

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

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

Item Barcode: 3 5555 89899 0001

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

Receiving Library Confirmation Upon Patron Return

Date: December 12, 2010

Owning Library Name: Best Library

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

Item Barcode: 3 5555 89899 0001

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

Receiving Library Confirmation at Transit Back to Owning Library

Date: December 13, 2010

Owning Library Name: Best Library

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

Item Barcode: 3 5555 89899 0001

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

Owning Library Confirmation Upon Return Receipt

Date: December 18, 2010

Owning Library Name: Best Library

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

Item Barcode: 3 5555 89899 0001

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