



# BLACK GOLD

COOPERATIVE LIBRARY SYSTEM

580 Camino Mercado  
Arroyo Grande, CA 93420  
805 543 6082  
[Blackgold.org](http://Blackgold.org)

**AUTOMATION AND TECHNICAL SERVICES  
(ATS) OPERATIONS COMMITTEE AGENDA  
Wednesday, November 2, 2022– 10:00 a.m.  
Goleta Valley Library – Multipurpose Room**

\* Item accompanies the agenda

- 1) **10:00 A.M. CALL TO ORDER** Glynis Fitzgerald, Chair, Presiding Recorder; Kristina Uvalle (BG)
- 2) **ADOPT AGENDA** —
- 3) **\*APPROVE MINUTES** — October 5, 2022, by Kristina Uvalle (BG)
- 4) **CIRCULATION** –
  - a) Circ Manual review (TIME LIMIT: 90 minutes)
    - i) Review and Approve 'Red' edits
    - ii) Discuss 'Green' notes/decide whether to include or omit sections
    - iii) Discuss possible additions to circ manual to reflect change to Koha/Aspen model
- 5) **BLACK GOLD UPDATE**
- 6) **ROUNDTABLE**
- 7) **ITEMS TO BE FORWARDED** — (To Council or other committees)
- 8) **AGENDA BUILDING**
- 9) **NEXT MEETING** — 10:00 a.m., Wednesday, January 4, 2023 (Webinar)
- 10) **ADJOURNMENT**

Distribution — email notice of web-posted agenda packet (available at [www.ats.blackgold.org](http://www.ats.blackgold.org)): Karen Christiansen, PR; Selena Fierro, SM; Joanne Britton SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Carla Mason, GO; Eric Castro, CC; Justin Formanek, SP; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];



**AUTOMATION AND TECHNICAL SERVICES  
(ATS) OPERATIONS COMMITTEE MINUTES  
Wednesday, October 5, 2022– 10:00 a.m.  
WEBINAR**

Attending: Karen Christiansen, PR; Selena Fierro, SM; Dominic Keen, LM; Carla Mason, GO; Justin Formanek, SP; Matt Duhon, ATS; Kristina Uvalle, BG.

**1) 10:08 A.M. CALL TO ORDER** Matt Duhon, Vice Chair Presiding  
Recorder; Kristina Uvalle (BG)

**2) ADOPT AGENDA** — 1<sup>st</sup> KC 2<sup>nd</sup> SF. Approved.

**3) \*APPROVE MINUTES** — September 7, 2022, by Kristina Uvalle (BG). 1<sup>st</sup> SF/ 2<sup>nd</sup> CM. Approved.

**4) CIRCULATION** –

a) Circ Manual update – Still waiting on updates from a couple of libraries. The November ATS meeting will focus on the circ manual and updating it to reflect the change to Koha.

**5) ILL** –

a) \*Previous Barcode Issue (PR) - Determine if the field Previous Barcode can be made inactive. If not, determine if and where we want this info to display.

Committee agreed to see if it is possible add a “P” to the barcode and run a report of previous barcodes to determine the number of barcodes that needed to be updated.

b) \*Non-Black Gold Library Card Expiration (PR) - Discuss and select criteria for eliminating “download only” patrons residing outside BG service areas and recommend this process to Council for approval.

SF (SM) reported that they emailed PACREG patrons to inform them the card was going away, and patrons would have to re-register. She finds that purging every 6 months helps keep numbers under control.

It was recommended that a regularly scheduled purge helps to eliminate older ecard patrons. For zip codes outside the service area, deletion after a year with no physical checkouts. Libraries are encouraged to keep patrons informed of expiring cards.

c) \*Quipu Age Limits (SM) - Eliminate the age requirement or adjust the Quipu application to allow parents to apply for their child.

SF (SM) is looking for ways to be compliant with Senate Bill 1383 that requires the use of 30% recycled paper by eliminating the need for a paper application. KC (PR) reported that Paso uses 30% recycled paper and requires its use through their local printer.

BG reported that Quipu can be set by jurisdiction, so libraries can determine the age requirement independently.

**6) BLACK GOLD UPDATE**

MD (BG) reported on attending the Cenic Conference. San Diego and Sacramento Libraries presented. San Diego reported having 7000 hotspots with Chromebooks as part of pilot program with a year checkout. Sacramento reported moving their servers to a data center after their main building got flooded and damaged their servers and network. The Getty Museum gave a presentation on setting up virtual tours for patrons.

KU (BG) reminded libraries that the Network Device Survey is due November 4<sup>th</sup>. The Circ Manual will be the focus of the November meeting. Delivery to SLO and SB will be scheduled monthly to the end of the year. Libraries were reminded to update their holiday calendars if any changes have

been made since the beginning of the year. Changes must be made first in Koha and then in Aspen. Contact Kristina if you need help or would like BG to make the changes for you.

**7) ROUNDTABLE – N/A**

**8) ITEMS TO BE FORWARDED** — RAS Committee to discuss and provide instructions for the Overdrive Advantage Plus program.

**9) AGENDA BUILDING – N/A**

**10) NEXT MEETING** — 10:00 a.m., Wednesday, November 2, 2022 (Goleta)

**11) ADJOURNMENT** at 11:24 a.m. 1<sup>st</sup> JF/2<sup>nd</sup> CM. Approved.

Distribution — email notice of web-posted agenda packet (available at [www.ats.blackgold.org](http://www.ats.blackgold.org)): Karen Christiansen, PR; Selena Fierro, SM; Joanne Britton SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Carla Mason, GO; Eric Castro, CC; Justin Formanek, SP; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];

BLACK GOLD COOPERATIVE LIBRARY SYSTEM

# CIRCULATION AND INTERLIBRARY LOAN MANUAL

## October 27, 2021

Automation and Technical Services Operations Committee approved on August 4, 2021

Approved by Black Gold Administrative Council on October 15, 2021.

Updates made after October 2021 in Red

Later additions:

Most loans covered in this manual are between Black Gold member libraries.  
Loans and rules to non-Black Gold libraries are at the discretion of each library jurisdiction.

Distribution: Karen Christiansen, PR; Selena Fierro, Joanne Britton, SM; Sarah Bleyl, LM; **Carla Mason, GO**; **Eric Castro, CC**; Justin Formanek, Nancy Duenas, SP; Glynis Fitzgerald, Matt Duhon & ~~Kimberly Hunter~~, BG; Library Directors: PR, SM, LM, SP, **CC**

## Table of Contents

PURPOSE.....	4
INTRODUCTION.....	4
NOTIFICATIONS.....	4
AUTOMATED TELEPHONE SYSTEM .....	5
EMAIL .....	5
TEXT MESSAGE .....	5
OVERDUE NOTIFICATION .....	5
OVERDUE NOTIFICATION (non-Black Gold libraries).....	5
PAPER NOTIFICATION.....	5
RENEWALS .....	5
AUTO RENEW .....	5
TELEPHONE .....	6
ONLINE.....	6
PATRON INFORMATION .....	6
INPUT STANDARDS PATRON REGISTRATION.....	6
BARCODE .....	6
SCANNER – PATRON ENTRY.....	6
LAST NAME.....	7
FIRST NAME .....	8
MIDDLE NAME .....	8
TITLE/SUFFIX.....	8
REGISTERED AT .....	9
PATRON CODE.....	8
ADDRESS.....	9
TELEPHONE/EMAIL, ETC. ....	9
PHONE FIELD ENTRY GUIDELINES .....	10
TELEPHONE INPUT STANDARDS FORMAT.....	11
GENDER.....	11
STATISTICAL CLASS.....	11
PASSWORD .....	11
LANGUAGE .....	12
FORMER BARCODE .....	12
BIRTHDATE.....	12
UNIQUE ID .....	12
GUARDIAN .....	12
DATA ENTRY .....	12
STANDARDS FOR PATRON NOTES IN <b>POLARIS-Koha</b> .....	12
PATRON REGISTRATION REQUIREMENTS.....	12
BEST PRACTICE FOR LIBRARY CLOSURE.....	13
LIBRARY CARDS .....	13
ONLINE REGISTRATION .....	13
CARD EXPIRATION .....	14
REPLACEMENT LIBRARY CARDS.....	14
LENDING MATERIALS.....	14
CIRCULATING MATERIALS.....	14
	2

NON-CIRCULATING MATERIALS.....	14
HOLDS.....	15
HOLD LIMITS.....	15
HOLDABLE/NONHOLDABLE PARITY .....	15
HOLDS (ILL) .....	15
UNCLAIMED HOLD ITEMS .....	15
RENEWAL LIMITS.....	16
MATERIAL TYPES LENGTH OF LOAN PERIODS BY MATERIAL TYPE .....	17
PAPERBACK.....	18
OVERRIDING DUE DATES FOR STAFF/OTHERS .....	18
EXCEPTIONS TO OVERRIDES.....	18
MAXIMUM NUMBER OF EACH MATERIAL TYPE .....	18
MAXIMUM NUMBER OF ITEMS BY PATRON TYPE .....	19
FEEES AND FINES.....	20
SPECIFIC AGENCIES' REPLACEMENT COSTS FOR LOST ITEMS.....	20
REPLACEMENT COSTS FOR MATERIAL USED BY SINGLE AGENCY.....	21
BLACK GOLD OVERDUE FINES .....	22
FINE LIMITS ON SERVICE .....	23
BLACK GOLD FEES AND CHARGES.....	23
CHECK-IN.....	23
UNIFORM CHECK-IN PROCEDURES.....	23
RFID.....	24
IN TRANSIT .....	24
LOST MATERIALS.....	24
REFUNDS FOR LOST AND PAID ITEMS .....	24
WAIVING FEES FOR LOST OR DAMAGED ITEMS .....	24
Lost/Missing Items Contacts .....	25
HOTSPOT: SUSPEND/ACTIVATE .....	25
BEST PRACTICES FOR DAMAGED/INCOMPLETE ITEMS.....	26
CLAIMS.....	27
CLAIM RETURNED .....	27
NUMBER OF CLAIM RETURNED ALLOWED .....	28
COLLECTION POLICIES.....	28
LIBRARY JURISDICTION CODES .....	28
ATS LIBRARY JURISDICTION AND BRANCH CODES.....	29
DELIVERY .....	29
BLACK GOLD DELIVERY.....	29
MISC .....	30
LIBRARY HOURS.....	30
INTERLIBRARY LOAN CONTACTS.....	30
LIBRARY FAX NUMBERS .....	30
GLOSSARY .....	30
STATISTICS .....	31
APPENDIX.....	31
NOTICE TEXT .....	31
TYPICAL NOTICE AND BILLING CYCLE – POLARIS .....	34
COLLECTION CYCLE – POLARIS.....	35

## PURPOSE

To serve as a written statement of agreements on circulation and interlibrary loan policies and guidelines of the members of the Black Gold Cooperative Library System. The manual also functions as a compendium of local library circulation and interlibrary loan policies. It is a goal to have and follow uniform policy whenever possible for patron convenience.

## INTRODUCTION

Black Gold Cooperative Library System circulation and interlibrary loan policies and procedures serve as reference for staff members in the Black Gold Cooperative Library System. The manual includes information on patron registration standards, lending materials, renewals, loan periods and notifications, fees and fines, check-in procedures, etc. for each of the member libraries.

An automated circulation system is utilized by Black Gold member libraries to facilitate loaning of materials between jurisdictions. The ~~seven~~ **six** members share the **Polaris Koha** automated circulation system and are also known as the Automation and Technical Services (ATS) libraries. ATS libraries can lend and borrow from each other using the “holds” feature provided by the automated circulation system.

Holds are placed into the computer at any point in the system, and any point in the system can be designated as the pick-up point. Held books are trapped automatically by the computer and routed to the selected pick-up point.

~~In addition, Black Gold permits holds to be placed through the Web OPAC. The URL for the shared OPAC is [www.blackgold.org](http://www.blackgold.org).~~ In addition, each Library Jurisdiction has a customizable homepage through Aspen that allows patrons to view items specific to their home library as well as what is available from other libraries in the Cooperative. The Black Gold office in ~~Grever Beach~~ **Arroyo Grande** supports the automated system for its users.

NOTE: Do we need to list URLs for each jurisdiction?

### Members of the Black Gold Cooperative Library System:

Blanchard/Santa Paula Public Library	<b>Carpinteria Community Library</b>
Goleta Valley Library	Lompoc Public Library
Santa Maria Public Library	Paso Robles City Library

## NOTIFICATIONS

(See Appendix for more information and notice text).

To ensure items move to 'Lost' on a patron record, patrons MUST have a notification option (other than print) to receive overdue and fine notices. Please see 'patron entry standards' for more information.

Patrons have several options for notifications.

### **AUTOMATED TELEPHONE SYSTEM**

1. Notifies patrons of available holds and overdues.

### **EMAIL**

2. If there is an email address, and an option to receive email is selected in the patron record, the patron will receive holds and overdue notification via email.

### **TEXT MESSAGE**

3. Patrons may also select to receive text messages as a notice delivery option, or in addition to email and telephone notices.

### **OVERDUE NOTIFICATION**

As of January 3, 2011, overdue notices are available by telephone or email/text message only.

### **OVERDUE NOTIFICATION (non-Black Gold libraries)**

Overdue notices to non-Black Gold libraries will be sent by the lending library to the patron in conformance with its internal policy, usually within 5 days after the due date.

### **PAPER NOTIFICATION**

Bills for lost items and fine notices are always in paper format.

### **RENEWALS**

#### **AUTO RENEW**

If items can be renewed (renewals available and no holds) they will automatically be renewed by **Polaris Koha** with an email notification going to the patron. Auto-renewals are done at the same time the reminder notices are sent out.

**NOTE:** Do we need to include that some itypes are not renewable or renewable only be phone request?



Renewals of checked out items may be done by:

## TELEPHONE

1. Telephone (iTiva) — the toll-free number is (800) 354-9660. Patrons can also reach the system by dialing (805) 546-0499. iTiva follows the standard renewal rules set up on the **Polaris Koha** system.

## ONLINE

2. Access is provided at [www.blackgold.org](http://www.blackgold.org).

Overdue items may be renewed online following standard renewal rules.

*NOTE: Items cannot be renewed until 2 days before the item's due date*

*NOTE: other URLs?*

## PATRON INFORMATION

### INPUT STANDARDS PATRON REGISTRATION

1. When a patron applies for a library card, check for a pre-existing patron account using the following methods in this order:
  - a. Search by name using the patron's last name, comma and first three letters of the first name (~~using \* as a wildcard can help yield results~~). Confirm results using date of birth.
 

*Note: Tested in Koha, \* no longer changes search results.*
  - b. Search using **privacy-protected format** of driver's license number. ~~Note: If a patron used a passport or other ID to obtain a library card their record will not be found.~~ Confirm results using date of birth.
 

*Note: Full driver's license no longer pulls up patron account; must enter license number with privacy format included (i.e. AXXX1234). Koha will search other IDs so long as the format includes the privacy format.*
  - c. Search using patron's date of birth.

## BARCODE

New patrons – scan account number from library card.

Existing patrons – If a pre-existing account for a patron is located do not assign a new barcode. See "Replacement Library Cards".

## REPLACEMENT LIBRARY CARDS

No agency charges replacement fees for normal wear and tear or for name changes. Some agencies may charge for a replacement card if the patron has lost or misplaced a card. An ID is required to replace a library card.

If a patron is currently registered at your library and wishes to have the card replaced, assign a new barcode. **Barcode prefix and registered library should match. Needed?**

If a patron is not currently registered at your library and wishes to have the card replaced, confirm the patron wants to change their registered library. **If necessary, update all fields and add new barcode.**

1. If the patron wishes to change libraries – assign a new barcode and change the registered library. The barcode prefix and library should match. Online digital accounts may also need to be updated **or deleted**.
2. If the patron does not wish to change libraries – follow best practices at your location to allow checkout and have the patron follow up at their registered library to obtain a new card.

The patron's previous barcode should be noted in the **Former Previous** Barcode field. This allows staff to verify the previous barcode when troubleshooting e material issues (Overdrive, Hoopla, etc.).

**NOTE:** Do we need to add something about SLO and SB patrons?

## SCANNER – PATRON ENTRY

As of ~~Polaris 4.1R2 Koha 21.11.05.000~~ A patron can be registered by scanning a driver's license. All information in the patron record is entered with ALL Caps in this instance. You do not need to change the entry to standards as below (re. Capitalization of first letter only). Please confirm the information on the license is correct.

**NOTE:** Is this the same in Koha? License scanners not set up at GO to test.

**NOTE:** add something about the need for a proper scanner?

## LAST NAME

Legal last name printed on identification. First letter capitalized. Names with punctuation or spaces should be entered exactly as seen on the ID.

**NOTE:** Rearrange to reflect order in KOHA. Add Preferred name info.

RULE	EXAMPLE
Enter exactly as spelled on the ID, omitting diacritical marks.	ID: Laurence Quarri <b>Last name:</b> Quarri

<p>If the last name consists of more than one name, enter all parts in the Last name field exactly as ID has it printed.</p>	<p>ID: John Van Duzer <b>Last name:</b> Van Duzer</p> <p>ID: James Madison-Park <b>Last name:</b> Madison-Park</p> <p>ID: Roberto Gonzales Chavez <b>Last Name:</b> Chavez</p> <p>ID: Toby O'Connor <b>Last name:</b> O'Connor</p>
<p>If "Jr" or any other addition appears as a part of the last name, enter it in the <b>Suffix</b> field.</p>	<p>ID: Eli Jackson Jr <b>Last name:</b> Jackson</p> <p>ID: John Jones III <b>Last name:</b> Jones</p>

### FIRST NAME

Legal first name printed on identification (do not use nickname or abbreviations). First letter capitalized.

**NOTE:** add 'Legal name if different' or 'preferred name'?

RULE	EXAMPLE
Enter exactly as spelled on ID.	ID: Tommy Smith <b>First name:</b> Tommy
If the first name is hyphenated, enter both names in the First name field exactly as printed on ID.	ID: Mary-Jane Jones <b>First name:</b> Mary-Jane  ID: Jean-Pierre Smith <b>First name:</b> Jean-Pierre

### MIDDLE NAME

Middle name (initial if full name unavailable) **Enter in Initials field of patron registration**

RULE	EXAMPLE
Enter the whole middle name as spelled	ID: John Quincy Adams <b>Middle name:</b> Quincy
If only a middle initial is available, enter that in the <b>Middle name</b> field. Do <b>not</b> type a period.	ID: Lou Q. Stewart <b>Middle name:</b> Q
If more than one middle name is given, enter them all.	ID: John Francis Xavier Smith <b>Middle name:</b> Francis Xavier

### TITLE/SUFFIX

~~Use as appropriate~~

RULE	EXAMPLE
<p>Use the following suffixes: Jr, Sr, II, III, 2<sup>nd</sup>, 3<sup>rd</sup></p> <p>Do not use any honorary degree designations (Esq, PhD, etc.)</p>	

### REGISTERED AT LIBRARY

New patrons – automatically set in patron registration wordform using the library location where the card is being created (barcode prefix matches branch).

Existing patrons – If a patron has moved or wishes to change their registered library the registered library should match the barcode prefix so the card may need to be replaced. See “Replacement Library Cards” to allow checkout.

### PATRON CODE

Select the appropriate patron type. Not all jurisdictions use the same codes. The following are examples only:

Adult, Teen, Juvenile, Internet Only (also, add “Internet Only” block to account) Is this still correct?

### ADDRESS

A valid home address is required for all patrons except for “internet only.” Add ‘Welcome’?

State law requires that patrons receive written notices before being sent to collections. **It is imperative we have a valid address.**

~~To add a new address, select “Add” button. To add an address, use Main Address field (or Alternate Address if adding multiple addresses). If entering a second address, list the mailing or local address in the Main Address section.~~

Enter zip code; select city.

~~If entering two or more addresses identify the mailing address or local address as “Primary.” If entering only one address, leave “Home” as the address type (the default).~~

For “internet only” patrons, enter “internet only” in the address field and add the library’s zip code.

RULE	EXAMPLE
<p>Enter street address and apartment number (if applicable), or PO box number.</p> <p>Do not enter any periods. Still correct?</p> <p>Use the following abbreviations:</p>	<p><b>Address:</b> 15 Main St</p> <p><b>Address:</b> 123 W 45 St Apt 67</p> <p><b>Address:</b> 89 Grand Ave Ste 10</p>

Apartment Avenue Boulevard Building Circle Highway Lane Place Road Room Street Suite	Apt Ave Blvd Bldg Cir Hwy Ln Pl Rd Rm St Ste	<b>Address:</b> PO Box 333
If a street address includes a compass direction, use N, S, E, W, NE, NW, SE, or SW		<b>Address:</b> W Main St Apt 4B
If a street name is a numbered street, use the cardinal number only, (without the “-st”, “-nd”, “-rd”, “-th”)		<b>Address:</b> 1200 Parks Ave NW <b>Address:</b> 13 E 67 St

### TELEPHONE/EMAIL, ETC.

Enter as appropriate. Set notification option according to patron's choice.

RULE	EXAMPLE
Enter the number in the Phone 1 field. If a second number has been provided, enter it in the Phone 2 field.	Telephone #: 805-777-7777

### PHONE FIELD ENTRY GUIDELINES

“Voice phone 1” is a mandatory field in the current automated system. For patrons who do not have a telephone, or refuse to give a telephone number, as of November 17, 2010, the agreed upon standard for this field on the patron registration screen is “none” or “refused” (no note in the patron record).

*Note: Phone and email are not required fields in Koha patron registration form.  
Change ‘Voice phone 1’ to ‘Primary phone’*

~~Note: As of September 5, 2018, if the system web application (LEAP) is used to register a patron, and the patron refuses to provide a phone number, please leave the phone number field blank and insert a ‘non-blocking note’ in the patron record using standard note format indicating the patron refused to provide a phone number.~~

If a patron refuses to give either an email address or a telephone number, the staff member should put an agreed upon staff email address in the email field. *Note: Is this still standard practice?* Failure to do so will result in a patron account with fees/fines over \$40 going to Collections without any prior notice, or not going to Collections at all if

the notice cycle cannot begin/complete. Email or telephone notification is required for the notice cycle to begin. Telephone overdue/hold notices that are not completed (answered) will roll to print.

## TELEPHONE INPUT STANDARDS FORMAT

The acceptable format for telephone numbers for automated calling is: AAA-PPP-NNNN. "AAA" is area code, "PPP" is prefix, "NNNN" is number.

NOTE: Is this still true?

Some general rules:

- Format applies to all telephone fields in the record.
- Only one telephone number per field (not "PPP-NNNN or PPP-NNNN" in the same line)
- The iTiva system can only call a direct number. If the phone number contains any of the following, it cannot be used:
  - An extension number
  - A work number that needs to go through a switchboard
  - A call blocking service access number such as \*82
- Words in the telephone number are acceptable as the iTiva system ignores them. Examples: parents' home, work, cell.
- **Do not enter any symbols such as # or \*.**
- Do not use a contiguous set of numbers such as 1111111 or 999. This could result in the automated system dialing 9-1-1 as it uses dialing formats to reach outside lines.

## GENDER

~~The default is N/A and should not be changed.~~

## STATISTICAL CLASS

~~Enter the 4-digit resident/non-resident code if patron resides outside of the default region. For example, 1656 is automatically set for the Lompoc Public Library System. This code is used for statistical purposes.~~

NOTE: Not used

## PASSWORD

~~Passwords will vary by jurisdiction.~~ Will default overnight to last four digits of phone number if nothing is entered.

*Note: Do we have a standard Black Gold password format – the last four digits of the patron's phone number on file?*

## LANGUAGE

~~If the patron has chosen to receive account information in Spanish, change the language field to Spanish. This will allow the patron to receive notifications in Spanish as well.~~

*Note: Language option not included in Koha.*

## FORMER PREVIOUS BARCODE

If the patron is replacing their card rather than creating a new account, copy and paste the former account number into this field.

## BIRTHDATE-DATE OF BIRTH

### PARENT/GUARDIAN

Only use for Juvenile or Teen cards. Input information in **Unique** ID field using the same parameters listed above. Optionally a P/ may be added (meaning parent) before type of identification, i.e., N6579760 P/CDL, N6579760 P/CID, 495950628 P/MLD, etc. Enter first name first, middle initial or name, and last name last: **Mary Jane Patron**

## DATA ENTRY-STAFF INITIALS

Use your library's 2-letter code as used in ~~Polaris Koha~~ and a forward slash and your initials: **LM/ss**

## STANDARDS FOR PATRON NOTES IN ~~POLARIS~~ Koha

Select the appropriate type of note to deliver the message to patron and/or staff.

- All notes should be brief and include only pertinent facts.
- All free-text notes should include date first, then Branch/staff initials. *Is this still necessary?*
- In Patron Status Notes put most recent note at the top, date first, then Branch/staff initials.

If notes field is full, refer to supervisor for review.

*Note: Does the notes field in Koha have a limit like Polaris did?*

## PATRON REGISTRATION REQUIREMENTS

A jurisdiction should only change another library's patron codes if the individual has moved to that jurisdiction.

TYPE	SP	LM	PR	SM <sup>2</sup>	GV	CC
Adult	ID & proof of address	ID & proof of address	ID & proof of address	ID & proof of address	see below <sup>1</sup>	See below 1
Group	n/a	n/a	n/a	n/a	see	n/a

Cards					below <sup>1</sup>	
Juvenile	parent ID & proof of address	parent ID	parent ID	parent ID & proof of address	see below <sup>1</sup>	See below 1
Welcome	n/a	n/a	ID	ID	see below <sup>1</sup>	n/a
Teen	parent ID & signature N/A	n/a	parent ID	n/a	Age 13-17 issued w/out ID	Ages 13-17 issued w/out ID
Internet Only			n/a		Age 18 & up issued w/out ID	Ages 18 & up issued w/out ID
<p><sup>1</sup> GO will issue a card with government-issued ID with photo and proof of address. If there is no proof of address the patron will be asked to write the address on a preprinted confirmation postcard which will be mailed. The subsequent presentation of this card with its postmark shall constitute proof of address. GO issue cards to institutions with proper institutional ID and with individual associated with institution accepting personal responsibility.</p> <p><sup>2</sup> SM will mail cards to patrons who have no other way to verify their mailing address. Patron is allowed to check out 2 items before card is mailed.</p>						

## BEST PRACTICE FOR LIBRARY CLOSURE

- Notification to member libraries – Optimal is at least 3 weeks.
- Holds processing – If library is closed for 3 weeks or fewer, holds processing remains the same.
- Hold Pickup Point – Remove at library's discretion.
- PAC – If library is closed fewer than 3 weeks, items will not be removed from the catalog

NOTE: Relocate in circ manual. Holds section?

## LIBRARY CARDS

It is a common practice to issue library cards to individuals only, with the exception of ILL institutions.

Lompoc issues cards to the prison. The prison gets a higher checkout limit, and the hold fee is waived.

In October 2020, the Administrative Council voted that juvenile or teen patrons 'aging up' to adult cards should have existing fines and fees removed from their account.

## ONLINE REGISTRATION

Patrons may register online and receive a temporary barcode starting with the library prefix and then an 'E' (example 22138E). Libraries are assigned based on zip code designations through a 3rd party vendor that does an address verification. "E" cardholder registration expiration varies by jurisdiction. These cardholders may place



holds and use online services such as Overdrive. Online registrations should be deleted if there is no activity on the account for more than ~~six months~~ **one year**.

## **CARD EXPIRATION**

On March 23, 2013, the Administrative Council voted to set Card Expiration to 99 years. Address Check is determined by jurisdiction.

## **LENDING MATERIALS**

### **CIRCULATING MATERIALS**

Black Gold member libraries make their circulating books available to each other's respective patrons. Requests for individual items are on a "prefer my patron" basis and are processed in accordance with the procedures of the lending library.

Renewal of loan items may be possible.

Two exceptions to standard loan practices are Rental Collections (materials which patrons pay to use) and Express Collections (copies of high demand titles with no additional charge). These items can only be checked out from and returned to the owning jurisdiction; they are not holdable throughout Black Gold.

*Note: Do any jurisdictions still provide Rental and Express Collections?*

Book Club Kits are holdable and are reserved on the PAC. Library branches adding or removing kits should notify the Black Gold System Cataloger so that book club specific fields and supplemental materials may be added to the record. Library should indicate if they will provide supplementary materials or if Black Gold staff should locate generic discussion questions. *Still needed?*

## **NON-CIRCULATING MATERIALS INCLUDING REFERENCE, SPECIAL COLLECTIONS AND MICROFORMS**

The loan of reference and special collections items is subject to the lending library's consent, based on considerations such as demand, rarity, and the condition of the requested material. The loan period is determined by the lending library. It is assumed that the items are restricted to use within the receiving library unless special permission to circulation has been granted separately.

## HOLDS

### HOLD LIMITS

Effective July 1, 2014, the Administrative Council approved a limit of 10 holds at a time. Patrons will receive a block message if they attempt to place more than that. As of November 2016, only one hotspot may be placed on hold. For the following patron types the hold limit per account is: Institution = 99, Library = 30, Elementary = 5.

*Note: This varies by jurisdiction.*

Held items will be on the hold shelf for ~~7~~ 10 days.

Effective May 2016, the Administrative Council approved holds placement over the PAC for 'Book Club Kits'. Patrons may place a hold on another jurisdiction's book club kit and pick it up at a library of their choice. Library of Things holds are determined at the jurisdictional level but should not exceed the maximum hold limit of 10.

*Note: Patrons are allowed to borrow 3 LOT items at a time at GO. Does this vary by jurisdiction?*

### HOLDABLE/NONHOLDABLE PARITY

On July 27, 2012, the Administrative Council approved a change to the holdable/nonholdable parity policy: within each jurisdiction, the threshold will be parity between holdable and non-holdable (rental and express) copies.

*NOTE: Do we still have these?*

### HOLDS (ILL)

Each library participating in reciprocal borrowing within the Black Gold system agrees to process holds in a timely manner by exercising the hold mechanism in the automated circulation system at least every open day.

### UNCLAIMED HOLD ITEMS

Unclaimed report should be run every day in order to transfer items to the next patron. If an item has a status of "Unclaimed" but is not found, wait for 1 month from the unclaimed date and contact the owning library for a shelf check. If it is not located, the item's status should be changed to "Missing" by the owning library.

*Note: The "unclaimed report" in Polaris is now the "Holds waiting over 10 days" tab in Koha. The tab is located in the Circulation module under "Holds awaiting pickup." The patron is also contacted to determine if they have the item.*

## Claimed & Missing from Holdshelf Contacts

JURISDICTION	BRANCH	CONTACT	EMAIL ADDRESS	PHONE NUMBER
Goleta	GO	Marie Crusinberry	<a href="mailto:mcrusinberry@cityofgoleta.org">mcrusinberry@cityofgoleta.org</a>	805.964.7878
Carpinteria	CC	Eric Castro	<a href="mailto:eric@carpinteriaca.gov">eric@carpinteriaca.gov</a>	805.684.4314
Lompoc	LM	Dominic Keen	<a href="mailto:D_keen@ci.lompoc.ca.us">D_keen@ci.lompoc.ca.us</a>	805.875.8782
	LV	Sarah Starbuck	<a href="mailto:S_starbuck@ci.lompc.ca.us">S_starbuck@ci.lompc.ca.us</a>	805.733.3323
Paso Robles	PR	Don Rader	<a href="mailto:drader@prcity.com">drader@prcity.com</a>	805.237.3871
Santa Maria	MM	Selena Fierro	<a href="mailto:sfierro@cityofsantamaria.org">sfierro@cityofsantamaria.org</a>	925.0951 x514
Santa Paula	SP	Nancy Duenas	<a href="mailto:nancy.duenas@blanchardlibrary.org">nancy.duenas@blanchardlibrary.org</a>	525.3615 x <del>101</del> -102

## RENEWAL LIMITS

On January 27, 2012, the Administrative Council iterated that regardless of fines, patrons should be allowed to renew items.

By common agreement, items may only be renewed according to the owning library's policies. All member libraries allow renewals on most materials except items on hold.

On March 1, 2018, Administrative Council approved increasing the renewal limit to 5 renewals on eligible items.

TYPE	SP	LM <sup>3</sup>	PR	SM	GV	CC
Audio*	5	5	5	5	5	5
Blu-ray/Blu-ray Set	5	5	5	5	5	n/a
Books	5	5	5	5	5	5
Book Club Kit	0	0	0	0	0	0
DVD/DVDSET	5	5	5	5	5	5
Encyclopedia	5	5	5	5	5	5
Hotspots <sup>2</sup>	0	0	0	0	0	0
ILL – ATS	1	1	1	1	1	1
ILL – out of system	contact original library	contact original library	contact original library	contact original library	contact original library	Contact original library
Library of Things	0	0	0	0	0	0

Periodicals	5	n/a	5	no	5	5
Read Along	5	5	5	5	5	5
Reference/ Special Loans	case by case	case by case	case by case	no	Case by case	Case by case
Laptops	n/a	n/a	<del>n/a</del> -0	no	n/a	n/a
Videos	5	n/a	<del>5</del> -n/a	n/a	n/a	n/a
<p>*Audio includes CDs (music), Books on Tape, Cassettes, Books on CD, Read Along  <sup>2</sup> Device suspension for overdue device branch determined. Contact Black Gold to suspend service for device.  <sup>3</sup>Lompoc Bookmobile items have a renewal of 1.</p>						

## MATERIAL TYPES LENGTH OF LOAN PERIODS BY MATERIAL TYPE

The loan period for most materials is 21 days <sup>1</sup>. Current loan periods (given in number of days) appear in this table according to item type.

TYPE	SP	LM	PR	SM	GV	CC
Audio*	21	21	21	21	21	21
Book	21	21	21	21	21	21
Book Club Kit	n/a	42	42	42	42	42
Connectivity Kit	21					
DVD/Blu-ray	21	21	21	21	21	21
DVDSET/Blu-ray Set (3+ playing surfaces not incl. bonus discs)	21	21	21	21	21	21
Express (Book, Music, DVD)	n/a	n/a	n/a	n/a	n/a	n/a
Hotspots <sup>2</sup>	7	7	7	7	7	7
Laptop	In-house	n/a	7	7	2 hours in-house	2 hours in-house
Library of Things	<del>n/a</del> 21	n/a	n/a	21	21	21
Passes						
Playaway						
Periodicals	7	n/a	21	21	21	21
Reference/Special Loans	0 or 7	case by case	case by case	case by case	Case by case	Case by case
Rental Book	21	7	n/a	n/a	n/a	n/a
Rental DVD	n/a	3 movies/ 7 series	n/a	n/a	n/a	n/a
Special Loan						
Tablet						
Uncataloged Paperback	no limit	n/a	n/a	21	No limit	No limit
Video Cassette	21	n/a	n/a	n/a	n/a	n/a
*Audio includes Book on CD, Book on Tape, Cassette, CD						

<sup>2</sup> No loans on “internet only” patron type (all); No loans to “Juvenile – no internet” patron type (PR)

## **PAPERBACK**

The definitions and descriptions of “Paperbacks” vary widely, as do the policies concerning them. Variation not only occurs between library jurisdictions, but sometimes between branches within a jurisdiction. The breadth of the variation makes it difficult to be sure that what one library means by “Paperback” is precisely what any other library means by “Paperback.”

### **A PARTIAL LIST OF TYPES OF PAPERBACKS**

Adult:	Cataloged, Uncataloged (short title entries)
Juvenile:	Cataloged, Uncataloged, Generic
Comic Books	
Fotonovelas	
Spanish	

NOTE: Is this still true?

## **OVERRIDING DUE DATES FOR STAFF/OTHERS**

Library staff members are held to the same loan rules as all other patrons. Library staff may not use the Renewal Override, Set Due Date, or any other Polaris Koha function to extend due dates for items checked out to self, other staff members, or the general public without noted approval by a supervisor. Black Gold will periodically run reports listing occurrences of these actions and send to library directors. Changing a due date inappropriately may result in disciplinary action.

## **EXCEPTIONS TO OVERRIDES**

NOTE: Move to Holds section?

It is permissible for library staff to override the hold queue only in these two instances:

1. Patron has found the item in the stacks and presents it for checkout.
2. The item is damaged or has missing parts.

Staff should be sure to reactivate the hold request so that the patron remains at the top of the holds queue.

## **MAXIMUM NUMBER OF EACH MATERIAL TYPE ALLOWED OUT PER PATRON**

There is no common practice concerning maximum numbers of items allowed to be checked out. Current maximum limits are listed on the following table. When there is a slash between numbers (i.e., 2/6) the first number refers to the daily limit, the second to the total limit.

TYPE	SP	LM	PR	SM	GV	CC
Total # of All Items	<del>30</del> 50	50	50	50	99	50
Audio Cassettes	<del>6</del> n/a	n/a	50	n/a	n/a	n/a
Blu-ray/Blu-ray Set	10	no limit	50	50	99	n/a
Books on CD	<del>6</del> 10	no limit	50	50	99	50
Books on Tape	<del>6</del> n/a	n/a	50	n/a	n/a	n/a
CDs	<del>6</del> 10	no limit	50	50	99	50
DVD/DVDSET	10	no limit	50	50	99	50
Encyclopedia	<del>2</del> No limit <sup>1</sup>	no limit <sup>1</sup>	50	50	99-n/a	n/a
Hotspots	1	1	1	1	1	1
Library of Things	1	1	1	1	3	3
Pamphlets/Vertical Files	no limit	no limit	50	5	99	3
<b>Passes</b>					1	
Periodicals (same title)	<del>6</del> 10	n/a	50	5A 5J	99	6
Periodicals (total)	<del>6</del> 10	n/a	50	5A 5J	99	6
Videos	<del>4</del> n/a	n/a	50	n/a	n/a	n/a

<sup>1</sup> LM, SP – Encyclopedias that are part of reference do not circulate.

### MAXIMUM NUMBER OF ITEMS BY PATRON TYPE ALLOWED OUT PER PATRON (TOTAL)

(This does not supersede limits on the number of types of items.)

TYPE	SP	LM	PR	SM	GV	CC
Adult	<del>30</del> 50	50	50	5	99	50
Juvenile	<del>4*</del> 50	50	50	5	99	50
Student			5			
Welcome	n/a	n/a	5	5	5n/a	n/a
Teen	<del>4*</del> n/a	n/a	50	5	99	5

\*Unless parent approves

## FEES AND FINES

### SPECIFIC AGENCIES' REPLACEMENT COSTS FOR LOST ITEMS

All member libraries charge replacement fees for lost items. Information about replacement costs is available online in the ILS circulation system. Some locations allow patrons to replace the item themselves. \*6 A service fee may be charged.

TYPE	SP <sup>1,4</sup>	LM <sup>2</sup>	PR <sup>2</sup>	SM <sup>1,2,4</sup>	GV	CC
Adult Fiction	35.00	30.00	<del>36.00-37.00</del>	35.00	<del>30.00-35.00</del>	30.00
Adult Non-fiction	40.00	30.00	<del>42.00-43.00</del>	40.00	<del>30.00-40.00</del>	30.00
Audio Cassettes	10.00/ cassette	n/a	n/a	n/a	<del>10.00/cassette-n/a</del>	n/a
Blu-ray <sup>5</sup>	40.00	20.00	n/a	40.00	<del>20.00-25.00</del>	n/a
Blu-ray Set	50.00	30.00	n/a	50.00	<del>30.00-36.00</del>	n/a
Book on CD	10.00/disc	10.00/disc	75.00	50.00	<del>20.00disc/50.00set-51.00</del>	20.00 disc/50.00 set
Book on Tape	10.00/ cassette	n/a	n/a	n/a	<del>10.00/cassette-n/a</del>	10.00/cassette
Compact Discs (music)	30.00	10.00	<del>20.00-n/a</del>	30.00	20.00	20.00
DVD	30.00	20.00/2 or less discs	<del>20.00-35.00</del>	30.00	<del>20.00-25.00</del>	20.00
DVDSET (3+ playing surfaces not incl. bonus discs)	50.00	30.00/ 3+ discs	<del>50.00-35.00</del>	50.00	<del>30.00/disc 36.00</del>	30.00/set
Hotspot Unit <sup>7</sup>	\$100/unit	\$100/unit	\$100/unit	\$100/unit	<del>\$100/unit 103.00</del>	\$100/unit
Hotspot Cord <sup>7</sup>	10.00	10.00	10.00	10.00	10.00	10.00
Hotspot Charger <sup>7</sup>	10.00	10.00	10.00	10.00	10.00	10.00
Hotspot Case <sup>7</sup>	10.00	10.00	10.00	10.00	10.00	10.00
Hotspot SIM Card <sup>7</sup>	10.00	10.00	10.00	10.00	10.00	10.00
Juvenile BKCD			50.00			
Juvenile BK+CD						
Juvenile Blu-ray	30.00	20.00	n/a	30.00	<del>20.00 25.00</del>	n/a
Juvenile	25.00	30.00	<del>28.00</del>	25.00	<del>20.00</del>	20.00

Fiction			29.00		25.00	
Juvenile Non-fiction	25.00	30.00	<del>28.00</del> 29.00	25.00	<del>20.00</del> 25.00	50.00
Laptops	1200.00	n/a	800.00	List price	n/a	n/a
Lease Book Fiction	35.00	n/a	n/a	35.00	n/a	n/a
Lease Book Non-fiction	40.00	n/a	n/a	40.00	n/a	n/a
Library of Things	n/a	n/a	n/a	n/a	<del>150.00</del> <sup>4</sup> Actual Cost	150.00
Pamphlets	n/a	n/a	5.00	3.00	n/a	n/a
Paperbacks Chargeable	10.00	10.00	<del>10.00</del> 15.00	10.00	n/a	n/a
Periodicals	8.00	8.00	<del>8.00</del> -10.00	8.00	8.00	8.00
Read Along/VOX	n/a	n/a	n/a	n/a	n/a	n/a
Reference	60.00	60.00	<del>60.00</del> 43.00	60.00	<del>60.00</del> 62.00	60.00 <sup>1</sup>
Video Cassettes	<del>25.00</del> n/a	n/a	n/a	n/a	n/a	n/a
Juvenile BkCD			50.00			
Juvenile BK + CD			25.00			
Book Club Kit			180.00			

<sup>1</sup> Or list price

<sup>2</sup> Standard practice to not offer refund after 6 months, 3 months for Santa Maria, 3 months for LompoC.

<sup>4</sup> If the entire set of multi-disc items needs to be replaced, then the replacement cost will be charged.

<sup>5</sup> Effective June 4, 2010, the Administrative Council approved a \$40 standard replacement cost for Blu-ray.

<sup>6</sup> Effective March 5, 2016, LompoC will charge a processing fee of \$11 for replacement items brought in by the Patron.

<sup>7</sup> Individual item charges must be added manually to patron account in **Polaris Koha**.

## REPLACEMENT COSTS FOR MATERIAL USED BY SINGLE AGENCY

LOMPOC	
Books on CD – full set	50.00
ILL – out of system	Cost of item



Trade paperback	20.00
-----------------	-------

On July 25, 2013, the Administrative Council approved different default replacement costs for individual jurisdictions.

\*PR charges \$10.00 processing fee for items replaced by patrons.

## BLACK GOLD OVERDUE FINES

Daily <sup>1</sup> charges listed first, followed by the maximum charges per item

TYPE	SP	LM	PR <sup>3</sup>	SM <sup>2</sup>	GV	CC
Adult Books	0	.25-8.00	0	.25-8.00	0	0
Audios & Books on Tape	0	.25-8.00	0	.25-8.00	0	0
Blu-ray & Blu-ray Set	0	.25-8.00	0	.25-8.00	0	n/a
Connectivity Kits	5.00-cost <sup>5</sup>					
DVD/DVDSET	0	.25-8.00	0	.25-8.00	0	0
Book Club Kits	n/a	.25-8.00	0	1.00-8.00	0	0
Express Books	n/a	n/a	0	n/a	0	0
ILL – out of system	0	.50-cost of book	0	.25-8.00	0	0
Hotspot	.25-8.00	.25-8.00	0	.25-8.00	0	0
Juvenile Books	0	.25-8.00	0	.25-8.00	0	0
Laptops	8.00-1200.00	n/a	n/a	.25 - 8.00/hour	0	0
Library of Things	n/a	n/a	n/a	.25-8.00	0	0
Paperback Cataloged	0	.25-8.00	0	.25-8.00	0	0
Periodicals	0	.25-8.00	0	.25-8.00	0	0
Reference/Special Loans	0	.50-8.00	0	.25-8.00	0	0
Rental Books	0	1.00-8.00	n/a	.25-8.00	0	n/a
Video Game	0	.25-8.00	n/a	.25-8.00	0	n/a
Videos	0	.25-8.00	n/a	n/a	0	n/a

<sup>2</sup> SM – Pamphlets and Spanish paperbacks .25-8.00

<sup>3</sup> PR – Charges billed by lending institution

<sup>5</sup> “cost” = whatever we use for maximum cost of item or whatever fine would be whatever fine total would be when converting to LOST

### FINE LIMITS ON SERVICE

	<b>SP</b>	<b>LM</b>	<b>PR</b>	<b>SM</b>	<b>GV</b>	<b>CC</b>
Fine Limits	10.00	10.00	10.00	10.00	<del>25.00</del> 10.00	25.00

### BLACK GOLD FEES AND CHARGES

	<b>SP</b>	<b>LM</b>	<b>PR</b>	<b>SM</b>	<b>GV</b>	<b>CC</b>
Hold fee *	n/a	n/a	n/a	n/a	n/a	n/a
Microfilm Requests	case by case	15.00	2.00/roll	case by case	n/a	n/a
Replacing Cards	1.00***	2.00	1.00	1.00	2.00	1.00
Requests – out of system	5.00	15.00	n/a	4.00	15.00	15.00
Temporary Cards	n/a	n/a	n/a	10.00 deposit 20.00 if no ID	n/a	n/a
<p>*Effective July 1, 2014, the Administrative Council approved the elimination of an official hold fee. However, if desired, a jurisdiction can manually charge hold fees.</p> <p>**Effective October 2020, Administrative Council voted to drop fines to \$0.00 for the Cataloging Branch which controls <b>CAPRIA</b> (app) and ITIVA (phone renewal) fines charged at renewal.</p> <p>***1<sup>ST</sup> replacement cards; 5.00 thereafter</p>						

## CHECK-IN

### UNIFORM CHECK-IN PROCEDURES

Black Gold libraries will check-in all types of materials including books and AV (audio visual) that are returned to their library regardless of which Black Gold library owns the item. Library of Things (LOT) items should be checked in and returned at the owning library. If a LOT item is returned to a non-owning library, it should be checked in and placed in transit/sent back to the owning library immediately after check in.

Patrons who happen to see another Black Gold library's item that has been returned to the counter and wants to check it out, may do so if there are no holds on the item. The exception to this is items that are a part of a 'LOT' collection. LOT items may not be immediately checked out upon return. However, returned items that belong to another Black Gold library should not be made browsable for the public, but returned expediently via delivery to the owning library.

## RFID

RFID tagged items from a different jurisdiction with incorrect information/blank tags can be programmed by the receiving library or the item may be sent back to the owning library.

## IN TRANSIT

Black Gold will run a quarterly In-Transit report for items which have had that status for 1 month or longer. The report will be available through the ILS toolbar under custom reports for each jurisdiction. Each library should search its shelves within 2 weeks of receipt of the report and change item status accordingly. Items In-Transit to another library from the owning library should be checked first; then items In-Transit from libraries other than the owning library should be searched.

Note: We can run our own reports, so maybe this should state Black Gold will request libraries run the report and look for items, so libraries are all on the same schedule?

## LOST MATERIALS

On September 24, 2004, at the recommendation of the ATS Operations Committee, the Administrative Council agreed to end the requirement that libraries reconcile payments between libraries for damaged and lost items. It was thought that the administrative costs of keeping and tracking the information cancelled out the amounts collected.

It had been a past practice of Black Gold member libraries to collect money for damaged and lost items on behalf of other jurisdictions and to keep a record of those charges. Twice a year these would be reconciled, and payment returned to the owning library.

## REFUNDS FOR LOST AND PAID ITEMS

Refund practices vary by jurisdiction. Patrons must apply for a refund (if applicable) at a library within the jurisdiction where the charges for the lost item were paid.

Jurisdiction	Refund Given and Timeframe
PR	Yes, within 3 months of payment for the lost item
GO	No refunds
SM	No refunds
LM	Yes within 3 months of payment for the lost item
SP	?
CC	No refunds

## WAIVING FEES FOR LOST OR DAMAGED ITEMS

When an item has had charges for damages or loss placed on it by a jurisdiction, staff at another jurisdiction will not remove or waive fees that have an existing item attached to

the patron account without first consulting supervisory staff at the owning library. An exception to this is made for juvenile/teen patron types aging up to an adult patron for “deleted” item charges only. In this case, charges associated with a “deleted” item in the juvenile/teen account would be removed prior to the change in patron type, or if the patron in the juvenile or teen patron category is to be deleted from Polaris.

### Lost/Missing Items Contacts

Library	Contact	Phone#	Ext.	Fax #	Email
PR	Christiansen, Karen	805.237.3871			kchristiansen@prcity.com
GO	<del>Acton,</del> Michele Jil Ronkainen	805.964.7878		805.683.3721	<a href="mailto:macton@cityofgoleta.org">macton@cityofgoleta.org</a> <a href="mailto:jronkainen@cityofgoleta.org">jronkainen@cityofgoleta.org</a>
SM	Fierro, Selena	805.925.0951	2514	805.922.2330	<a href="mailto:sfierro@cityofsantamaria.org">sfierro@cityofsantamaria.org</a>
LM	Keen, Dominic	805.875.8782		805.736.6440	<a href="mailto:D_keen@ci.lompoc.ca.us">D_keen@ci.lompoc.ca.us</a>
SP	Formanek, Justin	805.523.3615	102	805.933.2324	Justin.formanek@blanchardlibrary.org
CC	Castro, Eric	805.684.4314			<a href="mailto:Ericc@carpinteriaca.gov">Ericc@carpinteriaca.gov</a>

### HOTSPOT: SUSPEND/ACTIVATE

On 5/21/21 Admin Council voted to no longer share hotspots amongst jurisdictions (holds to patrons outside the owning jurisdiction are not allowed) effective July 1, 2021.

Black Gold manages Hotspots for circulation to patrons (T-Mobile is the vendor utilized). When a hotspot is not returned on time, service on that Hotspot should be suspended so the monthly service payment is stopped. It will be up to each library’s discretion about how soon they want to suspend service for an overdue or missing device. Call or send an email to BG with device ID and request suspension. *A suspension through T-Mobile is good for 90 days after which it automatically reactivates.* Prior to the 90-day auto-renewal, the library will have to inform BG to either cancel the device or extend the suspension. If a device is cancelled, the library may request a replacement device be ordered. Replacements should be ordered as soon as the device is determined to be lost. Do not wait; Black Gold prefers individual requests rather than batch cancellation requests.

To reactivate service on a device that has been suspended, call or send an email to BG with device ID and request re-activation. BG will notify library once item is re-activated.

## LIBRARY MANAGED HOTSPOTS

Occasionally, libraries will purchase Hotspots outside of the contract Black Gold has with T-Mobile. These devices are generally paired with a laptop/Chromebook, used only by staff or for other specific uses. Black Gold staff cannot provide technical assistance for these hotspots. Individual jurisdictions will need to contact the carrier directly for technical support, to temporarily suspend devices, or any other issues that may arise.

These Hotspots owned by the libraries should be labeled in a manner that identifies to Cooperative members the individual jurisdiction's ownership. The SIM card unique ID needs to be noted in the item record as does the device name. The device name should not match the name of devices owned by BG and it should indicate the jurisdiction. Labeling must:

- Be different than what BG uses
- Not use BG in the identification label
- Use a unique name that cannot be confused with other jurisdictions (ex: not hotspot 1)

For example:

*SMPL001 (Santa Maria Public Library)*

*Libraries are encouraged to keep a spreadsheet of pertinent information to help with hotspot troubleshooting. Example tracking spreadsheet:*

PW - ORIG	IMEI Number	PHONE NUMBER	SIM Number	BG WIFI SSID	BG WIFI PW	STATUS
21445358	868915021445358	805.574.0023	8901260511741985180	Bgc001	llovelylibrary	ACTIVE

If devices other than T-Mobile are purchased ATS does not have any technical support guidelines.

## BEST PRACTICES FOR DAMAGED/INCOMPLETE ITEMS

When a damaged item is returned to a library, follow the applicable procedure below when the damage is noticed:

IF ITEM IS NOT CHECKED IN:	
IF PATRON IS PRESENT:	IF PATRON IS NOT PRESENT:
<ul style="list-style-type: none"> <li>• Do not check the item in.</li> <li>• Renew item, if necessary.</li> <li>• Tell patron it will stay on their record while it is being evaluated.</li> </ul>	<ul style="list-style-type: none"> <li>• Do not check the item in.</li> <li>• Renew item, if necessary.</li> <li>• Attempt to contact the patron to let them know that the item will remain</li> </ul>

<ul style="list-style-type: none"> <li>• Add a note to the patron record with information about the damage.</li> <li>• Send the item to the owning library in an inter-office envelope with a note about the problem.</li> <li>• The owning library will decide how to proceed once it received the item.</li> </ul>	<p>on their account and that the item is being forwarded to the owning library.</p> <ul style="list-style-type: none"> <li>• Add a note to the patron record with information about the damage and that it was re-checked out on [date]</li> <li>• Send the item to the owning library in an inter-office envelope with a note about the problem.</li> <li>• The owning library will decide how to proceed once it received the item.</li> </ul>
<b>IF ITEM IS CHECKED IN:</b>	
<b>IF PATRON IS PRESENT:</b>	<b>IF PATRON IS NOT PRESENT:</b>
<ul style="list-style-type: none"> <li>• Recheck the item out to the patron.</li> <li>• Tell patron it will stay on their record while it is being evaluated.</li> <li>• Add a note to the patron record with information about the damage.</li> <li>• Send the item to the owning library in an inter-office envelope with a note about the problem.</li> <li>• The owning library will decide how to proceed once it received the item.</li> </ul>	<ul style="list-style-type: none"> <li>• Recheck the item out to the patron.</li> <li>• Attempt to contact the patron to let them know that the item will remain on their account and that the item is being forwarded to the owning library.</li> <li>• Add a note to the patron record with information about the damage.</li> <li>• Send the item to the owning library in an inter-office envelope with a note about the problem.</li> <li>• The owning library will decide how to proceed once it received the item.</li> </ul>

## CLAIMS

### CLAIM RETURNED

Claim Returned in **Polaris Koha** does NOT move to Lost automatically. The item goes to Lost status in Polaris ONLY after going through the entire notice cycle in a patron's account.

Once library staff move an item into claim status (~~claim returned or claim never had~~ **Claims Returned/Claims Never Had**) for a patron, the process becomes manual.

Staff must manually check in that item, which severs the link to the patron's account.

Staff must then move the item to "missing" status manually by opening the item record and changing the status from "on-shelf" to "missing."

All libraries allow patrons to claim that library materials currently out on their cards have been returned. Below are specific library policies for Claim Returned:	
<b>SP</b>	Patrons do not lose borrowing privileges due to the number of their Claim

	Returned items. Items are Claim Returned at staff discretion.
<b>LM</b>	Patrons are allowed 3 Claim Returned that do not go to lost. These are items owned by Lompoc's system. They do not lose borrowing privileges.
<b>PR</b>	Patrons may lose borrowing privileges due to the number of their Claim Returned items. Items are Claim Returned at the staff's discretion.
<b>SM</b>	Up to 2 items may be set to Claim Returned until 6 weeks after due date. Notices sent during search period. If 3 or more items, shelf search has to be done first. Patron is billed for items 6 weeks after due date and then lose borrowing privileges.
<b>GV</b>	Patrons are allowed 3 Claim Returned that do not go to lost. These are items owned by Goleta's system. They do not lose borrowing privileges.
<b>CC</b>	Patrons do not lose borrowing privileges due to the number of heir Claim Return items. Items are Claim returned at staff discretion.

## NUMBER OF CLAIM RETURNED ALLOWED

The table below shows:

- The number of **unresolved** Claim Returned (C/R) items allowed before borrowing privileges are suspended.
- How and when Claim Returned items are set to Lost.

	<b>SP</b>	<b>LM</b>	<b>PR</b>	<b>SM</b>	<b>GV</b>	<b>CC</b>
Limit of C/R items	case by case	3	Case by case	2	3	Case by case
C/R to lost	manually set @ 60 days *	leave in C/R status	Case by case	manually set @ 42 days *	Leave in C/R status	Leave in C/R status
<p>*Polaris system – Items appear on a sequence of lists throughout a 60-day period. At the end of the period, staff must manually do 1 of 3 things:</p> <ol style="list-style-type: none"> <li>1. Return the item</li> <li>2. Change the items status to "Missing"</li> <li>3. Put a manual replacement charge on the patron's account with a note, if that is the local policy.</li> </ol>						

## COLLECTION POLICIES

As of October 2012, all Black Gold libraries use Unique Management for collections.

## LIBRARY JURISDICTION CODES

BLACK GOLD COOPERATIVE SYSTEM LIBRARY JURISDICTION CODES					
<b>GV</b>	Goleta Valley		<b>PR</b>	Paso Robles	
<b>L</b>	Lompoc		<b>SP</b>	Santa Paula	

<b>M</b>	Santa Maria	<b>CC</b>	Carpinteria
----------	-------------	-----------	-------------

## ATS LIBRARY JURISDICTION AND BRANCH CODES

### **C Carpinteria Community Library**

CC Carpinteria Community Library

### **G Goleta Valley Library**

go Goleta Branch  
 gl Los Olivos  
 gs Solvang  
 gu Buellton  
 gy Santa Ynez  
 gbv Goleta Valley Library Book Van

### **L Lompoc Public Library**

lc Charlotte's Web Mobile Library  
 lm Lompoc (Main)  
 lv Vandenberg Village

### **M Santa Maria Public Library**

ma Los Alamos  
 mc Cuyama Branch  
 mg Guadalupe Branch  
 mm Santa Maria (Main)  
 mo Orcutt Branch  
 mb Bookmobile

### **PR Paso Robles City Library**

prs Library Study Center  
 pr Paso Robles City Library

### **SP Blanchard/Santa Paula Public**

sp Blanchard/Santa Paula Library

### **Black Gold Headquarters Codes**

ATS Automation and Technical Services  
 CU Cataloging Unit  
 BG Black Gold Office (BGCLS, BGHQ)

**DELIVERY**

**BLACK GOLD DELIVERY**



Currently, Black Gold runs a single round trip delivery schedule, Tuesdays and Fridays, to all the main library member jurisdictions and to Black Gold headquarters. Holiday week scheduling is determined based on library hours and availability of the Central Courier driver. Monthly deliveries that include San Luis County Library and Santa Barbara Public Library are being scheduled and are subject to approval by the Administrative Council Members.

The delivery route starts in Santa Paula with the driver arriving at the Blanchard Library at 6:30 a.m. Delivery schedules fluctuate with traffic conditions and delivery volume. Delivery times are delayed 60-80 minutes on days that include stops at Santa Barbara and San Luis Obispo.

## MISC

### LIBRARY HOURS

Via [www.ats.blackgold.org](http://www.ats.blackgold.org) > Admin Resources > Library Hours, there are links to the pages at the member jurisdiction websites that list library hours, phone numbers and locations.

### INTERLIBRARY LOAN CONTACTS

Jurisdiction	ILL Staff	Phone Number
SP	Nancy Duenas	805.525.3615 x 101
GO	<del>Brent Field</del> Carla Mason	805.964.7878
LM	Dominic Keen	805.875.8782
PR	Karen Christiansen	805.237.3871 x801
SM	Kathy Lambert	805.925.0994
CC	Eric Castro	805.684.4314

### LIBRARY FAX NUMBERS

Jurisdiction	Branch	Fax Number
SP		805.933.2324
GV	Goleta Valley Library	805.683.3721
LM	Lompoc (Main)	805.736.6440
	Village	805.733.3323 (phone first, shares with voice)
PR		<del>238-3665</del>
SM	Santa Maria (Main) (branches do not have faxes)	805.928.7432
CC	Carpinteria	n/a

## GLOSSARY

A	Adult
ATS	Automation and Technical Services (BG libraries sharing the ILS)
AV	Audio visual material
BG	Black Gold Cooperative Library System

GV	Goleta Valley Library
CC	Carpinteria Community Library
ILS	Integrated Library System
J	Juvenile
LM	Lompoc Public Library
MM	Santa Maria Public Library
OPAC	Online Public Access Catalog
PR	Paso Robles City Library
SM	Santa Maria Public Library
SP	Blanchard/Santa Paula Public Library
TNS	Telephone Notification System
TRS	Telephone Renewal System

## STATISTICS

Statistics are dependent on local library policies and local circulation systems. The Black Gold ITS ILS provides statistics monthly to each member library.

## APPENDIX

- NOTICE TEXT
- TYPICAL NOTICE, BILLING, COLLECTION CYCLE - POLARIS
- SUPPLEMENTAL NOTICE PROCESSING EXPLANATION

## NOTICE TEXT

September 2014

<b>Bill (Print only by Unique)</b>	<b>BILL BODY</b>	
	<b>Custom</b>	The goal of the library is to recover the library materials listed above. If items are not returned promptly, non-payment of this bill will cause your account to be referred to a collection agency. While you will not be reported to any credit bureaus, the library utilizes a collection agency to assist us with materials recovery. Should you be referred to the agency, an additional fee may be added to your account.
	<b>Default</b>	THIS IS A BILL. Your account has been charged for failure to return the following items. Please remit payment or contact the library as soon as possible.
<b>Cancel email</b>	<b>CANCEL HEADER</b>	
	<b>Default</b>	Your request has been cancelled
	<b>CANCEL BODY</b>	
	<b>Custom</b>	Material you requested is no longer available. Please contact your local library for more information. Manage or view your account at <a href="http://www.blackgold.org">http://www.blackgold.org</a> .
	<b>Default</b>	Your request for:
	<b>EMAIL FOOTER</b>	
<b>Custom</b>	View account at <a href="http://www.blackgold.org">www.blackgold.org</a> or renew items via phone at 1-800-354-9660.	

	<b>Default</b>	If you do not wish to receive this information via email, please reply to this message or contact the library.
<b>Cancel text</b>	CANCEL BODY	
	<b>Default</b>	Your request has been cancelled for title: [TITLE].
<b>Fines (print only by Unique)</b>	FINE HEADER	
	<b>Default</b>	FINE NOTICE
	FINE BODY	
		This notice is to inform you that our records indicate your account has accrued fines/fees due to past due materials. If this situation is not addressed promptly, your account may be referred to a collection agency.
	<b>Custom</b>	The library's goal is to have our materials returned for use by our community. While you will not be reported to the credit bureaus, we do utilize a collection agency to assist us with materials recovery. Should you be referred to the agency, an additional fee may be added to your account.
	<b>Default</b>	Our records show at least \$50.00 in fines for your account. If not paid, the account may go to collections 2 weeks from the date of this notice.
<b>Hold email</b>	HOLD HEADER	
	<b>Default</b>	Requested items are ready for you
	HOLD BODY	
	<b>Custom</b>	Material you requested is available for pickup and will be held until the date listed below. Please disregard this notice if this item(s) has already been picked up. Please bring your library card when picking up the item(s). Manage or view your account at <a href="http://www.blackgold.org">http://www.blackgold.org</a> .
	<b>Default</b>	The following items are being held for you at the library. Please pick the items up on or before the date indicated.

<b>NOTICE TEXT cont.</b>		
<b>Hold mail (only if phone not answered)</b>	HOLD HEADER	
	<b>Default</b>	Requested items are ready for you
	HOLD BODY	
	<b>Custom</b>	Material you requested is available for pickup and will be held until the date listed below. Please disregard this notice if the item(s) have already been picked up. Please bring your library card when picking up the item(s). Manage or view your account at <a href="http://www.blackgold.org">http://www.blackgold.org</a> .
	<b>Default</b>	The following items are being held for you at the library. Please pick the items up on or before the date indicated.
<b>Hold text</b>	HOLD BODY	

	<b>Default</b>	You may pick up [TITLE] at [BRANCH] until [DATE].
	OVERDUE HEADER	
	<b>Custom</b>	1 <sup>st</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	OVERDUE BODY	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
	OVERDUE HEADER	
	<b>Custom</b>	2 <sup>nd</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	OVERDUE BODY	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
	OVERDUE HEADER	
	<b>Custom</b>	3 <sup>rd</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	OVERDUE BODY	
	<b>Custom</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible or you will be billed a replacement fee.
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
<b>Overdue email</b>	OVERDUE HEADER	
	<b>Custom</b>	1 <sup>st</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	OVERDUE BODY	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
	OVERDUE HEADER	
	<b>Custom</b>	2 <sup>nd</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	OVERDUE BODY	
	<b>Custom</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible or you will be billed a replacement fee.
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
	OVERDUE HEADER	
	<b>Custom</b>	1 <sup>st</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
<b>Overdue mail (only if phone not answered)</b>	OVERDUE BODY	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
	OVERDUE HEADER	
	NOTICE TEXT cont.	
	<b>Custom</b>	2 <sup>nd</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	OVERDUE BODY	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
	OVERDUE HEADER	
	<b>Custom</b>	3 <sup>rd</sup> Overdue Notice
	<b>Default</b>	OVERDUE NOTICE
	OVERDUE BODY	
	<b>Custom</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return
	<b>Overdue mail (only if phone not answered) cont.</b>	OVERDUE BODY
<b>Custom</b>		As of the date shown our files show that the following items charged to your account are overdue. Please return

		these item(s) as soon as possible or you will be billed a replacement fee.
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
<b>Overdue text</b>	OVERDUE BODY	
	<b>Default</b>	As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.
<b>Reminder email (email only)</b>	OVERDUE HEADER	
	<b>Custom</b>	Status of Library Items
	OVERDUE BODY	
	<b>Default</b>	JUST A REMINDER. The following items are due back to the library on the dates indicated. Please return or renew these items at your convenience.

## TYPICAL NOTICE AND BILLING CYCLE – POLARIS

3 Days after due date	<b>First Overdue Notice</b> “These items(s) are OVERDUE. Please return them to avoid increasing fines.”
10 Days after due date	<b>Second Overdue Notice</b> “The following item(s) are OVERDUE. Please return them as soon as possible to avoid increasing fines.”
17 Days after due date	<b>Third Overdue Notice</b> “FINAL NOTICE to return item(s) listed. If not returned, you will be billed replacement cost. Contact YOUR LOCAL LIBRARY if you have questions.”
30 Days after due date	<b>Replacement Bill</b> “The following item(s) have been charged as lost. It is possible you may owe additional money for other items on your account.” When Polaris sends the bill the item is changed to ‘lost’ on the patron account.
Overdue and Bill Notices are sent using the 'lending library' address. Fine notices are sent using the patron's registered library.	

Email, print, text and telephone notifications are sent daily (phone notices are not sent on Sundays).

If the telephone call attempts fail on overdue/hold notices (5 attempts made – 3 per cycle), then the notice goes to paper.

These attempts begin on the days noted in this cycle. If they fail, it can delay the receipt of the notification.

- Phone notices are sent:
  - 9:30 am – 6:00 pm, 7:00 pm – 8:00 pm Monday-Friday (2 cycles)
  - 10 am – 6:00 pm Saturday (1 cycle)

- Fee notices and Bills are sent by printed notice only.
- Almost overdue notices are sent by email only.
- Text notices occur twice per day: 7:30 am, 4:30 pm

Encourage patrons to use email, phone or text notifications methods!

## COLLECTION CYCLE – POLARIS

The patron account goes to Unique when \$40 in fines/fees have accumulated and the fines/fees have 'aged' 30 days (see Fine aging). Submission to collections is based on the item's owning branch.

- Fine aging example: If the min balance is \$25 and the patron had \$20 in existing charges on the account and \$5 additional charges were added 30 days ago then that account would now be eligible to be sent to collections. If the same patron made a \$1 payment on the account toward either of the charges on day 29 of the \$5 charge then the account would not be eligible to go to collection on day 30 since they are only at \$24, even though all the existing charges are old enough. The patron would then need an additional \$1 or more added to the account for at least 30 days before the account is sent.

Unique Submission	\$40 in fines/fees aged 30 days on patron account. \$10 collection agency fees will be applied to patron account.
Unique Management Services letters	<b>1<sup>st</sup> Letter</b> sent immediately upon receiving collections report from Black Gold (reports are now sent daily).
	<b>2<sup>nd</sup> Letter</b> sent 3 weeks after 1 <sup>st</sup> letter.
	<b>Reminder Letter</b> sent if patron has responded and there is a balance remaining.
Unique Management Services telephone call(s)	If patron has remaining balance 14 days after last letter, UMS will begin calling person.

SUPPLEMENTAL NOTICE PROCESSING EXPLANATION

