



**AUTOMATION AND TECHNICAL SERVICES  
(ATS) OPERATIONS COMMITTEE AGENDA  
Wednesday, September 6, 2023– 10:00 a.m.  
Webinar**

**Join on your computer, mobile app or room device:** [Click here to join the meeting](#)

Meeting ID: 289 321 990 870

Passcode: soH5bm

\* 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 —** August 2, 2023, by Kristina Uvalle (BG)

**4) CIRCULATION**

- a) \*Shared Item Templates (SP) - When someone shares a template, it goes to all jurisdictions. If one branch creates and shares its templates, it takes over the whole shared list. This makes it difficult for other branches to identify theirs that have been shared.
- b) \*Circ Manual Topic - Notices (BG) – Present the new format for the Circ Manual. Review how notices can be edited within Koha. Discuss whether there should be a standard text on all notices or whether libraries should be able to customize by jurisdiction.
- c) \*Delivery Matrix (BG) – Present and review how the transport matrix works within Koha.
- d) *M* - Previous Barcode field (BG/PR) – The Previous Barcode field has been set-up as a customizable field in Koha. If it is used to look up a patron account, it will pull up the new account number and allow checkouts. Eric at PR has requested we consider eliminating the Previous Barcode field as searchable. Discuss why libraries may need to use this field and whether it can be deleted.
- e) \*Database management (BG) – Discuss possible policies for Patron Purge. Is a library responsible for purging their own records. Should Black Gold purge patron records? What is the best way to purge multiple records at a time? What other database management tasks need to be conducted within Koha? For example: How long should notes remain in a patron record?

**5) TECHNICAL**

**6) BLACK GOLD UPDATE**

**7) ROUNDTABLE**

**8) ITEMS TO BE FORWARDED —** (To Council or other committees)

**9) AGENDA BUILDING**

**10) NEXT MEETING —** 10:00 a.m., Wednesday, October 4, 2023 (Lompoc)

**11) ADJOURNMENT**

**AUTOMATION AND TECHNICAL SERVICES  
(ATS) OPERATIONS COMMITTEE MINUTES  
Wednesday, August 2, 2023– 10:00 a.m.  
Webinar**

Attending: Karen Christiansen, PR; Joanne Britton-Holland SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Eric Castro, CC; Brenda Goldy, SP; Matt Duhon, ATS; Glynis Fitzgerald, BG; Kristina Uvalle, BG.

**1) 10:02 A.M. CALL TO ORDER** Glynis Fitzgerald, Chair, Presiding  
Recorder; Kristina Uvalle (BG)

**2) ADOPT AGENDA** — Add Chat app to technical. 1<sup>st</sup> KC/ 2<sup>nd</sup> DK. Approved.

**3) \*APPROVE MINUTES** — July 5, 2023, by Kristina Uvalle (BG) Correct Jonne Britton-Holland name. 1<sup>st</sup> Kc/2<sup>nd</sup> DK. Approved.

**4) CIRCULATION**

a) \*Waiving Lost charges on Lost (Long Overdue) (SP) – Discuss revising the procedure for WAIVING FEES FOR LOST OR DAMAGED ITEMS in the circulation manual.

Waiving the fee doesn't work for Santa Maria as they still charge overdue fines. However, libraries no longer reimburse any money collected to owning libraries. It was pointed out that because libraries operate on the "My house, my rules" model, a library would only need to adjust the Lost Fee Return setting in their circ rules to reflect their lost item policies.

b) Circ Manual Topic - Holds in Koha (BG) – Review how holds currently operate in the Koha system. Discuss whether bookmobiles and smaller branches are used to fill holds. Review the order in which holds are pulled in the system.

BG is looking at ways to reconfigure the transport cost matrix to better serve our libraries. We are also looking at using the LocalHoldsPriority setting or the weighted option for filling holds. Things to keep in mind: the LM bookmobile does not fill holds, the GV and SM bookmobiles do pull holds, the Study Center is undecided at this point.

**5) TECHNICAL**

a) Mobile App Status Update (BG) – discuss where we are at with our Mobile app situation and what the next steps should be.

The Capira app is still not working correctly. BG is recommending libraries switch to using the free LiDA app. We have turned on the settings in Aspen for all libraries. The favicons will be corrected in the next LiDA upgrade in two weeks.

b) \*I-Tiva (BG) – Discuss whether there is a need to adjust settings in our i-Tiva phone noticing system.

ATS is recommending to the Admin Council that we eliminate the 2<sup>nd</sup> time and reduce the number of attempts to 3. The new call schedule would be from 9:30 a.m. to 6 p.m. with a total of 3 attempts in that time frame.

c) Chat App (BG)

Matt reported that PR is currently testing the app with staff. He will work with each library to set up and customize each library's settings. Contact Matt to schedule a time for set-up.

**6) BLACK GOLD UPDATE**

The Admin Council has moved to set eCards to expire after 3 months beginning October 1<sup>st</sup>. Each library is still deciding on when and how to delete records.

- 7) ROUNDTABLE** N/A
- 8) ITEMS TO BE FORWARDED** — iTiva recommendation to the Admin Council
- 9) AGENDA BUILDING** – N/A
- 10) NEXT MEETING** — 10:00 a.m., Wednesday, September 6, 2023 (Webinar)
- 11) ADJOURNMENT** at 12:07. 1<sup>st</sup> KC/ 2<sup>nd</sup> ES.

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

<b>TOPIC:</b>	Shared Item Templates	<b>PRIORITY LEVEL:</b> (1-Low 3 – High)	<input type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input type="checkbox"/> 3
<b>SUBMITTED BY:</b>	Brenda Goldy (SP)		
<b>TYPE OF ITEM:</b>	<input checked="" type="checkbox"/> For Discussion <input type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____		
<b>BACKGROUND STATEMENT</b>			
<b>BACKGROUND:</b> <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	The new feature of being able to create item templates and share them is great but I have encountered a few problems with sharing them. When someone shares a template, it goes to all jurisdictions. If one branch creates and shares its templates, it takes over the whole shared list. This makes it difficult for other branches to identify theirs that have been shared. If you try and use another branch's template, it does not update the home branch information. Also, I do not see a way to edit or stop sharing a template without deleting it.		
<b>OUTCOME(S)</b>			
<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>	To create best practices for using item templates. A possible solution is to add branch or jurisdiction codes at the beginning of the template names.		
<b>OTHER COMMENTS:</b>			

It is when creating a new item. Santa Maria has put in tons of them. I had created a YA FIC template and shared it so others in our library could use it (first pic). In the second pic, is part of the list that SM created, and they already have a YA FIC template. I checked Olivia's account, and it lists both templates with the same name. Notice the scroll bar of how many they have added. In the last pic, I chose their template and it put in their library location.

They only have the option to delete a template. I looked in the tools area to see if I could find a master list that could be edited but didn't see one.

**Add item**

☐ For session

**My templates**

- Audiobook
- YA FIC (shared)

**Shared templates**

- CALDECOTT FIC
- CALDECOTT NON-FIC
- J ABC BOARD BOOK**

**Drawn status**

**Lost status**

**Classifying scheme** Dewey Decimal Classification

**Volume or other part**

**Tagged status**

**7 - Circulation Status** In processing

**8 - Collection code**

**a - Home library** Blanchard Community Library

**b - Current library** Blanchard Community Library

**c - Shelving location**

**d - Date acquired**

**e - Source of acquisition**

## Add item

**YA FIC**

- YA CLASSICS
- YA FIC**
- YA GRAPHIC FIC
- YA GRAPHIC NON-FIC
- YA MANGA
- YA NEWBERY FIC
- YA NON-FIC

**7 - Circulation**

YA FIC x ▾

Apply template

☐ For session

Clear template

Delete template

0 - Withdrawn status

1 - Lost status

2 - Source of classification or shelving scheme

3 - Materials specified (bound volume or other part)

4 - Damaged status

7 - Circulation Status

8 - Collection code

a - Home library

b - Current library

c - Shelving location

d - Date acquired

e - Source of acquisition

# BLACK GOLD COOPERATIVE LIBRARY SYSTEM

## CIRCULATION AND INTERLIBRARY LOAN MANUAL

## **January 20, 2023**

Automation and Technical Services Operations Committee approved on January 4, 2023

Approved by Black Gold Administrative Council on January 20, 2023.

Updates made after January 2023 in Red

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: Megan Weber, PR; Stacy Brigman, Joanne Britton- Holand, SM; Dominc Keen, LM; Elizabeth Saucedo, GO; Eric Castro, CC; Brenda Goldy, Nancy Duenas, SP; Glynis Fitzgerald, Matt Duhon & Kristina Uvalle, BG; Library Directors: PR, SM, LM, SP, CC, GO.



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# **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 last name, comma and first three letters of the first name. Confirm results using date of birth.
  - b. Search using privacy-protected format of driver's license number. Confirm results using date of birth. Entering the Full driver's license will not retrieve patron account; must enter the last four digits of the ID. Koha will search for other IDs so long as the format includes the privacy format.
  - c. Search using patron's date of birth.

## **BARCODE**

1. New patrons – scan account number from library card.
2. 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. For Best Practice, the barcode prefix and registered library should match.

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

## SCANNER – PATRON ENTRY

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.

### 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.

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

### FIRST NAME

Legal first name printed on identification (do not use nickname or abbreviations). First letter capitalized. Optional 'Legal name if different' field available for patrons who use name other than their legal names for patron account.

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

## 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.

## ADDRESS

A valid home address is required for all patrons except for “internet only” and “Welcome”. State law requires that patrons receive written notices before being sent to collections. **It is imperative we have a valid address.**

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, city and state.

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

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

## TELEPHONE/EMAIL, ETC.

Enter as appropriate. Set notification option according to patron’s choice. Not required fields in Koha.

<b>RULE</b>	<b>EXAMPLE</b>
Enter the number in the Primary phone field. If a second number has been provided, enter it in the Secondary phone field.	Telephone #: 805-777-7777

## PHONE FIELD ENTRY GUIDELINES

“Primary phone” 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).

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. 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 notices that are not completed (answered) will receive a print bill notice after 30 days.

## 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.

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 no 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.

## PASSWORD

Will default overnight to last four digits of phone number if nothing is entered. If no phone number is entered, default to '1234'.

## 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.

## DATE OF BIRTH

Enter the date of birth, which is required, in the (MM/DD/YYYY) format. If patron refuses to provide the year of birth, enter the birth year as 01-01-1900.

## UNIQUE ID

Enter the last four digits of the ID number, followed by the type of ID in this order:



**Driver's License**

1. Enter the last four digits of the number, followed by a space.
2. Enter the abbreviation of the issuing state, followed by **DL** to denote Driver's License, (with the exception of California which would be entered as CDL). Do not place a space between the two (i.e. AZDL, not AZ DL).

**9760 CDL                      1721 WADL**

**State ID**

Follow the same entry procedure as Driver's License; use **ID** to denote identification.

**9760 CID**

**Military ID**

1. Enter the last four digits of the number, followed by a space, then **MLID**

**0628 MLID**

**Alien Resident Number**

1. Enter the last four digits of the number, followed by a space
2. Enter **INSID** (Immigration & Naturalization Identification) and the issuing country.

**0497 INSID Mexico**

**Passport Number**

1. Enter the last four digits of the number, followed by a space.
2. Enter **PPN**, followed by a space.
3. Enter the country of origin, or the country's abbreviation (e.g. **USA**).

**9023 PPN USA**

**4568 PPN FRA**

**Border Crossing Card**

1. Use the back of the card (no photo)
2. Use the last four digits of the number at the bottom on the first line beginning with MEX

**MEX 6789**

**Matricula Consular**

1. Enter the last four digits of the number in the lower right corner on the picture side of the ID location below the expirations date followed by a space
2. Enter the country abbreviation followed by a space then **MAT CON**

**1244 MX MAT CON**

**Employment Authorization Document**

1. Use the front of the card (photo)
2. Under the name is a USCIS number. Enter the last four digits of the number followed by a space, then **USEA**

**1244 USEA**

## PARENT/GUARDIAN

Only use for Juvenile or Teen cards. Input information in ID field using the same parameters listed above. Optionally a P/ may be added (meaning parent) before type of identification, i.e., 9760 P/CDL, 9760 P/CID, 0628 P/MLD, etc.

Enter first name first, middle initial or name, and last name last: **Mary Jane Patron**

## STAFF INITIALS

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

## STANDARDS FOR PATRON NOTES IN 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
- 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.

## 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 2	GV	CC
Adult	ID & proof of address	ID & proof of address	ID & proof of address	ID & proof of address	ID & proof of address see below 1	See below 1
Group Cards	n/a	n/a	n/a	n/a	parent ID & proof of address see below 1	n/a
Juvenile	parent ID& proof of address	parent ID	parent ID	parent ID & proof of address	see below 1	See below 1
Welcome	ID	ID	ID	ID	see below 1	n/a
Teen	N/A	n/a	parent ID	n/a	Age 13-17 issued w/out ID and w/out proof of address	Ages 13-17 issued w/out ID
Internet Only	N/A		N/A		Ages 18 & up issued w/out ID	Ages 18 & up issued w/out ID

1 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.

2 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.

## 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.

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 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.

## CARD EXPIRATION

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

# **Circulation**

## **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.

One exception to standard loan practices is Leased 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. Hold limits are determined by Branch.

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.

## **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.

The current holds limit is 20.

This varies by jurisdiction.

Held items will be on the hold shelf for 10 open 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.

### HOLDABLE/NONHOLDABLE PARITY

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

### 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.

*Located in "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	Nicole Lvoff	nlvoff@cityofgol eta.org	805.964.7878
Carpinteria	CC	Eric Castro	ericc@carpinteri aca.gov	805.684.4314
Lompoc	LM	Dominic Keen	D_keen@ci.lom poc.ca.us	805.875.8789
	LV	Sierra Foster	S_foster@ci.lom poc.ca.us	805.733.3323
Paso Robles	PR	Don Rader	drader@prcity.c om	805.237.3871
Santa Maria	MM	Stacy Brigman	sxbrigman@city ofsantamaria.org	805.925.0994x 1508
Santa Paula	SP	Nancy Duenas	nancy.duenas@ blanchardlibrary. org	525.3615x 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	LM3	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/DVDS ET	5	5	5	5	5	5
Encyclopedia	5	5	5	5	5	5
Hotspots2	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
Passes	5					3
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	n/a	Case by case
Tablet		n/a	n/a	n/a	n/a	n/a
Laptops	0	n/a	0	0	n/a	n/a
Videos	5	n/a	n/a	n/a	n/a	n/a
Connectivity Kits	0					
*Audio includes CDs (music), Books on Tape, Cassettes, Books on CD, Read Along 2 Device suspension for overdue device branch determined. Contact Black Gold to suspend service for device. 3Lompoc Bookmobile items have a renewal of 1.						

## MATERIAL TYPES LENGTH OF LOAN PERIODS BY MATERIAL TYPE

The loan period for most materials is 21 days 1. 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
Hotspots2	7	7	7	7	7	7
Laptop	In-house	n/a	7	7	2 hours in-house	7 hours in-house
Library of Things	21	n/a	n/a	21	21	21
Passes	21	7	21	7	21	7
Playaway	n/a					
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
Special Loan			42			
Tablet	21					
Uncatalogued	no limit	n/a	n/a	21	No limit	No limit
Paperback						

\*Audio includes Book on CD, Book on Tape, Cassette, CD

2 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

## 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 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. Changing a due date inappropriately may result in disciplinary action.

## EXCEPTIONS TO OVERRIDES

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.

Total # of All Items	50	50	50	50	99	50
Audio Cassettes	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	10	no limit	50	50	99	50
Books on Tape	n/a	n/a	50	n/a	n/a	n/a
CDs	n/a	no limit	50	50	99	50
DVD/DVDSET	10	no limit	50	50	99	50
Encyclopedia	No limit <sup>1</sup>	no limit <sup>1</sup>	50	50	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
Passes	1	1	1	1	1	1
Periodicals (same title)	10	n/a	50	5A 5J	99	6
Periodicals (total)	10	n/a	50	5A 5J	99	6
Videos	n/a	n/a	50	n/a	n/a	n/a
Connectivity Kit	1 <sup>2</sup>	n/a	n/a	n/a	n/a	n/a

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

<sup>2</sup> SP – 6-month waiting period for new library card holders.



## 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	50	50	50	50	99	50
Juvenile	50	50	50	50	99	50
Student	n/a	n/a	5	n/a	n/a	n/a
Welcome	3	5	5	n/a	n/a	n/a
Teen	n/a	n/a	50	50	99	50

## 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. \*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	35.00	30.00	37.00	35.00	35.00	30.00
Fiction						
Adult Non-fiction	40.00	30.00	43.00	40.00	40.00	30.00
Audio	n/a	n/a	n/a	n/a	n/a	n/a
Cassettes						
Blu-ray 5	40.00	20.00	n/a	40.00	25.00	n/a
Blu-ray Set	50.00	30.00	n/a	50.00	36.00	n/a
Book on CD	10.00/disc 50.00 set	10.00/disc	75.00	50.00	51.00	20.00 disc 50.00 set
Book on Tape	n/a	n/a	n/a	n/a	n/a	n/a
Compact Discs (music)	n/a	10.00	n/a	30.00	20.00	20.00
DVD	30.00	20.00/2 or less discs	21.00	30.00	25.00	20.00
DVDSET (3+ playing surfaces not incl. bonus discs)	50.00	30.00/3+ discs	50.00	50.00	36.00	30.00/set
Hotspot Unit <sup>7</sup>	\$100/unit	\$100/unit	\$100/unit	\$100/unit	\$103.00	\$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 DVD	30.00					
Juvenile Blu-ray	30.00	20.00	n/a	30.00	25.00	n/a
Juvenile Fiction	25.00	30.00	29.00	25.00	25.00	25.00
Juvenile Non-fiction	25.00	30.00	29.00	25.00	25.00	25.00
Laptops	1200.00	n/a	800.00	List price	n/a	300.00
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	Actual Cost	n/a	n/a	n/a	Actual Cost	Actual Cost
Pamphlets	n/a	n/a	5.00	3.00	n/a	n/a
Paperbacks	10.00	10.00	15.00	10.00	n/a	n/a
Chargeable Periodicals	8.00	8.00	9.00	8.00	8.00	10.00
Read Along/VOX	n/a	n/a	n/a	n/a	n/a	n/a
Reference	60.00	60.00	43.00	60.00	62.00	60.00 <sup>1</sup>
Video	n/a	n/a	n/a	n/a	n/a	n/a
Cassettes						
Juvenile BkCD	10.00 disc. 50.00 set		50.00			
Juvenile BK + CD	30.00		25.00			
Book Club Kit	n/a		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> Individual item charges must be added manually to patron account in Koha.

## REPLACEMENT COSTS FOR MATERIAL USED BY SINGLE AGENCY

### LOMPOC

Books on CD – full set 50.00

set

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 & SP charges \$10.00 processing fee for items replaced by patrons. SM charges \$5.

## BLACK GOLD OVERDUE FINES

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

TYPE	SP	LM	PR3	SM 2	GV	CC
Adult Books	0	0	0	.25-8.00	0	0
Audios & Books on CD	0	0	0	.25-8.00	0	0
Blu-ray & Blu-ray Set	0	0	0	.25-8.00	0	n/a
Connectivity Kits	5.00 – 150	0	0	.25 – 8.00		
DVD/DVDSE T	0	0	0	.25-8.00	0	0
Book Club Kits	n/a	0	0	1.00-8.00	0	0
Express Books	n/a	0	0	n/a	0	0
ILL – out of system	Lending institution charges	0	0	.25-8.00	0	0
Hotspot	1.00-30.00	0	0	.25-8.00	0	0
Juvenile Books	0	0	0	.25-8.00	0	0
Laptops	8.00-1200.00	0	n/a	.25 -8.00	0	0
Library of Things	n/a	0	n/a	.25-8.00	0	0
Paperback Cataloged	0	0	0	.25-8.00	0	0
Periodicals	0	0	0	.25-8.00	0	0
Reference/Special Loans	0	0	0	.25-8.00	0	0
Video Game	0	0	n/a	.25-8.00	0	n/a

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

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

## 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	10.00	10.00

## 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	n/a	n/a	2.00/roll	n/a	n/a	n/a
Replacing Cards	1.00*	2.00	1.00	1.00	2.00	1.00
	**					
Requests – out of system	Case by case	15.00	n/a	15.00	15.00	15.00
Temporary Cards	n/a	n/a	n/a	10.00 deposit 20.00 if no ID	n/a	n/a

\*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.

\*\*Effective October 2020, Administrative Council voted to drop fines to \$0.00 for the Cataloging Branch which controls CAPIRA (app) and ITIVA (phone renewal) fines charged at renewal.

\*\*\*1ST replacement cards; 5.00 thereafter

## 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.

## IN TRANSIT

The report will be available in Koha reports 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. It is recommended that libraries run the report on a quarterly basis as a Best Practice.

## 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	Yes within 12 months
CC	Yes within 12 months

## 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 Koha.

## Lost/Missing Items Contacts

Library	Contact	Phone #	Ext.	Email
PR	Christiansen, Karen	805.237.3871		<a href="mailto:kchristiansen@prcity.com">kchristiansen@prcity.com</a>
GO	Ronkainen, Jil	805.964.7878		<a href="mailto:jronkainen@cityofgoleta.org">jronkainen@cityofgoleta.org</a>
SM	Brigman, Stacy	805.925.0994	1508	<a href="mailto:sxbrigman@cityofsantamaria.org">sxbrigman@cityofsantamaria.org</a>
LM	Keen, Dominic	805.875.8789		<a href="mailto:D_keen@ci.lompoc.ca.us">D_keen@ci.lompoc.ca.us</a>
SP	Duenas, Nancy	805.523.3615	102	<a href="mailto:Nancy.duenas@blanchardlibrary.org">Nancy.duenas@blanchardlibrary.org</a>
CC	Casto, Eric	805.684.4314		<a href="mailto:ericc@carpinteriaca.gov">ericc@carpinteriaca.gov</a>

## 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:**

- Do not check the item in.
- Renew item, if necessary.
- Tell patron it will stay on their record while it is being evaluated.
- Add a note to the patron record with information about the damage.
- Send the item to the owning library in an inter-office envelope with a note about the problem.
- The owning library will decide how to proceed once it received the item.

#### **IF PATRON IS NOT PRESENT:**

- Do not check the item in.
- Renew item, if necessary.
- 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.
- Add a note to the patron record with information about the damage and that it was re-checked out on [date]
- Send the item to the owning library in an inter-office envelope with a note about the problem.
- The owning library will decide how to proceed once it received the item.

### **IF ITEM IS CHECKED IN:**

#### **IF PATRON IS PRESENT:**

- Recheck the item out to the patron.
- Tell patron it will stay on their record while it is being evaluated.
- Add a note to the patron record with information about the damage.
- Send the item to the owning library in an inter-office envelope with a note about the problem.
- The owning library will decide how to proceed once it received the item.

#### **IF PATRON IS NOT PRESENT:**

- Recheck the item out to the patron.
- 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.
- Add a note to the patron record with information about the damage.
- Send the item to the owning library in an inter-office envelope with a note about the problem.
- The owning library will decide how to proceed once it received the item.

# CLAIMS

## CLAIM RETURNED

Claim Returned in Koha does NOT move to Lost automatically.

Once library staff move an item into claim status (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:

- SP** Patrons do not lose borrowing privileges due to the number of their Claim Returned items. Items are Claim Returned at staff discretion.
- LM** 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.
- PR** Patrons may lose borrowing privileges due to the number of their Claim Returned items. Items are Claim Returned at the staff's discretion.
- SM** 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.
- GV** 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.
- CC** Patrons do not lose borrowing privileges due to the number of their 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	Case by case	leave in C/R status	Case by case	manually set @ 42 days *	Leave in C/R status	Leave in C/R status

\*Koha 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:

1. Return the item
2. Change the items status to "Missing"
3. Put a manual replacement charge on the patron's account with a note, if that is the local policy.

## **Notifications**

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**

Notifies patrons of available holds and overdue.

### **EMAIL**

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**

Patrons may also select to receive text messages as a notice delivery option, or in addition to email and telephone notices. A mobile number must be entered into the SMS number field in the patron record. Include the carrier as indicated.

### **OVERDUE NOTIFICATION**

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

### **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 Koha two days before the due date with an email notification going to the patron. Auto-renewals are done at the same time the reminder notices are sent out. Some itypes are not renewable or renewable only by phone request. The new autorenewal due date is effective from the original due date (i.e., 23 days if renewed 2 days prior to the original due date).

Renewals of checked out items may be done by:

#### **TELEPHONE**

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 Koha system.

#### **ONLINE**

Access is provided at [www.blackgold.org](http://www.blackgold.org). Overdue items may be renewed online following standard renewal rules. Items cannot be renewed until 2 days before the item's due date.

## **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.

## **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	Illovelylibrary	ACTIVE

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

## GENERAL INFORMATION

### 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.

## 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)

## 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

<b>Jurisdiction</b>	<b>ILL Staff</b>	<b>Phone Number</b>
<b>SP</b>	Nancy Duenas	805.525.3615 x 102
<b>GO</b>	Elizabeth Saucedo	805.964.7878
<b>LM</b>	Dominic Keen	805.875.8789
<b>PR</b>	Karen Christiansen	805.237.3871 x801

<b>SM</b>	Kathy Lambert	805.925.0994
<b>CC</b>	Eric Castro	805.684.4314

## LIBRARY FAX NUMBERS

<b>Jurisdiction</b>	<b>Branch</b>	<b>Fax Number</b>
<b>SP</b>		805.933.2324
<b>SM</b>	Santa Maria (Main)	805.922.2330
	(branches do not have faxes)	
<b>CC</b>	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.

## Koha Notifications and Slips

Notifications and Slips can be found by going to Tools> Notices and Slips. List of custom notices and Slips will appear for your library.

**Notices and slips**

Select a library: Lompoc Library

[+ New notice](#)

Showing 1 to 8 of 8 entries

Search:  [Clear filter](#) [Columns](#) [Export](#) [Configure](#)

Library	Code	Name	Last updated	Copy notice	Actions
Lompoc Library	PREDUE	Advance Notice of Item Due	05/09/2022 10:44	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Lompoc Library	PREDUEDGST	Advance Notice of Item Due (Digest)	05/09/2022 10:44	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Lompoc Library	CHECKINSLIP	Checkin slip	11/23/2022 15:15	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Lompoc Library	HOLD	Hold Available for Pickup	05/19/2022 11:49	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Lompoc Library	HOLD_SLIP	Hold Slip	09/23/2022 14:16	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Lompoc Library	ISSUEQSLIP	Issue Quick Slip_patron barcode only	09/15/2022 13:03	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Lompoc Library	ISSUESLIP	Issue Slip	09/15/2022 12:59	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Lompoc Library	CHECKOUT	Item Check-out (Digest)	05/19/2022 11:06	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>

Showing 1 to 8 of 8 entries

If you select 'All Libraries' under the Select a Library dropdown, it will give a list of all templates available in Koha. You can copy any of the templates into your library page by selecting copy in the Copy Notice column. Be sure you are copying to your library and not someone else's.

Under Black Gold Cooperative Library System is a list of the most popular notices and slips used by Black Gold Libraries.

**Notices and slips**

Select a library: Black Gold Cooperative Library System

[+ New notice](#)

Showing 1 to 11 of 11 entries

Search:  [Clear filter](#) [Columns](#) [Export](#) [Configure](#)

Library	Code	Name	Last updated	Copy notice	Actions
Black Gold Cooperative Library System	PREDUE	Advance Notice of Item Due	04/12/2022 13:09	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Black Gold Cooperative Library System	PREDUEDGST	Advance Notice of Item Due (Digest)	04/12/2022 13:09	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Black Gold Cooperative Library System	CHECKINSLIP	Checkin slip	04/12/2022 13:19	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Black Gold Cooperative Library System	HOLD	Hold Available for Pickup	05/19/2022 12:02	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Black Gold Cooperative Library System	HOLD_SLIP	Hold Slip	09/14/2022 13:32	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Black Gold Cooperative Library System	ILL_PICKUP_READY	ILL request ready for pickup	04/12/2022 15:46	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Black Gold Cooperative Library System	ILL_REQUEST_UNAVAIL	ILL request unavailable	04/12/2022 15:46	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Black Gold Cooperative Library System	ISSUEQSLIP	Issue Quick Slip_patron barcode only	04/12/2022 12:46	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Black Gold Cooperative Library System	ISSUESLIP	Issue Slip	04/19/2022 17:09	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Black Gold Cooperative Library System	AUTO_RENEWALS_DGST	Notification on auto renewals	08/02/2022 23:35	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Black Gold Cooperative Library System	TRANSFERSLIP	Transfer Slip	04/13/2022 12:33	<span>Copy to Black Gold Cooperative Library System</span> <a href="#">Copy</a>	<a href="#">Edit</a> <a href="#">Delete</a>

These can also be copied to your library page and edited.

Notices and slips can be edited by the library to customize language or format. We customized hold slips for libraries during the conversion process last year.

Information for slips and notices can be found under the EMAIL tab. DO NOT TRY TO ADD ALTER ANY OTHER TABS LISTED.

### Modify notice

Save

Cancel

Library: Lompoc Library

Koha module: Holds

Code: HOLD

Name: Hold Available for Pickup Required

Email

Last updated: 05/19/2022 11:49

HTML ☒

message:

Message subject: Hold Available for Pickup at <<branches.branchname>>

Message body:

—BRANCHES—

branches.branchcode  
branches.branchname  
branches.branchaddress1  
branches.branchaddress2  
branches.branchaddress3  
branches.branchzip  
branches.branchcity  
branches.branchstate

Insert →

<h5>Date: <<today>></h5>  
Dear <<borrowers.firstname>> ,  
<br>  
Material you requested is available for pickup at <<branches.branchname>> until  
<<reserves.expirationdate>>. 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="https://tom.blackgold.org/">tom.blackgold.org</a>.  
<br>  
Title: <<biblio.title>><br>  
Author: <<biblio.author>><br>  
Copy: <<items.copynumber>><br>  
Location: <<branches.branchname>>

Unless you are comfortable with HTML, please do not alter any code within the message box. You can alter the text (see highlighted). Black Gold will be happy to make any changes you want to your slips if that is easier for you.

**Black Gold Circulation Matrix**  
(Delivery Cost Matrix in Koha)

From/To	BG	Blanchard	Buellton	Carpinteria	Cataloging	Cuyama	Goleta	Goleta Book Van	Guadalupe	Library Study Center	Lompoc Bookmobile	Lompoc	Los Alamos	Los Olivos	Orcutt	Paso Robles	Santa Maria Bookmobile	Santa Maria	Santa Ynez	Solvang	Village
BG																					
Blanchard			4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
Buellton		5		5	5	5	1	1	5	5	5	5	5	1	5	5	5	5	1	1	5
Carpinteria		4	4		4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
Cataloging																					
Cuyama		6	6	6	6		6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
Goleta		2	1	2	2	2		1	2	2	2	2	2	1	2	2	2	2	1	1	2
Goleta Book Van		6	1	6	6	6	1		6	6	6	6	6	1	6	6	6	6	1	1	6
Guadalupe		5	5	5	5	1	5	5		5	5	5	1	5	1	5	1	1	5	5	5
Library Study Center		6	6	6	6	6	6	6	6		6	6	6	6	6	1	6	6	6	6	6
Lompoc Bookmobile												1									1
Lompoc		3	3	3	3	3	3	3	3	3	1		3	3	3	3	3	3	3	3	1
Los Alamos		5	5	5	5	1	5	5	1	5	5	5		5	1	5	1	1	5	5	5
Los Olivos																					
Orcutt		5	5	5	5	1	5	5	1	5	5	5	1	5		5	1	1	5	5	5
Paso Robles		3	3	3	3	3	3	3	3	1	3	3	3	3	3		3	3	3	3	3
Santa Maria Bookmobile		6	6	6	6	1	6	6	1	6	6	6	1	6	1	6		1	6	6	6
Santa Maria		2	2	2	2	1	2	2	1	2	2	2	1	2	1	2	1		2	2	2
Santa Ynez																					
Solvang		5	1	5	5	5	1	1	5	5	5	5	5	1	5	5	5	5	1		5
Village		5	5	5	5	5	5	5	5	5	1	1	5	5	5	5	5	5	5	5	

#1 From libraries/to libraries in the same jurisdiction -- except Santa Ynez & Los Olivos (only open 1 day/week)

#2 From Main libraries - Big

Santa Maria

Goleta

#3 From Main libraries - Medium

Lompoc

Paso Robles

#4 From Main libraries - Small

Blanchard

Carpinteria

#5 From Small branches

Buellton

Guadalupe

Los Alamos

Orcutt

Solvang

Village

#6 From Twigs

Cuyama

Goleta Book Van

Library Study Center

Santa Maria Bookmobile

Note: No holds can be placed on titles in the Lompoc Bookmobile for non-Lompoc libraries

## Batch patron deletion and anonymization

40 of 40

Select a library : All libraries







This tool allows you to delete patrons and anonymize checkout history. For deleting patrons, any combination of limits can be used. Patrons will not be deleted if they meet one or more of the following conditions:

- They have items currently checked out.
- They have a non-zero account balance.
- They are the guarantor to another patron.
- They are in a patron category of type staff.
- They have permissions assigned to them.

### Delete patrons



☐ Verify you want to delete patrons

Delete patrons who meet the following criteria:

- who have not borrowed since:    (MM/DD/YYYY)
- whose expiration date is before:    (MM/DD/YYYY)
- who have not been connected since:    (MM/DD/YYYY)
- whose patron category is: Any
- who are in patron list:

### Anonymize checkout history

☐ Verify you want to anonymize patron checkout history

- Permanently delete checkout history older than    (MM/DD/YYYY)

Next >>