

# **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. 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 names 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.	ID: Lou Q. Stewart <b>Middle name:</b> Q

Do <b>not</b> type a period.	
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.

PATRON TYPE	EXPIRATION LIMIT
Adult	48 months
Foster	12 months
Homebound	48 months
Institution	48 months
Juvenile	48 months
Teen	48 months
Visitor	3 months
Welcome	3 months
Welcome Child	3 months

## ADDRESS

A valid home address is required for all patrons except for “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 the 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. If mailing address and physical address are different, enter both.

Enter zip code, city, and state.

<b>RULE</b>	<b>Example</b>																								
Enter the street address and apartment number (if applicable), or PO box number.  Use the following abbreviations:																									
<table border="0"> <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	<b>Address:</b> 15 Main St  <b>Address:</b> 123 W 45 St Apt 67  <b>Address:</b> 89 Grand Ave Ste 10  <b>Address:</b> PO Box 333
Apartment	Apt																								
Avenue	Ave																								
Boulevard	Blvd																								
Building	Bldg																								
Circle	Cir																								
Highway	Hwy																								
Lane	Ln																								
Place	Pl																								
Road	Rd																								
Room	Rm																								
Street	St																								
Suite	Ste																								
If a street address includes a compass direction, use N, S, E, W, NE, NW, SE, or SW  If a street name is a numbered street, use the cardinal number only, (without the “-st”, “-nd”, “-rd”, “-th”)	<b>Address:</b> W Main St Apt 4B  <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. 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 \$50 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:

1- 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 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.

## PASSWORD

Will default overnight to the 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. In Koha, this is not a searchable field.

## DATE OF BIRTH

Enter the date of birth, which is required, in the (MM/DD/YYYY) format. If the 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 the notes field is full, refer to the 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 <sup>3</sup>	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	ID & proof of address see below 1	See below 1
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

<sup>1</sup> GV will issue a card with a 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 individuals associated with institutions accepting personal responsibility.

<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.

<sup>3</sup> SP will issue a card with a government-issued ID with a photo and proof of a permanent residential address. SP will mail postcards to patrons who have no other way to verify their mailing address. The return of this card with a recent postmark will be used as proof of address. If the address used is a transitional location, a Welcome card will be issued instead of a permanent card. If the address used is a P.O. Box, mail with a recent postmark is required.

## LIBRARY CARDS

It is a common practice to issue library cards to individuals only, apart from 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 is set at 3 months. These cardholders may place holds and use online services such as Overdrive.

\*Carpinteria and Paso Robles Libraries do not use online registration at this time.

## CARD EXPIRATION

Check is determined by jurisdiction. *See Patron Type table for expiration dates.*



# 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.

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 can be 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. The 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

In general, Patrons are allowed to place up to 20 holds on items. Hotspots are limited to one hold per patron. Libraries of Things hold limits are determined by jurisdiction. For the following patron types the hold limit per account is:

Institution = 99, Library = 30, Elementary = 5.

Held items will be on the hold shelf for 10 open days. **Propose changing it to 7 days.**

### HOLDABLE/NONHOLDABLE PARITY

Non-holdable items at any jurisdiction cannot exceed the number of holdable items.

## 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 reports should be run every day 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 in the Circulation module under “Holds awaiting pickup.”*

*The patron is also contacted to determine if they have the item.*

## Claimed & Missing from Hold shelf Contacts.

JURISDICTION	BRANCH	CONTACT	EMAIL ADDRESS	PHONE #
Goleta	GO	Emery Baty	ebaty@cityofgoleta.org	805.964.7878
Carpinteria	CC	Eric Castro	ericc@carpinteriaca.gov	805.684.4314
Lompoc	LM	Michelle Homsher	M_homsher@ci.lompoc.ca.us	805.875.8784
	LV	Sierra Foster	S_foster@ci.lompoc.ca.us	805.733.3323
Paso Robles	PR	Don Rader	drader@prcity.com	805.237.3871
Santa Maria	MM	Shannon St. Arnaud	sstarnaud@cityofsantamaria.org	805.925.0994x 1684
Santa Paula	SP	Nancy Duenas	nancy.duenas@blanchardlibrary.org	525.3615x 102

## RENEWAL LIMITS

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.

As a general rule, patrons are allowed 3 autorenewals unless a hold is placed on an item.

### Renewal limits by Item type

<b>TYPE</b>	<b>SP</b>	<b>LM<sup>3</sup></b>	<b>PR</b>	<b>SM</b>	<b>GV</b>	<b>CC</b>
Audio*	3	3	3	3	3	3
Blu-ray/Blu-ray Set	3	3	3	3	3	n/a
Books	3	3	3	3	3	3
Book Club Kit	0	0	0	0	0	0
DVD/DVDS ET	3	3	3	3	3	1
Hotspots	0	0	0	0	0	0
ILL – out of system	contact original library	n/a	contact original library	contact original library	contact original library	n/a
Library of Things	0	0	0	0	3	0
Passes	3	0	n/a	n/a	n/a	0
Periodicals	3	n/a	3	no	3	3
Read Along	3	3	3	3	3	3
Reference/Special Loans	case by case	case by case	case by case	no	n/a	In-house use only
Laptops	0	0	0	0	n/a	0
Connectivity Kits	0	0	n/a	0	n/a	0
*Audio includes CDs (music), Books on Tape, Cassettes, Books on CD, Read Along 3 Lompoc Bookmobile items have a renewal of 1.						

## LOAN PERIODS BY ITEM TYPE BY BRANCH

As a general rule, the loan period for most materials is 21 days, exceptions listed below.

<b>TYPE</b>	<b>SP</b>	<b>LM</b>	<b>PR</b>	<b>SM</b>	<b>GV</b>	<b>CC</b>
Audio <sup>1</sup>	21	21	21	21	21	21
Book	21	21	21	21	21	21
Book Club Kit	42	42	42	42	42	42
Connectivity Kit <sup>4</sup>	21	7	n/a	7	n/a	7
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
Hotspots <sup>3</sup>	7	7	7	7	7	7
Laptop	In-house	In-house	7	7	n/a	7 hours in-house
Library of Things	21	7	n/a	21	21	7
Passes	21	7	21	7	21 <sup>2</sup>	7
Playaway	n/a	n/a	21	7	21	n/a
Periodicals	7	n/a	21	21	21	21
Reference/Special Loans	0 or 7	0	case by case	case by case	Case by case	0
Special Loan		7	42			7
Tablet	21	n/a				n/a
Uncatalogued Paperback	no limit	n/a	n/a	21	No limit	No limit

<sup>1</sup>Audio includes Book on CD, Book on Tape, Cassette, CD  
<sup>2</sup>Moxi passes = 7 days  
<sup>3</sup>No loans to "internet only" patron type (all); No loans to "Juvenile – no internet" patron type (PR)  
<sup>4</sup>No loans to "Welcome" patron types.

### 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, Uncatalogued (short title entries)

Juvenile: Cataloged, Uncatalogued, 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 Override Renewal Restrictions, Renewal Due Date or any other Koha function to extend due dates for items checked out to self, other staff members, or the public without noted approval by a supervisor. Changing a due date inappropriately may result in disciplinary action.

## EXCEPTIONS TO OVERRIDES FOR HOLDS

1. 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.
2. Staff should be sure to reactivate the hold request so that the patron remains at the top of the holds queue. Select checkout option. Do not cancel hold.

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

There is no common practice concerning the maximum number of items allowed to be checked out. Current maximum limits are listed in the following table.

TYPE	SP	LM	PR	SM	GV	CC
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 <sup>1</sup>	5	no limit	50	50	n/a	n/a
Hotspots <sup>2</sup>	1	1	1	1	1	1
Library of Things	1	1	1	1	3	3
Pamphlets/Vertical Files	no limit	n/a	50	n/a	99	n/a
Passes	1	1	1	1	1	1
Periodicals (same title)	10	n/a	50	50	99	6
Periodicals (total)	10	n/a	50	50	99	6
Videos	n/a	n/a	50	n/a	n/a	n/a
Connectivity Kit <sup>2</sup>	1	1	n/a	1	n/a	1

<sup>1</sup> LM, SP – Encyclopedias that are part of reference do not circulate.  
<sup>2</sup> SP – 3-month waiting period for new library card holders. LM 6 month waiting period for LoT, Moxi passes, hotspots, connectivity kits.



Juvenile DVD	30.00	20.00		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	700.00	800.00	List price	n/a	300.00
Lease Book Fiction	35.00	n/a	n/a	n/a	n/a	n/a
Lease Book Non-fiction	40.00	n/a	n/a	n/a	n/a	n/a
Library of Things	Actual Cost	Case by case	n/a	List price	Actual Cost	Actual Cost
Pamphlets	n/a	n/a	5.00	n/a	n/a	n/a
Paperbacks Chargeable	10.00	10.00	15.00	10.00	n/a	n/a
Periodicals	8.00	n/a	9.00	8.00	8.00	10.00
Read Along/VOX	n/a	50.00	n/a	20.00	n/a	n/a
Reference	60.00	60.00	43.00	60.00	62.00	60.001
Trade Paperback	n/a	20.00	n/a	n/a	n/a	n/a
Video Games	n/a	n/a	n/a	n/a	n/a	50.00
Juvenile BkCD	10.00 disc. 50.00 set	50.00	50.00	50.00		
Juvenile BK + CD	30.00	n/a	25.00			
Book Club Kit	180.00	200.00 or 20.00 per book	180.00	180.00		

<sup>1</sup> Or list price

<sup>2</sup> Standard practices to not offer refund after 6 months for PR, 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> PR & SP charges \$10.00 processing fee for items replaced by patrons.

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





## BLACK GOLD FEES AND CHARGES

	SP	LM	PR	SM	GV	CC
Microfilm Requests	n/a	n/a	2.00/roll	n/a	n/a	n/a
Replacing Cards	1.00 <sup>1</sup>	2.00	1.00	1.00	2.00	1.00
Requests – out of system	Case by case	n/a	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
<sup>1</sup> 1 <sup>st</sup> 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 (Needs Review)

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'.

## 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	St. Arnaud, Shannon	805.925.0994	1684	<a href="mailto:sstarnaud@cityofsantamaria.org">sstarnaud@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	Castro, 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:

<b>IF ITEM IS NOT CHECKED IN:</b>	
<b>IF PATRON IS PRESENT:</b>	<b>IF PATRON IS NOT PRESENT:</b>
<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> <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>• 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 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 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 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. Staff will look for it for over 3 months. Patron will be charged if not found after 3 months.
- 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	90 days	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.



## KOHA - NOTICES

Customized Notices								
Notice	Description	BG	CC	GV	LM	PR	SM	SP
MEMBERSHIP EXPIRY	Account expiration	Default Templates						
PREDUE	Advanced notice of item due							
PREDUE (DIGEST)	All Items Due (advanced)							
CHECKIN SLIP	Check-in slip							
HOLD AVAILABLE	Hold available for pick-up							
HOLD AVAILABLE (DIGEST)	All items available for pick-up							
HOLD CANCELLATION	Hold cancelled							
HOLD CANCELLATION - LOST	Hold cancelled – marked as Lost							
HOLD SLIP	Hold slip							
HOLD WAITING	Holding waiting pick up							
ISSUE -QUICKSLIP	Issue slip barcode only							
ISSUE SLIP	Issue slip							
CHECKOUT (DIGEST)	Complete list of items checked out							
DUE	Item due reminder							
DUEDGST	All items due							
ITEM RENEWAL	Item renewed							
AUTO_RENEWALS	Item auto renewed							
PASSWORD CHANGE	Notice of password change							
AUTO RENEWAL DIGEST	All items auto renewed							
ODUE	Overdue notice							
ODUE 2	2 <sup>nd</sup> Overdue notice							
WELCOME	New account notice							
TRANSFER SLIP*	Transfer slip			X	X	X	X	X
ODUE 3**	Billing notice							

\*Transfer slips are unique to each library. \*\*Print notice administered by 3rd party.

## BEST PRACTICES: Always use the copy feature when customizing notices and/or text alerts.

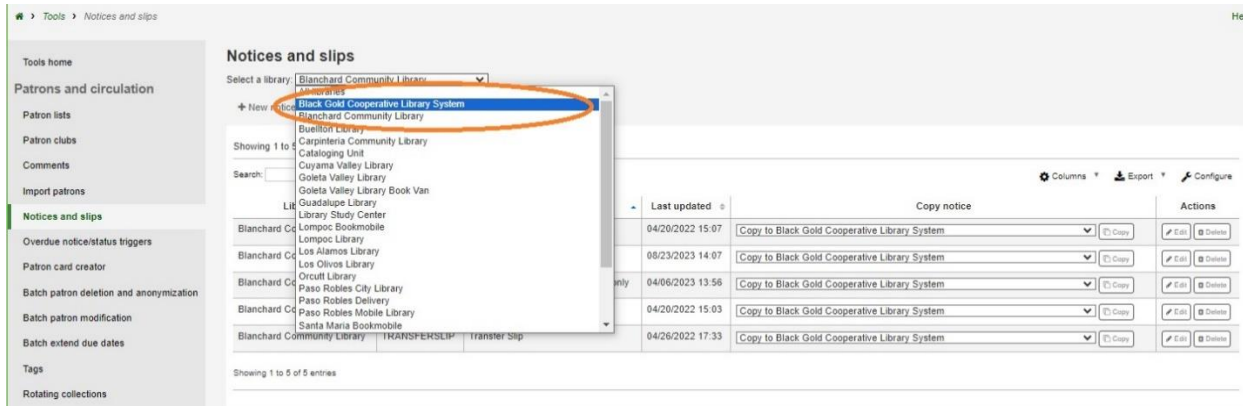
- Available templates can be found under Tools>Notices and Slips>Select a library: Black Gold Cooperative Library System.
- Select your library under the “Copy notice” column.
- Click ‘Email’ to customize notice emails and slips.
- Click ‘SMS’ for text alerts, if available.
- Click ‘Save’ once all changes have been made.
- Your customized notices will be available under your library tab.

### INSTRUCTIONS FOR COPYING NOTICES FOR CUSTOMIZATION

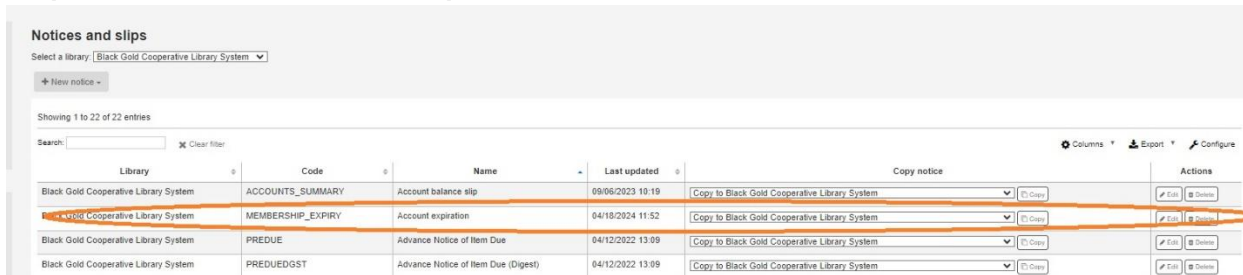
#### WARNING:

**DO NOT ALTER A NOTICE BEFORE COPYING IT OVER TO YOUR LIBRARY NOTICES AND SLIPS PAGE!**

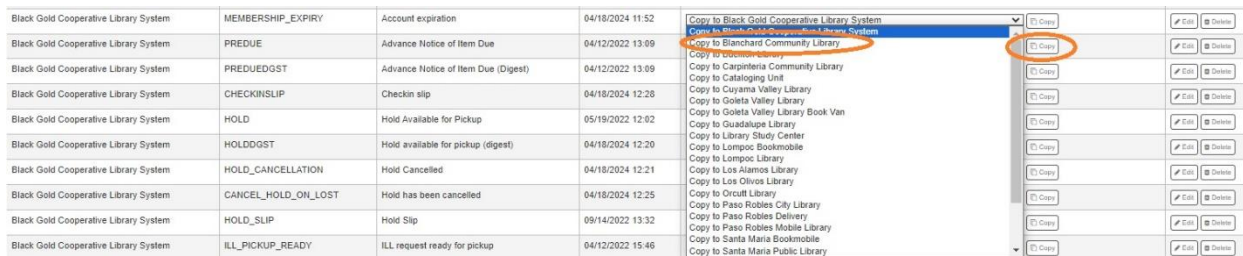
**Step 1: Go to Tools > Notices and Slips in Koha. Choose Black Gold Cooperative Library from the 'Select a Library' drop down menu:**



**Step 2: Select the Notice to be copied.**



**Choose your library branch from the drop menu in the Copy Notice column. Click the copy button to move the item.**



**Step 3: Verify you are in your library. Edit the notice as needed. Note: You can change the name of the notice, but not the code.**

The screenshot shows the 'Add notice' interface. At the top, there are 'Save' and 'Cancel' buttons. The 'Library' field is set to 'Blanchard Community Library'. The 'Koha module' is 'Patrons'. The 'Code' is 'MEMBERSHIP\_EXPIRY'. The 'Name' field contains 'Account expiration'. The 'Email' section is expanded, showing 'Last updated: 04/18/2024 11:52'. There is an 'HTML' checkbox. The 'message' field contains the following text: 'Dear <<borrowers.title>> <<borrowers.firstname>> <<borrowers.surname>> Your library card will expire soon, on: <<borrowers.dateexpiry>> Thank you, Librarian <<branches.branchname>>'. The 'subject' field contains 'Account expiration'. On the left, there is a list of variables: '--BRANCHES--', 'branches.branchcode', 'branches.branchname', 'branches.branchaddress1', 'branches.branchaddress2', 'branches.branchaddress3', 'branches.branchzip', 'branches.branchcity', and 'branches.branchstate'.

**Click save. The notice will then be listed under Notice and Slips for your library.**

**HELPFUL HINT:** If you make an error, you can go back and copy the template into your library list. Koha will ask if you want to save over the first draft before saving.



---

## **NOTICE TEMPLATES** (Coding language is printed in **TEAL**)

---

### **MEMBERSHIP EXPIRY** - Account expiration.

Dear <<*borrowers.title*>> <<*borrowers.firstname*>> <<*borrowers.surname*>>,

Your library card will expire soon, on:

<<*borrowers.dateexpiry*>>

Please visit your library before this date to renew your card.

Thank you,

Librarian

<<*branches.branchname*>>

### **PREDUE** - Advance notice of item due.

Dear <<*borrowers.firstname*>>,

The following items are due back to the library on the dates indicated. Please return these items prior to the due date.

<<*items.content*>>

<<*branches.branchname*>>

<<*branches.branchaddress1*>>

<<*branches.branchcity*>>,<<*branches.branchstate*>> <<*branches.branchzip*>>

<<*branches.branchphone*>>

**SMS**- Library items checked out to you will be due soon. Contact the library or check your account online.

<<*branches.branchname*>>

**PREDUE (DIGEST)** – Advance notice of all items due.

Dear <<borrowers.firstname>> ,

The following items are due back to the library on the dates indicated. Please return these items prior to the due date.

<<items.content>>

<<branches.branchname>>

<<branches.branchaddress1>>

<<branches.branchcity>>, <<branches.branchstate>> <<branches.branchzip>>

<<branches.branchphone>>

<<branches.branchurl>>

**SMS** - Library items checked out to you will be due soon. Contact the library or check your account online.

<<branches.branchname>>

**HOLD AVAILABLE** – Hold available for pickup.

<h5>Date: <<today>></h5>

Dear <<borrowers.firstname>> ,

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 <<branches.branchurl>> .

Title: <<biblio.title>>

Author: <<biblio.author>>

Copy: <<items.copynumber>>

Location: <<branches.branchname>>

<<branches.branchaddress1>>

<<branches.branchcity>> <<branches.branchzip>>

**SMS** - You may pickup <<biblio.title>> at <<branches.branchname>> until <<reserves.expirationdate>>.

**HOLD AVAILABLE (DIGEST)** – All holds available for pickup.

You have one or more holds available for pickup:

----

Title: [% hold.biblio.title %]

Author: [% hold.biblio.author %]

Copy: [% hold.item.copynumber %]

Location: [% hold.branch.branchname %]

Waiting since: [% hold.waitingdate %]

Waiting at: [%hold.branch.branchname%]

[% hold.branch.branchaddress1 %]

[% hold.branch.branchaddress2 %]

[% hold.branch.branchaddress3 %]

[% hold.branch.branchcity %] [% hold.branch.branchzip %]

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 <<branches.branchurl>> .

----

**SMS** - You have one or more holds available for pickup:

----

[% hold.biblio.title %]

**HOLD WAITING** – Holds waiting over xx days.

Dear [% borrower.firstname %] ,

The following holds are ready for pickup at [% branch.branchname %]:

[% FOREACH hold IN holds %]

  [% hold.biblio.title %]

[% END %]

Your hold will expire soon.

**HOLD CANCELLATION LOST** – Hold cancelled because item has been marked as Lost.

Dear [% borrower.firstname %] [% borrower.surname %],

We regret to inform you the following item is no longer available. Your hold has been cancelled.

Title: [% biblio.title %]

Author: [% biblio.author %]

Copy: [% item.copynumber %]

Location: [% branch.branchname %]

Contact your library for more information.

**HOLD CANCELLATION** – Hold cancelled.

Dear [% borrower.firstname %] [% borrower.surname %],

We regret to inform you the following item is no longer available. Your hold has been cancelled.

Title: [% biblio.title %]

Author: [% biblio.author %]

Copy: [% item.copynumber %]

Location: [% branch.branchname %]

Contact your library for more information.

**SMS** - Your request has been cancelled for title: <<biblio.title>>.

**HOLD SLIP** – Hold slip.

```

<h5>Date: <<today>></h5>
<h3> Transfer to/Hold in <<branches.branchname>></h3>
<h3><<borrowers.surname>>, <<borrowers.firstname>></h3>
<ul>
  <li><<borrowers.cardnumber>></li>
</ul>
<br />
<h3>ITEM ON HOLD</h3>
<h4><<biblio.title>></h4>
<h5><<biblio.author>></h5>
<ul>
  <li><<items.barcode>></li>
  <li><<items.itemcallnumber>></li>
  <li><<reserves.waitingdate>></li>
</ul>
<p>Notes:
<pre><<reserves.reservenotes>></pre>
</p>

```

**ISSUE QUICKSLIP** – Issue quick slip (patron barcode only.)

```

<style> h1 {font-family:"arial", Helvetica,sans-serif;
font-size: 125%; }
h3 {font-family:"arial", Helvetica,sans-serif;
font-size: 100%; }
h4 {font-family:"arial", Helvetica,sans-serif;
font-size: 100%; }
p {font-family:"arial", Helvetica,sans-serif;
font-size: 100%; } </style>

```

```

<h1><<branches.branchname>>
Checked out to <br />
<<borrowers.cardnumber>> <br />

```

```

<<today>><br /></h1>

```

```

<h4>Checked Out Today</h4>
<checkedout>
<p>
<<biblio.title>> <br />
Barcode: <<items.barcode>><br />
Date due: <<issues.date_due>><br />

</checkedout></p>

```

**ISSUE SLIP** – Issue slip.

```

<style>
h1 {font-family:"arial", Helvetica,sans-serif;
font-size: 125%; }
h3 {font-family:"arial", Helvetica,sans-serif;
font-size: 100%; }
h4 {font-family:"arial", Helvetica,sans-serif;
font-size: 100%;}
p {font-family:"arial", Helvetica,sans-serif;
font-size: 100%;}
</style>

```

```

<h1><<branches.branchname>><br>
Checked out to <br />
<<borrowers.cardnumber>> <br />

```

```

<<today>><br /></h1>

```

```

<h3>Checked Out</h3>
<checkedout>
<h1>
<<biblio.title>></h1>
<p>
Barcode: <<items.barcode>><br />
Date due: <<issues.date_due>><br />

```

```

</checkedout></p>

```

```

<h4>Overdues</h4>
<overdue>
<p>
<<biblio.title>> <br />
Barcode: <<items.barcode>><br />
Date due: <<issues.date_due>><br />
</p>
</overdue>

```

```

<hr>

```

**CHECKIN SLIP** – Check-in slip.

```

<style>
h4 {font-family:"arial", Helvetica,sans-serif;
font-size: 100%;}
h5 {font-family:"arial", Helvetica,sans-serif;
font-size: 100%;}
</style>

```

```

<h5>Date: <<today>></h5>
<h4>Items checked in today:

```

```

<<biblio.title>>
<<biblio.author>>
<<items.barcode>>

```

```

<<branches.branchname>>
<<branches.branchurl>>
<<branches.branchphone>></h4>

```

**SMS** - Date: <<today>>  
Items checked in today: <<biblio.title>>, <<biblio.author>>, <<items.barcode>>

**CHECKOUT (DIGEST)** – List of items checked out.

The following items have been checked out:

```

----
Title: <<biblio.title>>
Date due: <<issues.date_due>>
----

```

Thank you for visiting <<branches.branchname>>.

**SMS** - The following items have been checked out:

```

----
Title:<<biblio.title>>
Date due: <<issues.date_due>>
----

```

Thank you for visiting <<branches.branchname>>.

**ITEM DUE (DIGEST)** - List of items due.

Dear <<borrowers.firstname>>,

The following item(s) are due today: Please return these items as soon as possible.

<<items.content>>

<<branches.branchname>>

<<branches.branchaddress1>>

<<branches.branchcity>>, <<branches.branchstate>> <<branches.branchzip>>

<<branches.branchphone>>

<<branches.branchurl>>

Please do not reply to this email. You will not receive a response.

**SMS** - You have an item/s due at the library. Please call the library or check your account at

<<branches.branchurl>>.

<<branches.branchname>>

**WELCOME** – Welcome email for new patrons.

[% USE Koha %]

Hello [% borrower.title %] [% borrower.firstname %] [% borrower.surname %] .

Thank you for joining [% IF Koha.Preference('LibraryName') %][% Koha.Preference('LibraryName') %][% ELSE %]the library[% END %]

You can search for all our materials in our [catalog](https://blackgold.org/). \*

Your library card number is [% borrower.cardnumber %]

If you have any problems or questions regarding your account, please contact the library.

*\*Replace [https://blackgold.org](https://blackgold.org/) with home library URL.*



**AUTO RENEWAL (DIGEST)** – Notification of auto renewals

Dear [% borrower.firstname %] ,

[% IF error %]

There were [% error %] items that were not renewed. Please return them when due.

[% END %]

[% IF success %]

There were [% success %] items that were renewed. Please note the new due dates.

[% END %]

[% FOREACH checkout IN checkouts %]

[% checkout.item.biblio.title %] : [% checkout.item.barcode %]

[% IF !checkout.auto\_renew\_error %]

was renewed until [% checkout.date\_due | \$KohaDates as\_due\_date => 1%]

[% ELSIF checkout.auto\_renew\_error == 'too\_many' %]

You have reached the maximum number of renewals possible.

[% ELSIF checkout.auto\_renew\_error == 'on\_reserve' %]

This item is on hold for another patron.

[% ELSIF checkout.auto\_renew\_error == 'restriction' %]

You are currently restricted.

[% ELSIF checkout.auto\_renew\_error == 'overdue' %]

You have overdue items.

[% ELSIF checkout.auto\_renew\_error == 'auto\_too\_late' %]

It's too late to renew this item.

[% ELSIF checkout.auto\_renew\_error == 'auto\_too\_much\_oweing' %]

Your total unpaid fines are too high.

[% ELSIF checkout.auto\_renew\_error == 'too\_unseen' %]

This item must be renewed at the library.

[% END %]

[% END %]

## OVERDUE NOTICE AND BILLING CYCLE

3 Days after due date	<b>First Overdue Notice (ODUE)</b> – See Default Template
17 Days after due date	<b>Second Overdue Notice (ODUE2)</b> – See Default template
The patron account goes to Unique when \$40 in fines/fees have accumulated and the fines/fees have 'aged' 30 days. Submission to collections is based on the item's owning branch.	
30 Days after due date	<b>Library Materials Bill (ODUE3)</b> – See Example Letters

- Overdue and Bill Notices are sent using the 'lending library' address.
- Fine notices are sent using the patron's registered library.
- Phone notices are sent:
  - Monday – Friday: 9:30 am – 6:00 pm (3 attempts)
  - Saturday: 10 am – 6:00 pm (1 attempts)
- 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
- 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 (3 attempts made), 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.

---

**HELPFUL HINT:** Encourage patrons to use email or text notifications methods!

**ODUE** – 1<sup>st</sup> Overdue notice

Dear <<borrowers.firstname>> ,

According to our current records, you have items that are overdue. Please return or renew them at the branch below as soon as possible.

<<branches.branchname>>

<<branches.branchaddress1>>

<<branches.branchaddress2>> <<branches.branchaddress3>>

Phone: <<branches.branchphone>>

Email: <<branches.branchemail>>

Please renew your account online <<branches.branchurl>> . Please do not reply to this email. You will not receive a response.

The following item(s) is/are currently overdue:

<item>"<<biblio.title>>" by <<biblio.author>>, <<items.itemcallnumber>>, Barcode:  
<<items.barcode>> Fine: <<items.fine>></item>

Thank-you for your prompt attention to this matter.

<<branches.branchname>> Staff

**SMS** - Library items are overdue. Please call the library or check your account on line  
<<branches.branchurl>>

**ODUE2** – 2<sup>nd</sup> Overdue notice

<h5>Date: <<today>></h5>

Dear <<borrowers.firstname>> ,

According to our current records, you have items that are overdue. Please return or renew them at the branch below as soon as possible.

<<branches.branchname>>

<<branches.branchaddress1>>

<<branches.branchaddress2>> <<branches.branchaddress3>>

Phone: <<branches.branchphone>>

Fax: <<branches.branchfax>>

Email: <<branches.branchemail>>

Please review your account online. <<branches.branchurl>> . Please do not reply to this email. You will not receive a response.

The following item(s) is/are currently overdue:

<item>"<<biblio.title>>" by <<biblio.author>> , <<items.itemcallnumber>> , Barcode:  
<<items.barcode>> Fine: <<items.fine>></item>

Thank-you for your prompt attention to this matter.

<<branches.branchname>> Staff

**SMS** - Library items are overdue. Please call the library or check your account on line

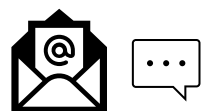
<<branches.branchurl>>



## Koha Process

### Timeline on Emails, SMS and Unique Handoff

Day 3



ODue

SMS/Email

Day 17



ODue2

SMS/Email

Day 31



ODue3

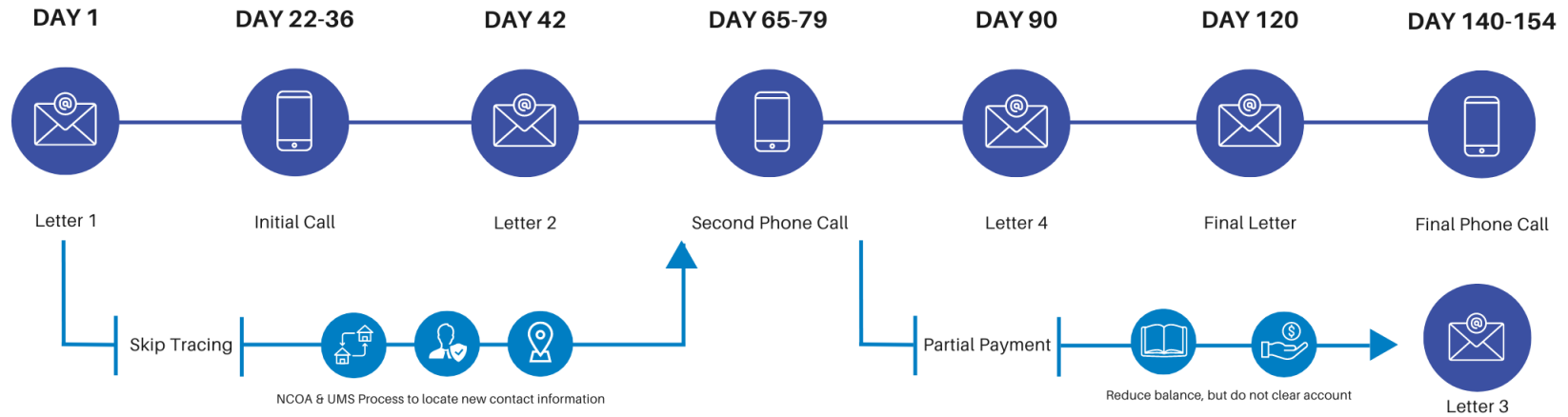
Unique - Print





### UNIQUE PROCESS

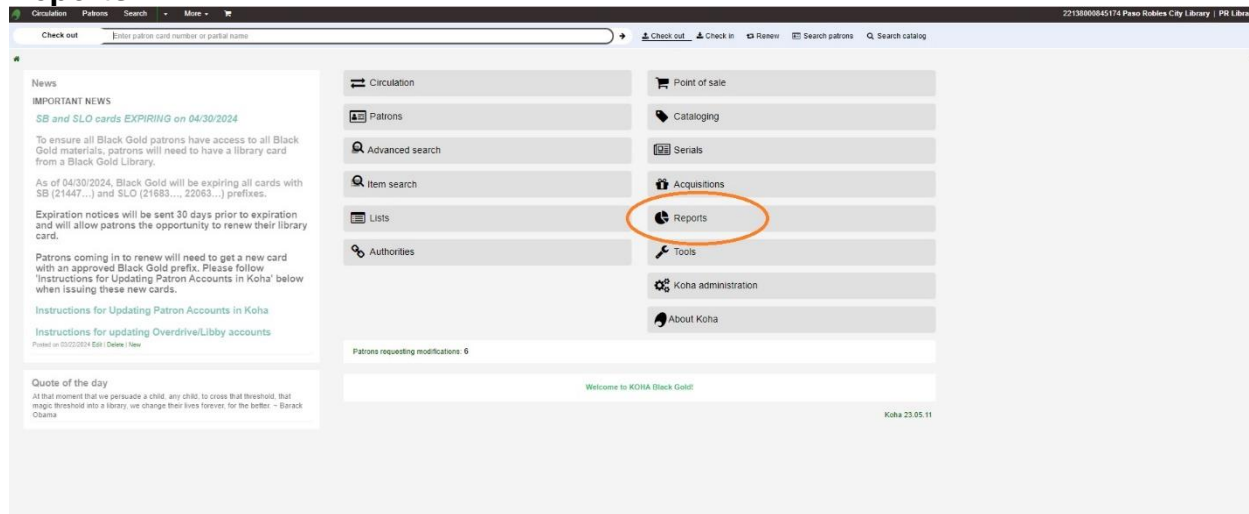
Timeline of Emails, Letters, and Phone Calls



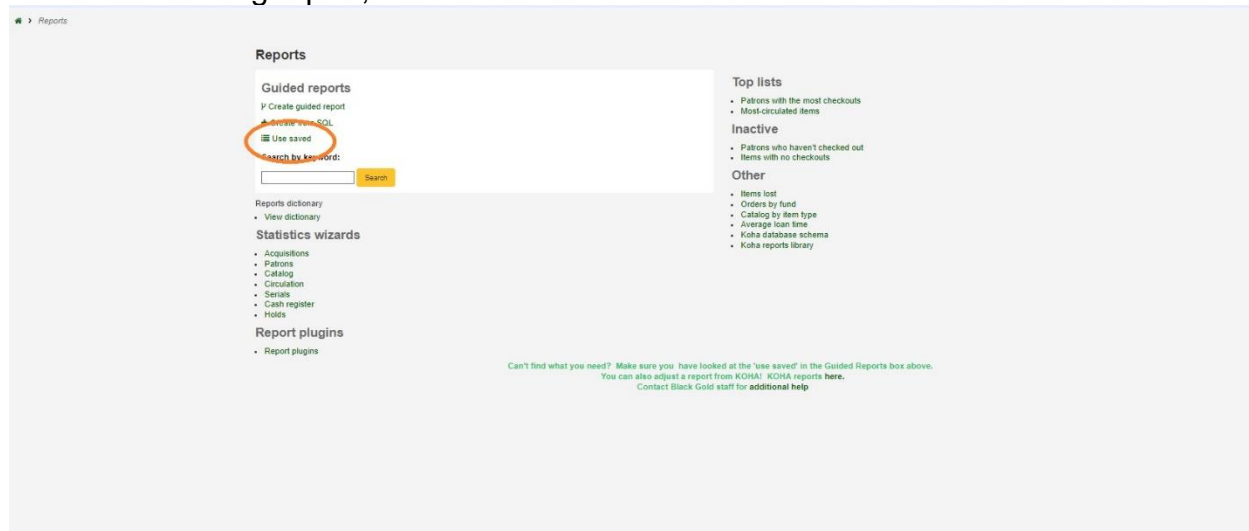
# KOHA REPORTS

## BEST PRACTICES

To access reports in Koha, start by navigating to the Home page and selecting **Reports**.



To use an existing report, click on **Use saved**.



This will take you to the Saved Reports page, where all available reports can be found under the **All** tab.

The screenshot shows the 'Saved reports' interface. At the top, there is a navigation bar with tabs for 'All', 'Accounts', 'Acquisitions', 'Authorities', 'Black Gold', 'Blanchard', 'Carpenteria', 'Catalog', 'Cataloging', 'Circulation', 'Goleta', 'Lompoc', 'Notices', 'Paso Robles', 'Patrons', 'Santa Maria', 'Serials', and 'test'. The 'All' tab is highlighted and circled in red. Below the tabs, there is a search bar and a table of reports. The table has columns for ID, Report name, Type, Group, Notes, Author, Creation date, Last edit, Last run, Update, and Actions. Several reports are listed, including 'Count of patrons whose cards will expire after a specific date, group by category' and 'Checkouts & Renewals in Date Range'.

If you find a report that you like and plan to use frequently, it's best to duplicate it and assign the duplicated report to your library's Report Group.

This screenshot shows the 'Saved reports' page with a red circle around the 'Previous Month's Circ Stats' report in the table. A second red circle highlights the 'Duplicate' button in the 'Actions' column for that report. The interface includes a filter sidebar on the left and a top navigation bar with various library-specific tabs.

This screenshot shows the 'Saved reports' page after a report has been duplicated. A new report entry is visible at the top of the table, with a unique ID and a 'Created' date. The 'Duplicate' button in the actions menu is circled in red, indicating the action taken to create this new report.

Duplicating the report creates a new report with a unique identification number.



You can then edit the report's name, description, and SQL code if needed. Any changes made to this duplicate report will not affect the original version.

Both the original and the new report will appear under the **All** tab, and the new report will also appear under your library's tab if you set your library as the Report Group.

**Important:** If you modify a report without duplicating it first, you will be altering the original report. This can lead to unintended consequences for other libraries that may rely on that report, as any changes will affect their version as well.

If you already know the report number or name, you can quickly access it by entering this information in the **Search by keyword** field on the **Reports** page.

The screenshot shows the Koha Reports page. The navigation bar includes 'Circulation', 'Patrons', 'Search', and 'More'. Below the navigation bar, there is a search bar with the placeholder text 'Enter patron card number or partial name'. The main content area is titled 'Reports' and contains several sections: 'Guided reports' (with options to 'Create guided report' and 'Create from SQL'), 'Search by keyword:' (with a text input field containing '639' and a 'Search' button, circled in orange), 'Reports dictionary' (with a 'View dictionary' link), 'Statistics wizards' (with a list of categories: Acquisitions, Patrons, Catalog, Circulation, Serials, Cash register, Holds), and 'Report plugins' (with a 'Report plugins' link). On the right side, there are sections for 'Top lists' (with links to 'Patrons with the most checkouts' and 'Most-circulated items'), 'Inactive' (with links to 'Patrons who haven't checked out' and 'Items with no checkouts'), and 'Other' (with links to 'Items lost', 'Orders by fund', 'Catalog by item type', 'Average loan time', 'Koha database schema', and 'Koha reports library'). At the bottom of the page, there is a green message: 'Can't find what you need? Make sure you have looked at the 'use saved' in the Guided Reports box above. You can also adjust a report from KOHA! KOHA reports here. Contact Black Gold staff for additional help.'

You are also welcome to create your own reports in Koha. **Be sure to save any new reports under your Library tab.**

If you need a specific report but are unable to create it yourself, please contact the Black Gold office, and they will assist you in creating the report.

## DELIVERY

### BLACK GOLD DELIVERY

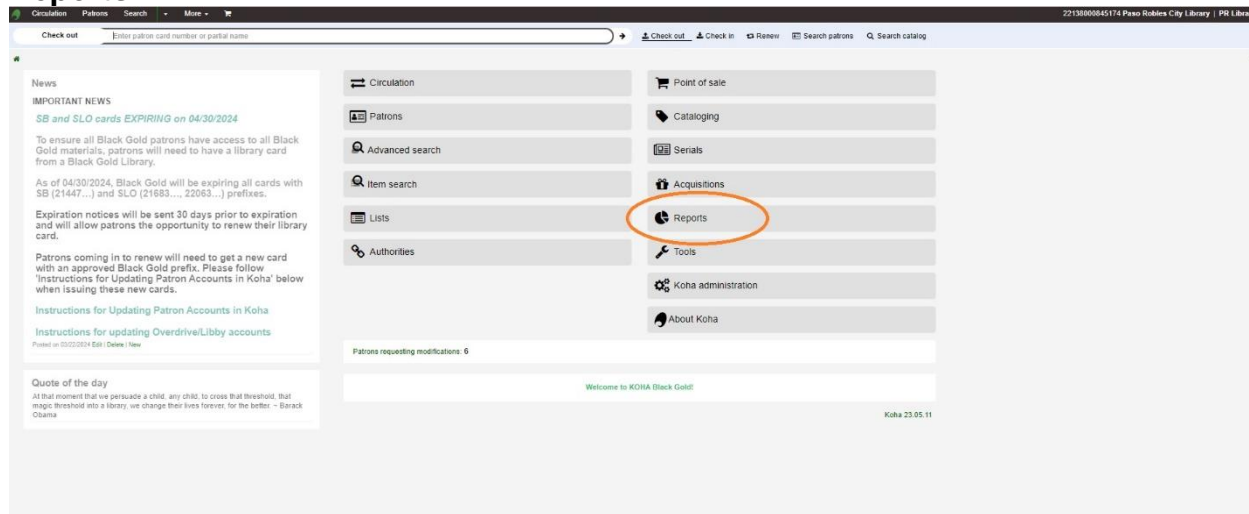
Currently, Black Gold runs a single round trip delivery schedule, Tuesdays and Fridays, to all the main library member jurisdictions and to Black Gold headquarters. Holiday week scheduling is determined based on library hours and availability of the contracted driver.

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. Contact Kristina Uvalle ([kuvalle@blackgold.org](mailto:kuvalle@blackgold.org)) with any questions or concerns.

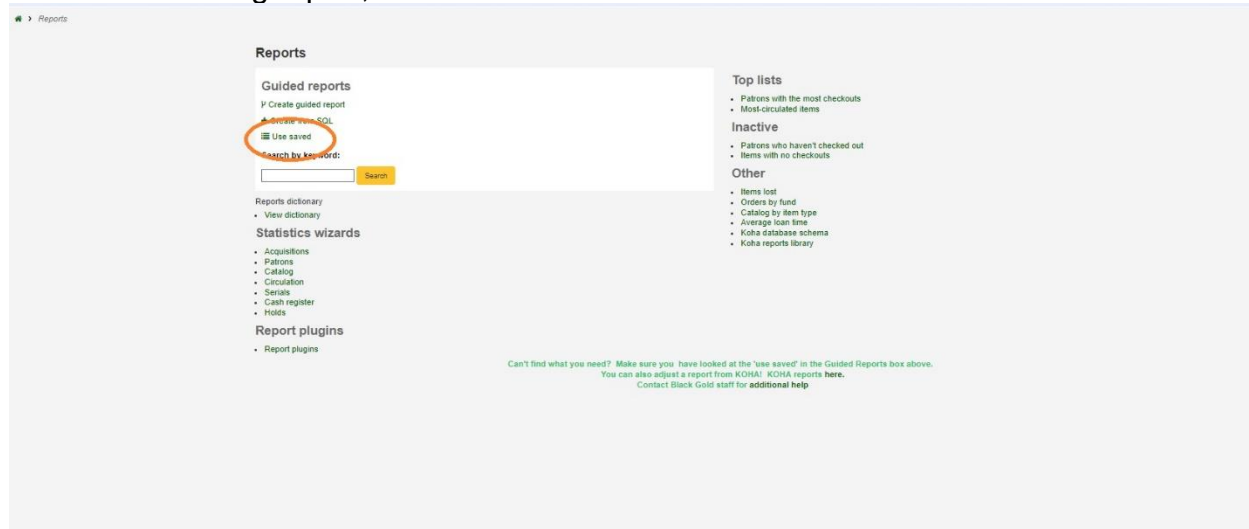
# KOHA REPORTS

## BEST PRACTICES

To access reports in Koha, start by navigating to the Home page and selecting **Reports**.



To use an existing report, click on **Use saved**.



This will take you to the Saved Reports page, where all available reports can be found under the **All** tab.

+ New report -  
**Saved reports**  
 All Accounts Acquisitions Authorities Black Gold Blanchard Carpinteria Catalog Cataloging Circulation Goleta Lompoc Notices Paso Robles Patrons Santa Maria Serials Test  
 Subgroup: All  
 Showing 1 to 614 of 614 entries  
 Show: All entries < First < Previous Next > Last > Search: [ ] X Clear filter  
 Columns Export Configure

ID	Report name	Type	Group	Notes	Author	Creation date	Last edit	Last run	Update	Actions
2	Count of patrons whose cards will expire after a specific date, group by category	Patrons	Developer: E. Guertin Module: Patrons Purpose: Count of patrons with valid card at a specific date (expiration after a specific date), count by patron category. Status: Complete	(0)	11/03/2017	02/22/2024 10:44	05/06/2024 10:03			Run
3	Checkouts & Renewals in Date Range	Circulation	Developer: Nicole C. Engard. ByWater Solutions Module: Circ Purpose: Asks for date range and shows you the checkouts and renewals Status: Complete	(0)	11/03/2017	03/23/2022 09:28	01/23/2024 17:38			Run
4	Previous Day's Circ Stats	Circulation	Developer: Jane Wagner, PTFS Module: Circ Purpose: Status: Complete	(0)	11/03/2017	11/03/2017 10:27	06/25/2024 15:09			Run
5	Previous Month's Circ Stats	Circulation	Developer: Jane Wagner, PTFS Module: Circ Purpose: Status: Complete	(0)	11/03/2017	11/03/2017 10:28	07/03/2024 15:11			Run
6	COUNT - Month wise circulation report for a specific year	Circulation	Developer: (1) Saliha MV - Govt. Engineering College Library, Hassan (2) Barton Chittenden (3) Mark Alexander Module: Circulation Purpose: Status: Complete	(0)	11/03/2017	11/03/2017 10:53	03/10/2023 13:52			Run
7	Count of items by branch, then by item type	Catalog	Developer: Pablo Bianchi Module: Catalog Status: Complete	(0)	11/03/2017	11/03/2017 10:55	06/10/2024 15:52			Run
8	Count of New Bib Records between dates	Catalog	Developer: Nicole C. Engard. ByWater Solutions Module: Catalog Purpose: Count new bibs in specific time frame Status: Complete	(0)	11/03/2017	04/25/2022 11:26	05/20/2022 11:34			Run
9	Count of new items added to the catalog	Catalog	Developer: Nicole C. Engard. ByWater Solutions Module: Catalog Purpose: Count new items between specific dates Status: Complete	(0)	11/03/2017	06/07/2019 07:40	07/06/2023 10:33			Run
10	Bibs with no items	Catalog	Developer: Nicole C. Engard. ByWater Solutions Module: Catalog Purpose: All bibs without items where the last item was deleted Status: Complete	(0)	11/03/2017	03/23/2022 14:21	10/05/2023 13:58			Run
12	Duplicate ISBNs	Catalog	Developer: Jared Camins-Esakov. ByWater Solutions Module: Catalog Purpose: Show records with	(0)	11/03/2017	06/07/2019 07:02/2024				Run

If you find a report that you like and plan to use frequently, it's best to duplicate it and assign the duplicated report to your library's Report Group.

Filter  
 Date: [ ]  
 (MM/DD/YYYY)  
 Author: [ ]  
 Keyword: [ ]  
 Apply filter Clear  
 Run reports  
 Saved reports  
 Reports dictionary  
 View dictionary  
 Useful resources  
 Koha report library  
 Koha database schema

+ New report -  
**Saved reports**  
 All Accounts Acquisitions Authorities Black Gold Blanchard Carpinteria Catalog Cataloging Circulation Goleta Lompoc Notices Paso Robles Patrons Santa Maria Serials Test  
 Showing 1 to 614 of 614 entries  
 Show: All entries < First < Previous Next > Last > Search: [ ] X Clear filter  
 Columns Export Configure

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12	Duplicate ISBNs	Catalog	Developer: Jared Camins-Esakov. ByWater Solutions Module: Catalog Purpose: Show records with duplicate ISBNs download for full list (doesn't paginate) Status: Completed	(0)	11/03/2017	06/07/2019 07:02/2024 12:14					Run

Filter  
 Date: [ ]  
 (MM/DD/YYYY)  
 Author: [ ]  
 Keyword: [ ]  
 Apply filter Clear  
 Run reports  
 Saved reports  
 Reports dictionary  
 View dictionary  
 Useful resources  
 Koha report library  
 Koha database schema

+ New report -  
**Saved reports**  
 All Accounts Acquisitions Authorities Black Gold Blanchard Carpinteria Catalog Cataloging Circulation Goleta Lompoc Notices Paso Robles Patrons Santa Maria Serials Test  
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# 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

<b>BLACK GOLD COOPERATIVE SYSTEM LIBRARY JURISDICTION CODES</b>			
<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

Jurisdiction	ILL Staff	Phone Number
SP	Nancy Duenas	805.525.3615 x 102
GO	Elizabeth Saucedo	805.964.7878
LM	Dominic Keen	805.875.8789
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
SM	Santa Maria (Main) (branches do not have faxes)	805.922.2330

## 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.