

BAY COUNTY LIBRARY SYSTEM
Circulation Policy and Procedure Manual
October, 2024

BORROWER REGISTRATION

We are now a fine free library

Eligibility to borrow:

Persons must have a Bay County Library System library card (or a BCLS barcode label) before borrowing materials from the Bay County Library System.

A person may have only one card with the status of “active” at any one time.

In compliance with P.A. 89 of 1978 of the State of Michigan, any person having proper current identification may apply for and receive a Bay County Library System library card.

When making application for a new library card a photo ID, such as a driver’s license or state card, with current address is preferred. Depending on circumstances, other documentation such as a checkbook, bill from a utility company, or student identification may be accepted. When an address requires verification, library staff may ask an applicant to bring in a postcard after it has been mailed to the address in question. A parent’s signature must accompany a library card application for a minor under the age of 18.

There are no charges for new, damages or replacement of library cards.

Borrowing Privileges Policy

All patrons are issued a library card when they open an account with the library. A patron’s library account is in good standing as long as their outstanding balance is less than \$5, there are no outstanding fees for lost or damaged materials, and there are no overdue materials from loaning libraries outside the Valley Library Consortium, including the Michigan Electronic Library Catalog (MeLCat) system.

All patrons are encouraged to carry their library card so that it can be presented to library staff when checking out library materials. A patron whose library account is in good standing may forget to bring their library card into the library. In such a circumstance, library staff may allow materials to be checked out provided the patron has a valid picture ID or is able to verify information (i.e. name, address, phone number, date-of-birth) in their account. Library staff may choose, at their discretion, to deny checkout without a library card when they have reason to believe this privilege is being abused.

Patrons whose library account is in good standing may check out materials without their library card by presenting their library card information (i.e. scanned barcode or card number written down, entered into an electronic device, or memorized). For security purposes, library staff may choose, at their discretion, to require that the patron provide a valid picture ID or be able to verify information (i.e. name, address, phone number, date-of-birth) in their account before allowing checkout of materials.

Patrons whose library account is not in good standing may use the materials in the library, but are not entitled to either borrow materials. They can use library computers.

Normal Registration Procedure: In Checkout screen

IF ADULT:

1. Fill out registration form. Patron will need some form of ID.
Drivers license, Post marked mail, or Bill.
2. With ID go to Borrower/Find Borrower/Search Borrower name
If the borrowers name is not located go to
3. Borrower / New Borrower
4. Scan Library card number and continue as directed.

IF Minor (0-17yrs old):

1. Fill out registration form
2. Parent or guardian's signature is required along with ID for minor to receive card with or without parent present.
3. All parent release information must be filled out for parent to have access to account.
4. The Guardian's name who filled out form goes on
 - Dynix Note 1
 - Dynix Note 2 Type REL INFO TO and name of parent or anyone who parent wants to have access to minors account.
5. Continue as directed below in Data entry guidelines.
6. We no longer keep patron registration forms for one year. Just shred

NON-RESIDENT LIBRARY CARDS

Blpnrpy= Non-Resident paying patrons This code will put a \$50.00 charge on patrons block screen

- Teachers and students out of district area, (Midland, Freeland parts, Vassar for example) who have to pay \$50. for a library card for one year, can get it for free as long as they are a student in a Bay County School/College. Teachers also fall under the same rule.
- Exceptions to this rule are they can't check out any special collection.

ANY non-resident can not check out any special collection. This includes, Overdrive, Libby, Adult discussion books, STEM Kits, and Library of Things.

Data Entry Guidelines for Library Card

Barcodes

New

Delete

(Barcodes listed)

1 of 1

Barcode

Enter new barcode here

Name (Last name comma space first name space middle name or initial. **No periods. ALL CAPS.** DOE, JANE L)

(**NOTE:** Names with “JR”, “SR”, “III”, and the like, are entered as follows: SMITH, JOHN L JR) Hyphenated names (SMITH-JONES,) no space between names and hyphen

(**NOTE:** Names beginning with “MC” (or “MAC”) are input without spaces, as are “two-part” names beginning with Van, La, De, etc.: MCWILLIAMS; MACDONALD; VANHORN; LAPORTE; DEBERG; etc.)

Address Type (This defaults to “**Permanent**”. **Temporary** addresses (with Begin/End date ranges) can be added by clicking the “New” button in the address “blink”).

Address (Letters are **ALL CAPS. No periods.**)

(“Street”. “Road”, “Lane”, “Avenue”, “Court”, etc. are always abbreviated [ST, RD, LN, AVE, CT, etc.])

(**If** there is an apartment [APT] or similar number, it is always entered on Line 1. (The street address is then entered on Line 2.)

If there is a PO BOX, it is always in the last line used.

(See samples below*.)

City, ST (Enter appropriate code) (**If there is no code for the city you are entering, enter “temp” as the code and place the city and state info in the “Borrower Note” field. Then fill out and submit the “City Code Request Form”**

Procedure for Requesting a New Horizon City Code

If you are entering a new borrower and a city code does not exist in Horizon for the needed city then,

1. Type the city and state in the “line 4” of the addresses blink of the borrower record.
2. Type in or select the “temp” city code from the list of codes
3. Send an email to citycode@vlc.mi.us and include the following information:
 - A. Name of borrower
 - B. Borrower barcode
 - C. City and State

The new city code will be entered in Horizon for that borrower, but you will NOT receive a reply to your email. New city codes will normally be entered within two business days.

Postal Code (i.e., zip code) (#####)

Notice By: “Stnd” is the default. If patron wishes to be reached by email for notices and other library information check (E-mail) instead of (Stnd). Add email address and change phone type to reflect (No Telecisc) so it will be sent by email.

E-mail: If the patron provides an email address, enter it in the email address field.
Choose radio button only if they wish to receive info thru the email.

ID (Not used by BCLS).

Phones (###-###-####) Always Add area code
(Add additional phone numbers as needed.)

PHONE TYPE GUIDELINES

There are three options to choose from after entering the phone number depending on how the patron wants to receive information from the library.

1. Email - NoTelecisc
2. Home – No Telecisc
3. SMS Text messaging– to receive texts click the first three items listed below:
SMS Preoverdue, SMS Overdue, SMS Holds. Leave the fourth one unchecked.

Always enter the area code when entering a phone number.

| Phone Type/Description | |
|------------------------|---------------------------------|
| c | Contact (by phone) - NO Printed |
| cell | Cell phone - NO Telecisc |
| cellt | Cell phone - Telecisc |
| h | Home - NO Telecisc |
| h-TC | Home - Telecisc |
| none | No phone |
| p | Pager |
| smstext | SMS text messaging |

Phone Type Total: 11

OK Cancel Add Edit

Cell Phone Telecisc
Home Telecisc
Cannot be used.
No longer have a telecisc system

Birthdate (mm-dd-yyyy)

BType (Enter appropriate BTYPE code) BLP, BLPNR, ..

New codes as of Fall 2024 are

Blpck= BL Check Residency

Blpnrpy= Non-Resident paying patrons,

BIT5 Nonpermanent Resident

Code Lookup: Borrower Circulation Types

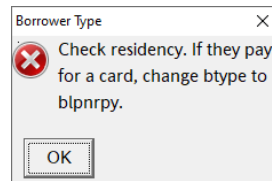
| BType/Card Fee/Description | |
|----------------------------|-------------------------------------|
| blbbk | BL BBK Patron |
| 0.00 | |
| blbbknr | BL BBK Non-Resident |
| 0.00 | |
| blbcls | BL Bay County Library System Branch |
| 0.00 | |
| blbg | BL Bay County Garber High School |
| 0.00 | |
| blcorp | BL Corporation |
| 0.00 | |
| bldigit | BL Digital Use Only |
| 0.00 | |
| blill | BL Interloan Library |
| 0.00 | |
| blp | BL Patron |
| 0.00 | |
| blpck | BL Check Residency |
| 0.00 | |
| blpnr | BL Non-Resident |
| 0.00 | |
| blpnrpy | BL Non-Resident Paying Patrons |
| 50.00 | |
| blselfr | BL Temporary self registration |
| 0.00 | |

Borrower: Age and Location

Stat Class (Enter up to 2 appropriate BSTAT codes. The order in which they are input does not matter. IF BORROWER IS **NOT** A BAY COUNTY RESIDENT, YOU **WILL** ENTER ONLY ONE: THE GEOGRAPHIC BSTAT.)

Bay County New Tract Codes 9-14-2011

| <u>Zip Code</u> | <u>Area</u> | <u>New Code</u> |
|-----------------|-------------------|-----------------|
| 48611 | Auburn | bl48611 |
| 48706 | Bay City (west) | bl48706 |
| 48708 | Bay City (east) | bl48708 |
| 48613 | Bentley | bl48613 |
| 48732 | Essexville | bl48732 |
| 48631 | Kawkawlin | bl48631 |
| 48634 | Linwood | bl48634 |
| 48747 | Munger | bl48747 |
| 48650 | Pinconning | bl48650 |
| 48710 | University Center | bl48710 |
| 48652 | NW Bay County | bl48652 |
| 48623 | SW Bay County | bl48623 |



Blpck= BL Check Residency

Block will come up on screen when you wand card saying above. This lets you know that the patron's residency needs to be checked. If they are out of residency you need to change to BLpnrpy.

Blpnrpy= Non-Resident paying patrons This code will put a \$50.00 charge on patrons

block screen This is the only code you need when signing up a patron for nonresidenOnce changed it will put a \$50.00 block on their record. Take charge off and leave the code as (blpnrpy) . Update expired date in patron's record one year ahead.

Remind patron that they will have NO access to our electronic materials

Pinpointing Patron location: Search

[file:///C:/Users/ajw/Desktop/Census%20Reporter %20Making%20Census%20Data%20Easy%20to%20Use.html](file:///C:/Users/ajw/Desktop/Census%20Reporter%20Making%20Census%20Data%20Easy%20to%20Use.html)

OR www.randymajors.org

Default Location Horizon will supply the code for your default branch. The circulation supervisors at each branch can edit this when needed.

Exp. Date (This will default to a date FAR in the future because we do NOT use the "Expiration" function. Do NOT modify this value.)

Best site for checking for Out-of-district is

Randymajors.org

1. Choose Current Location Tools
2. Choose What County am I
3. Type in address and it will display red lines for county and flag for patron location

Randymajors.com

Driver's Lic. #

Michigan ID Number

ID Number (We will not be using this field. However, at one time it was used for the birth date in Dynix and thus, in older records, may contain that info.)

School (Not used by BCLS.)

Guardian (Enter the guardian who signed the

Borrower Note (For the persons to whom we details below.)

Check County to see if resident. Saginaw Co more involved. Each township has to have a contract with the city To allow residents to get a card for free. Thomas township is one of the townships that is a nonresident of Bay County.

name of the parent or minors form.)

minors, enter the names of can release information. See

Dynix Note 1, Note 2, and Note 3 These are free text fields for whatever notes, comments, etc. we need to keep. These are interior notes.

For minors Dynix Note 1 is the guardians name. Dynix Note 2 for a minor states, “REL INFO TO” and anyone the guardian wants to have access to the minors account.

Language (Leave this field alone.)

***PIN** (Enter the 4 digit PIN number provided by the patron. **If the patron has not provided a PIN, please enter four zeros.**)

Approved Will be automatically checked by horizon system unless a self-registered card Is used. When a patron comes in to get a card in place of the self registered card you need to click APPROVED or you will not be able to check out.

***SAMPLE ADDRESS FORMATS**

(No Apt. or similar #, no PO Box

| | | | | | |
|------------|---------------------------------------|-----------------------------|-------|--|-----|
| Addr. Type | <input checked="" type="radio"/> Perm | <input type="radio"/> Temp. | Begin | | End |
| Line 1 | 123 E MAIN ST | | | | |
| Line 2 | | | | | |

No Apt. or similar #, but with a PO Box

| | | | | | |
|------------|---------------------------------------|-----------------------------|-------|--|-----|
| Addr. Type | <input checked="" type="radio"/> Perm | <input type="radio"/> Temp. | Begin | | End |
| Line 1 | 123 SMITH RD | | | | |
| Line 2 | PO BOX 85 | | | | |
| Line 3 | | | | | |

(With Apt. or similar #, but no PO Box)

| | | | | | |
|------------|---------------------------------------|-----------------------------|-------|--|-----|
| Addr. Type | <input checked="" type="radio"/> Perm | <input type="radio"/> Temp. | Begin | | End |
| Line 1 | APT #120 | | | | |
| Line 2 | 123 N JONES AVE | | | | |
| Line 3 | | | | | |

With Apt. or similar# and with a PO Box

Addr. Type ☒ Perm ☐ Temp. Begin End

Line 1

Line 2

Line 3

Line 4

****PHONE TYPE GUIDELINES**

IF PATRON WANTS TO BE REACHED BY EMAIL, select the appropriate “NO Telecirc” phone type.

IF PATRON WANTS TO BE REACHED BY TEXT, enter phone number with area code and choose “smstext” in the code box. Texting will not get a paper notice sent in the mail ever.

If you KNOW the number provided by the patron is a cell phone number, use the "cell" phone type. (Cell phone – NO Telecirc.)

If you KNOW the number provided by the patron is a home number, use the “Home” phone type

Remember TELECIRC no longer available

Code Lookup: Phone Type

| Phone Type/Description | |
|------------------------|---------------------------------|
| c | Contact (by phone) - NO Printed |
| cell | Cell phone - NO Telecirc |
| cellt | Cell phone - Telecirc |
| h | Home - NO Telecirc |
| h-TC | Home - Telecirc |
| none | No phone |
| p | Pager |
| smstext | SMS text messaging |

Phone Type Total: 11

OK Cancel Add Edit

**Cell Phone Telecirc
Home Telecirc**

Cannot be used.
No longer have a telecirc system

When changing to SMS text messaging from email remember to change email to standard.

SMS Text Messaging on Horizon (2016)

It is important to understand that there is no guarantee of when the SMS message will be sent by the SMS server. It depends on the number of messages being sent, Internet traffic, and the size of the backlog of messages that need to be sent. Therefore, you should not expect that the text message gets sent out immediately. The SMS server will not send more than one text message per second per site.

If you create a message that is longer than 160 characters, the system splits up the message into two or more messages. Therefore, you need to take this into account when planning for the number of messages you need to send, as well as the potential extra costs to your library since you would be charged for each message sent.

Borrowers who travel to time zones outside their library's location should temporarily opt out of receiving SMS messages or turn off SMS messaging on their phone so that they are not sent text messages at times when they do not want them.

If borrowers have multiple SMS enabled phone numbers, the SMS text message will go out to every SMS enabled number. Some libraries are using this option to send text messages to the parent or guardians of juveniles.

SMS Text will not get a paper notice for fees ever.

In order for a patron to receive text messaging, these things must be done:

1. The phone type of the phone number must be "smstext" (for SMS text messaging).
2. The phone number must have an area code. If there is no area code, the text will send but will not be delivered.

3. The types of notices they wish to receive must be checked.

The screenshot shows a web-based interface for managing SMS settings. At the top, there are buttons for 'New' and 'Delete', followed by a dropdown menu showing '989-867-5309: smstext' and a '1 of 1' indicator. Below this, there are input fields for 'Phone' (containing '989-867-5309') and 'Type' (containing 'smstext'). To the right of the 'Type' field is a link that says 'SMS text messaging' and a button labeled 'Codes'. At the bottom, there are four checkboxes: 'SMS Preoverdue' (checked), 'SMS Overdue' (checked), 'SMS Holds' (checked), and 'SMS General' (unchecked).

Please note: Pre-Overdue notices for SMS are handled separately from the regular preoverdue notice settings. If the borrower is currently receiving an emailed preoverdue, they will continue to receive the emailed preoverdue.

“Exceptions”

A. Minors without valid ID.

1. If accompanied by legal guardian, the guardian’s ID will suffice.
2. If **not** accompanied by legal guardian, patrons whose library account is in good standing may check out materials without their library card by presenting their library card information (i.e. scanned barcode or card number written down, entered into an electronic device, or memorized). For security purposes, library staff may choose, at their discretion, to require that the patron provide a valid picture ID or be able to verify information (i.e. name, address, phone number, date-of-birth) in their account before allowing checkout of materials. See *Borrowing privileges policy*

B. Horizon system down.

Patron Must have a library card (or have card number) to check out when horizon system is down.

Contact person in charge when system is down. Do not necessarily go to PC reliance right away. Use Word document until told otherwise.

Exceptions to normal registration steps are as follows:

Step 1: Be sure to also ask the borrower if they have received (or applied for) a card at any other branch. (You might want to show them one of our cards and ask if they have one like it!!!)

Step 2: As written above.

Step 3: In addition to assigning BTYPE and Stat Classes, staff also carefully writes the borrower full barcode number on the form. Give the card to borrower to sign

Step 4: Place the completed registration form in a designated location for inputting at that time. **New Registration forms must be entered before dumping PC Reliance.**

If, when the system is back up, you discover that a borrower has already registered, add a special message block for the borrower: “Received second card when system was down.”

Step 5: As written above (although this step will not take place until the system is up). **PLEASE BE VERY CAREFUL WHEN MANUALLY KEYING IN THE BARCODE NUMBER!**

Step 6 and 7: As written, above.

C. **Power Outage**

We register patrons but can’t checkout materials during a power outage. Enter patrons before uploading reliance with VLC.

CHANGE OF ADDRESS, NAME, ETC.

Staff accesses the borrower’s record and edits the name, address, email address, or phone field as appropriate with proof of changed address. Remember to change the Stat Class if the zipcode changes. If staff person deems it necessary, they can have the patron fill out a form with all changes at your discretion

City Codes List

When entering data for the “City” field, you need to enter only the first three letters of the city. After you enter the code, the full name of the city and state will appear. If you do not know the code, click on the “Code” button for a list. Some frequently used city codes are:

| | | | |
|------------|-----|---------|-----|
| AUBURN | aub | | |
| BAY CITY | bay | | |
| BENTLY | ben | LINWOOD | lin |
| MIDLAND | mid | | |
| MUNGER | mun | | |
| PINCONNING | pin | | |
| RHODES | rho | | |
| SAGINAW | sag | | |
| STANDISH | sta | | |
| STERLING | ste | | |

PROCEDURE FOR REQUESTING A NEW HORIZON CITY CODE

If you are entering a new borrower and a city code does not exist in Horizon for the needed city then:

1. Type the city and State in the “Line 4” of the Addresses blink of the borrower record.
2. Type in or select the “temp” city code from the list of codes.
3. Send an email to citycode@vlc.lib.mi.us and include the following information
 - A. Name of Borrower
 - B. Borrower barcode
 - C. City and State

The new city code will be entered in Horizon for that borrower, but you will NOT receive a reply to your email. New city codes will normally be entered within two business days.

- Before you send information check the list carefully. Sometimes Cities are in order spelled out, such as (ST. Claire Saint Claire). Look around carefully.

GUIDELINES FOR ASSIGNING BORROWER CODES

A. **BTYPE** will be determined (for most patrons) by residency and whether they’re registering at the Bookmobile.

BTYPE CODE LIST

| BType | Description | Card Fee |
|----------|-------------------------------------|----------|
| blbbk | BL BBK Patron | 0.00 |
| blbbknr | BL BBK Non-Resident | 0.00 |
| blbcls | BL Bay County Library System Branch | 0.00 |
| blbg | BL Bay County Garber High School | 0.00 |
| blcorp | BL Corporation | 0.00 |
| bldigit | BL Digital Use Only | 0.00 |
| blill | BL Interloan Library | 0.00 |
| blp | BL Patron | 0.00 |
| blpck | BL Check Residency | 0.00 |
| blpnr | BL Non-Resident | 0.00 |
| blpnrpy | BL Non-Resident Paying Patrons | 50.00 |
| blselfr | BL Temporary self registration | 0.00 |
| blsr | BL School | 0.00 |
| ⇒blstaff | BL BCLS Staff | 0.00 |

B. **PSTAT** codes will be assigned as outlined below:

1. For non-Bay County residents applying for a **BCLS card**, only one PSTAT code needs to be assigned: the appropriate geographic code from the code list below.

2. For Bay County residents applying for a **BCLS card**, up to two BSTAT codes will be assigned, based on whether or not the borrower provided the needed information.

(a) **Age (Year of Birth) Category:** Note the “year of birth” from the registration form and assign the appropriate code from the code list below; (e.g.: “Early 40’s” [**BLE4**] would be 1940 - 1944, while “Late 40’s” [**BLL4**] would be 1945 - 1949). IF THE BORROWER DID NOT PROVIDE A DATE OF BIRTH, DO NOT ASSIGN AN AGE BSTAT CODE.

b) **Geographical (Zip code or county) Category:** All geographic, codes start with the letters “**BL**” Bay county Library and the appropriate zip code, four letter county code, This can be determined by looking at the patron’s zip code. If the patron is out of Bay County enter “BLT” and the three letter county code. For out of area use other counties “bltoth” ex. BL48732 or BLTSAG (Codes listed on page 5)

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Age (Year of Birth) BSTAT Codes

Born in the **Late 90’s** (__ 95 - __ 99) = **BLL9**
Born in the **Early 90’s** (__ 90 - __ 94) = **BLE9**
Born in the **Late 80’s** (__ 85 - __ 89) = **BLL8**
Born in the **Early 80’s** (__ 80 - __ 84) = **BLE8**
Born in the **Late 00’s** (__ 05 - __ 09) = **BLL0**
Born in the **Early 00’s** (__ 00 - __ 04) = **BLE0**

Gender BSTAT Codes

No longer input

Special BSTAT Codes

BLILL = InterLoan Library

Reactivate a Library Card.

A valid identification is required. * Minor’s must have a valid ID, or a listed parent or legal guardian’s valid ID to activate a card.

1. Access the borrower’s record on Horizon system
2. Once you have selected borrower’s record, select “Edit Borrower” from the borrower menu at “Barcodes” click on “Down arrow” and view library card history.
3. Verify that patron does not show an active card, before reactivating lost card. We will not reactivate a lost card if a new card was purchased after declaring a card lost. *
4. Select barcode that needs to be activated.

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5. Highlight date and delete
6. Save/close the record

Set card to "lost" by typing in today's date. Enter a new card by selecting "new" and then entering card number. Save account.

To "reactivate" a card highlight card number and then save account.

***If there is more than one active card** on file check to make sure one card is not an active school card (Garber). There may also be Self-registered cards by patron. Keep most current card AND school cards.

LOST CARD

*A borrower may have only one card with the status of "active" at any one time.

They could possibly have another card through a school program, Garber...

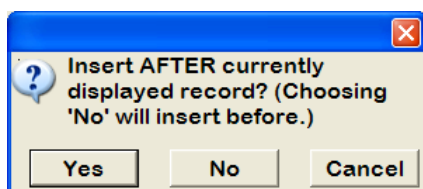
There will be no charge for replacing lost or damaged library cards.

Borrowers are responsible for all materials borrowed on their card until it is reported lost or stolen. (See also "Claims Never Checked Out", in this manual.)

When a borrower declares their card "lost":

1. Access the borrower's record on the Horizon system, per Horizon manuals.
3. Once you have selected this borrower's record, select "Edit Borrower" from the Borrower Menu and verify the information in borrower record.
4. Enter a "Date Lost" for this barcode, per Horizon manuals.
5. Click the NEW button.

A message will come up:



Choose "NO" so number will be on top of list.

6. Take a new BCLS borrower card from your supply and add the new barcode number (Click on the "New" button at the barcode field.). Give the card to the borrower and ask him/her to sign it. Save and close the borrower record.

Self-Registration Procedure at circulation desk for card pickup:

- Ask for patron's ID and have them fill out a registration form just as before. Minors still need guardian signature and ID.
- Look up their name keeping in mind that they might have more than one card and it might have errors to correct.
- Card examples:
 1. A card that has been registered in the past and used. (GOOD CARD USE THIS)
 2. A High School Card. (Garber) Good card but don't use
 3. A self-registered card...maybe more than one. Get rid of card if an existing one is available and this card has no holds.

Where to find the self-registered Patron cards:

- A. last name, first name
- B. First name, Last name
- C. Last name,First name (**No space** after comma will put name at the end of the last names)

If they have an old card already and a self-registered card, get rid of the self-registered card, after checking to make sure they have no holds on the self-registered card. If there are holds transfer them to the card you keep. But NEVER to a High School card!

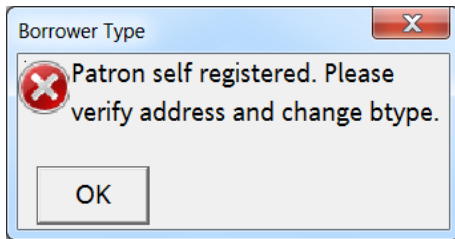
- Remind patrons with more than one self-registration card that they do not register every time they want to use the system.
- Check to see if patron changed their "preferred pickup library". This is where their holds will be sent. Show them where to go on Enterprise to do it themselves.

The screenshot shows a web interface for a library system. At the top, there's a search bar with "Everything" selected and a "Search" button. Below this is a navigation bar with icons for Personal Information, Checkouts, Holds, Fines, and Additional Information. The main content area is titled "SASS, JANICE N" and includes a "Change PIN" link. Under the "Preferences" section, there are several dropdown menus: "Default Language" (English), "Default My Account Tab" (Personal Information), "Default Checkouts View" (Library Checkouts), "Default Holds View" (Library Holds), "Preferred List" (no default list), and "Preferred Pickup Library" (Bay Co/Auburn). An "Update" button is at the bottom right of the preferences section. On the right side of the page, there are sections for "Checkouts" (Digital, Library, Overdue), "Holds" (Digital, Library, Ready for pickup), and "Fines" (Total due).

Self-registered library card expires at 30 days. They remain on the system until deleted by staff. The below message will appear to inform staff of expired card. If this is the only card under this name, click "CKO-No Renew" and continue with update. If there are others delete this card.

The screenshot shows a dialog box titled "Expired Library Registration". It contains the following information: "Borrower: SASS, JANICE (blselfr - BL)", "Regis. Date: 01/11/18", and "Expire Date: 02/10/18". At the bottom, there are three buttons: "Renew", "CKO-No Renew", and "Cancel".

Below block is to inform you that this is a "self-registered" patron that needs to fill out a registration form and update the record.



Updating Patrons account: If there is no other account but the self-registered account edit.

- Go to edit borrower and begin editing with completed registration form.
- Library Card: Set self-registered card to lost & issue new card
- **How notices are received** Inform patron about "preferred pick-up location.
- Birthdate
- BType
- Stat Classes
- All errors noticed in name, address, and punctuation. Self-registered library cards expire at 30 days. At that time a block will appear

After update record you need to click **approved** to complete. If not approved horizon will not allow you to checkout to patron.

When you are done issuing a permanent library card make sure there is only one card on Horizon under patron's name. CLICK ON APPROVED

LIMITS ON BORROWING

75 = Total number of items out, per borrower, at any time.

**25 = Total number of new/not new, AV materials including:
BOCD JBOCD, CD, JCD, DVD/BUE RAY, JDVD/BUE RAY
multimedia, Playaway Wonderbooks, and ALL Childrens AV
materials also out, per borrower, at any time.**

3 = Total number of Backpack Kits, Stem/Steam Kits,

Playaway, Launchpads (no wifi), per library card at any time. Days held on hold shelf 7. two renewals, Loan period 3 weeks
3= Total number of **Board Games** per library card at any one time Two renewals
 Three week Loan period Days held on hold shelf 7
2 = Total number of **puppets and toys out**, per borrower, at any time
2 = Total number of **book connection discussion titles** that can be checked out at any one time. No holds No renewals

~ = **Total number of E books (Electronic books)** that can be checked out at any one time vary within the different platforms such as Overdrive and Libby. No renewals. Circulation periods may vary . Only Bay County residents can checkout Electronic materials due to Company contract policy.

Only Bay County Residents can check out material Special collections listed below

| | Reminiscence Kits BLJ7 Count and Check in | Board Games BLJ7 Count and check in | Playaways BLJ7 Wipe off screen and Check in | Launch Pads BLJM Wipe off screen and check in | Backpack Kits BLJ14 Count all pieces and check in | Wonder Books/ Voxbooks BLV Check in | STEM / Tonie Boxes/ Tonie Characters Kits BLJT Do not CKI Send last patron sheet | Library of Things BL7 Do not check in. Send last patron sheet | Adult Discussion Books BL42 Count books, Check for condition and check in | Non-Permanent resident patron BLT5 |
|--|---|--|--|--|---|--|--|--|---|--|
| | Patron can have total of 9 items from blue--- 3 of each category | | | Patron can have total of 3 items from yellow, but only one from a category | | | | | | |
| Loan Period | 3 weeks | 3 weeks | 3 weeks | 3 weeks | 3 weeks | 3 weeks | 3 weeks | 3 weeks | 6 weeks (42) | 3 Weeks |
| Requests Allowed | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | No | Regular limit |
| Renewals Allowed | 2 | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| Days Held | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 3 | 10 |
| Max Items Out | 3 One of each blue | 3 Total 3 | 3 | 1 | 1 | 1 | 1 Tonie characters 2 | 1 | 2 | 3 |
| Replacement Cost | Full cost, unless department head determines otherwise | Per missing piece if replaceable; otherwise, full cost. Department head determines | Full cost, unless department head determines otherwise | Full cost, unless department head determines otherwise | Per missing piece if replaceable; otherwise, full cost | Full cost unless department head determines otherwise | Per missing piece if replaceable; otherwise, full cost TonieCharacters new IType BLVN | To be determined by department head | Half cost of missing/damaged book | Depends on what they check out. Books = ½ price All other items Full price |
| Other Collections New Collection Code Bbixs.Tonie Box Characters | Math in the Mail At AJWPL only BLJ7 3 requests | | Non-Permanent Resident Patron BLT5 | Card expires in 90 days. Same renew times | Maximum Items checked out 3 NO MEL CKO | Not allowed to CKO the following: No MEL Special collections, Library of things, Launch pads --> | STEM/STEAM Kits Games, Playaways , Launchpads ... Only Books, Dyds , Cd's, Magazines, | | | Card expires in 90 days. NO special collection of any kind 10-2024 update |

Cost is determined: If we get a discount for an item, example a book, then we charge ½ price. Full price for

items we pay full cost for.**Please note: Patron is limited to a total of 3 unique**

collections items checked out on their card With this, as with all policy, staff is

asked to use their best judgment in interpreting policy in each specific and unique situation.

SPECIAL COLLECTIONS: COMMENTS

Nintendo requires a Nintendo account to make full use of the Switch. To prevent patrons from using their own account, I created one and locked it in on both our Switches. Patrons will be able to download free apps such as Youtube, game demos, and free software through the Nintendo Store if they so choose (we can delete these apps on return) but will need the account password to add a credit card to purchase additional software or games, which they will not have access to. This "account" is also the primary user of the Switch named AJWPL. I can change this display name to BCLS if wanted, but it's just a display name- nothing else really required of it.

RESIDENTS ONLY

Backpack kits

Bbjbp

[Blj7](#)

Board games

Bpzfg

Bazfg

Bbzfg

Bgzfg

[Blj7](#)

Launchpads

bbjpm, bajpm, bgjpm, bpjpm

[Blj7](#)

STEM/STEAM kits

Bajsd

Bgjsd

Bbjds

Bpjds

[Blj7](#)

Math in the Mail

(generic record #1500748)

Bbjffg (children's file folder games)

[Blj7](#)

Reminiscence Kits

[Blj7](#)

Wonderbook/Vox

Bbjbtk

Bajbtk

Bgjk

Bpjk

[Blj7](#)

Playaways

Bgjbt

Bbjpl

Bpjbt

Bajbt

[Blj7](#)

Library of things

Bblot

[Blj7](#)

Book Club Books

[Bl42](#)

RL 8/10/23

Corporate cards

Corporate cards may be given to any company located in Bay County. The benefit of the corporate card is that any employee of that business may use the card to check out items for that business. The business assumes the responsibility for items checked out and the corresponding fines or fees as set forth in the manual. The card must be presented each time a patron wishes to check out and is used in the same manner as an individual card. Businesses may contact any Managing Librarian at any of the four branches of the Bay County Library System, to discuss receiving a corporate card.

LOAN PERIODS, DATE DUE INDICATORS, CHECK-OUT NOTES AND RENEWALS

The following loan periods and renewal limits have been established.

Unless otherwise noted, an extension of the loan period may be granted at check-out time if circumstances warrant.

No extensions will be granted for items on hold.

Items may be renewed the number of times indicated below.

Items on hold may **not** be renewed, **regardless** of the guidelines below.

3 Week Circulation

Now at all branches including bookmobile and drive up window are receipt printers
No due date cards or stamping materials. MEL exception. Write due date on label

DVD/Blue Ray, Board Games, backpack kits, Launch Pads, and puppets

A 3 week date due. **2 renewals** is permitted. **Magazines**

Two renewals are permitted.

Newspapers

Bay City Times Papers **CANNOT** be checked out at Wirt library. All Other branches check out newspapers except for current issue. Stamp the due date on the front page near the masthead. **Two renewals are permitted.** 2018 update

Playaway Wonderbooks Date due is stamped on the appropriate sticker on the back of the case. **Two renewals are permitted.**

Playaway Launchpads 2 renewals, Held on hold shelf 10 days Cko/
Holds only for Bay County residents.

Wonder Books Check out for 3 weeks with 2 renewals

Solid green light = charged and ready to go.

Flashing green light = in pause mode

Flashing red light = low battery

Puppets

3 week check out. Limit 2. **2 renewals**

Board Books

3 week check out. **2 renewals**

Books

All books not listed above. **Two renewals are permitted.**

Electronic Books “Libby or Override”

No renewals. Checkout periods are 7 days or 14 days with a fourteen-day default

Adult Discussion Books

Two titles can be checked out at a time for each book club for 6 weeks. Titles cannot be renewed, and no holds can be placed on titles. Checkout to BCLS only. If patrons from other branches need a title call Wirt fiction desk to have title delivered to branch. A

Patron can ask staff to “Hold” an item for our three-day hold period. Set item to “holdself” status and attach patrons name to book and place item hold shelf

Overnight Circulation

Reference Books

Circulate only with Branch Librarian or Reference Librarian permission. Due end of next business day. **No extensions. No renewals**

(Note: The Horizon terminal will simply show the date due, not the time.

BORROWING PRIVILEGES SUSPENDED

When library privileges are suspended, the patron may not borrow library materials
Borrowing privileges are suspended for the following reasons:

1. When the borrower has \$5.00 or more in outstanding fees. The borrower may complete the renewal.
2. **When the borrower has at least one LOST item in their record.**

BORROWER BLOCKS

General Information

The Horizon system will, for various reasons (overdue books, fees, etc.) “Block” a borrower when their barcode number is scanned into the Horizon system at check-out time. Most blocks are attached to the borrower’s record automatically by the system. Others are created manually by the staff (e.g., fee for damaged materials).

The Current Block windows display the borrower’s blocks. This window allows the staff person to choose “Checkout”, “No Checkout”, “Payment”, or “History”. The staff person will, if necessary, ask the system for details on the block (“Detail” button) which will then be displayed on the screen. Whether they are overridden will be determined by staff using appropriate policy.

CHECKING OUT LIBRARY MATERIALS

1. If the borrower presents a BCLS card with a BCLS barcode label attached, enter the barcode number per Horizon manual. The borrower’s name and barcode# should appear in the checkout window.

If after scanning the barcode the name does not appear, one of the following may be the problem:

(i) Error Message: “Cannot find a borrower with that barcode.”

Click on the “Continue” button. Call up borrower record by name, per Horizon manual, and compare barcode number on card to barcode number (if there is one!) in borrower record. Modify the record as needed: If there is no barcode, enter the barcode number per Horizon manuals. If there IS a barcode number, enter a “Date Lost” and use the card in hand to enter a “New” barcode, per Horizon manuals. Proceed with checkout.

NOTE: If you know that the borrower’s last name is followed by a designation such as “JR” (junior), or “III” (the third), enter the name as follows:

SMITH, JOHN JR

(ii) Barcode is damaged or otherwise unscannable. Ask for ID and find the borrower by name per Horizon manuals. After you select the borrower, use “Edit Borrower” from the “Borrower Menu” to set the current barcode number to lost and add a new barcode number per Horizon manuals. Save and close the borrower record. Ask the patron to sign the new card. Staff destroys the old card. Resume the check-out procedure.

B. If the borrower forgot their library card, ask the borrower for some form of acceptable ID and ask questions to validate it is their record.

3. **If a Checkout Message alerts you to an ADDRESS CHECK** (this will happen every 180 days from the date of the creation of the borrower record), click on the “Continue” button in the Checkout Message window. The address check window appears. Ask the borrower to tell you their address **and their phone number**. If needed, ask the patron to fill

out a change of address and modify the address **and/or phone number** in the record. Place the change of address form with the applications needing BSTAT inputting.

4. If the system alerts you to a Lost Card: Keep the card until you see correct ID and, click the “Cancel” button on the “Lost Card” window and then click “Continue” on the next error message. Find and select the borrower by name and address per Horizon manuals and go to “Edit Record” from the “Borrower” menu.

- (i) **If the information in the borrower record matches the ID** there will be at least one (1) barcode number for that record with a “Date Lost”. (**IMPORTANT:** The borrower record shows only one barcode at a time. Use the barcode pull-down menu to see any others.) There should be no more than one “active” card; i.e., only one card WITHOUT a “Date Lost” attached to it.

If there IS an active card, inform the patron that they will need to use THAT card and destroy the one in hand. You can also offer a no-card checkout.

If there is NOT an active card, delete the date in the “Date Lost” field. Save and Close the patron record. Proceed with checkout.

(ii) **If the information in the borrower record does not match the ID (‘s)** (name and birth date), keep the borrower card and end the check-out. Keep the card **Add a note to the patron record stating what happened for next staff person.**

(iii) If Patron has no ID, You can also use a BCLS postcard. Filled out with the patron’s new address as a form of ID. Have them bring it back when they receive it in the mail postmarked.

5. If a borrower block was issued by the system, proceed to step **6**. If not, proceed to step **7** for check-out.

6. When a block appears, the block screen will immediately appear, listing all current blocks. As needed, request a detail screen for any block(s), per Horizon manual, and proceed as indicated in steps **7A** through **7L** below.

IF there are fines listed discretely waive them

7. Current Blocks

A. Unpaid damage fees, lost item fees, Out of District Charge (\$50.00) etc.: A block will be issued for any unpaid fees.

(i) **If the total amount owed is less than \$5.00,** inform the borrower of the outstanding charges. Collect any payment offered and credit the borrower’s account per Horizon manual. Click the “CKO” button and proceed to step **8** for check-out.

(ii) **If the amount is \$5.00 or more**, ask the borrower if they wish to pay all or part of their balance. If payment is made in full, or they bring it under \$5.00, proceed as in step 7A (i), above.

If, with or without payment, the fees remains at \$5.00 or above, inform the borrower that **the system will not allow check-outs** . Click the “CKO” or the “No CKO” button, as appropriate.

If patrons claim that they already paid any or all of the fees listed on their Current Blocks Screen, staff should use their own discretion to determine whether or not to waive the amount. Staff should also feel free to contact a supervisor if available. If staff becomes aware of a recurring problem, appropriate messages should be added to the patron’s BURB. The circulation supervisor or managing librarian may need to determine whether repeated claims can be honored.

B. Overdue Materials: A block will be issued whenever a borrower has even one item one day overdue. If the borrower **claims** the items were **returned**, or offers **payment for lost items**, see “Borrower Unresolved Blocks (BURB)” in this manual. **If the borrower wishes to renew the item(s), proceed as outlined in 8E, below.**

(i) **If the borrower claims to have never checked out those items**, ask the borrower if it is possible they were checked-out for someone else, or if someone else was given his/her card to use, or if someone else could have had access to it. If one of these is the case, politely remind the borrower that he/she is responsible for all items charged to that card. **If the borrower insists that no one else had access to the card, Do a shelf check and if not found see “Claims Never Checked Out” in this manual (pg 45)**

C. Previous Claims Returned’s: A block is issued when a borrower has **items** with the status of “claims returned”. This information is used only to determine whether to honor future claims. Proceed with check-out.

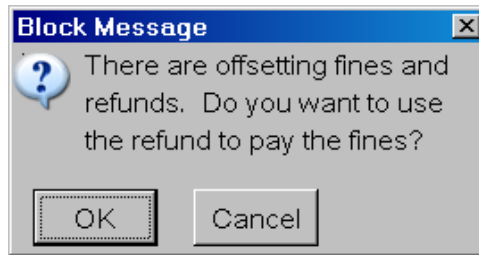
D. Item Being Held. Alerts you to the fact that a notice has been sent (or a phone/email sent) to this borrower. Pull the item from the “Hold shelf”**, and proceed with CKO. ****NOTE: If the item is NOT on the hold shelf, it may be that it is being held at a different branch. Examine the block to verify this.**

E. Hold Expired. The borrower failed to pick up the item, **delete block**. No need notifying patron.

F. Fees: These are included in the totals described in 7A, above. If payment is offered, see “Payments” in the appendix to this manual.”

G. Refund Due No Refunds on returned lost items. Only staff added refunds honored.

IMPORTANT NOTE: We no longer give refunds, If the patron OWES money for unpaid fees and other lost items, etc., the system will ask if you want to use the refund to "pay" on the other fees. **There is NO way around this.**



If you say "OK", it will automatically credit all or part of the refund to these unpaid fees. If you "Cancel", you will simply end up at the BURB screen with all blocks displaying.

If the amount that was owed in fees was less than the amount of the refund, you will have a Credit block for the remaining refundable amount. Handle this as indicated above in the "No Offsetting Fees" scenario. Then let a supervisor know to remove

I UNIQUE TIME-LINE AND BORROWER PAYMENT PLAN

Overdue items

14 days BCLS phone call
28 days BCLS phone call
42 days BCLS sends invoice, material put to lost

***** **If more than \$150.00** *****

43 days Unique sends Letter #1 adds \$10.00 to total
64 days Unique sends Letter #2
78-91 days Unique Phone call #1
106 days Unique sends Letter #3
120-133 days Unique Phone call #2
162 days Unique Credit Reports Patron & Unique is done with patron
Once patron is credit reported by Unique - out of our hands - patron only one that can try do anything about their credit report - they have to contact the credit bureau

A Payment Plan is made with the patron with parameters limiting the amount of time they have to pay off the debt by circ supervisor or managing Librarian. Then contact administration who will access Unique and suspend collection procedures for that time period discussed with patron. After the limited time is up, Unique will again continue calling to collect.

A Bankruptcy - we only get approx 1 a year - Patron files for bankruptcy - they have to list all they are in debt to. So they list Mortgage Company, banks, credit cards, library etc. When their claim is filed - the court sends letters to all who they listed - the companies then can determine what amount they can still demand from the filer. When the letter comes in to Kevin - he gives it to Jolene and. It is the Patron's responsibility to get hold of lawyer or court and have them send us the letter.

K. Address Correction Requested: A notice sent to the borrower has been returned. Ask for ID. Modify the address in the borrower's record accordingly. **Delete the block. If you update don't forget to update all the way through. Ex zip code**

L. Other Staff-Created Blocks. As described elsewhere in this manual, it is possible for staff to create blocks manually. Usually, these will be reminders such as “Internet abuse” and the like. “See Supervisor” blocks may require special attention.

8. If NO BLOCKS APPEAR, you are ready to begin scanning item barcodes into the system. Scan the item barcode, place the appropriate date due “CARD” with the item (see “Loan Periods” in this manual), and proceed to the next item. NOTE: If the item is from another library, note the due date on the Horizon screen and make any change necessary on the due date card. Watch out for libraries which are open when we are closed and adjust the due date to our next open date
There are four situations that would interfere with this pattern, and these are described in **8A** through **8D** below:

A. Item Blocks and Related Matters.

(i) Borrower has reached maximum number of items allowed out. Proceed according to the “override guidelines” in the “Limits on Borrowing” policy in this manual.

(ii) Borrower has reached maximum number of a particular item type. Proceed according to the “Override Guidelines” in the “Limits on Borrowing” policy in this manual.

(iii) Reference Books. Horizon is set up to allow a maximum of “0” reference books checked out. This is how it lets the staff person know that the item is non-circulating. Inform the borrower that this is a non-circulating item. (Remember, there may be a circulating copy available that they can take instead.) Occasionally, checkout of reference books is approved by the branch librarian or reference librarian for overnight circ. In that case, **(and only in that case)** proceed with check-out. (The Horizon system will treat it as a 1-day circ.).

(iv) Item Not Checked-In. If the item is currently checked-out to the current borrower, the system will assume the borrower is renewing the item. Proceed as prompted by the terminal.

If the item is checked-out to a different borrower, the terminal will display the name of the borrower to whom the item is currently checked out and ask if it should be checked out to this borrower. Click the “Yes” button.

(v) Item on Hold for Someone Else. Do not check the item out to the borrower since a notice has been sent. Offer to place a hold on the item. **However, if the borrower is legitimately picking the item up for someone else**, you will need to “override” the block. Respond with a “Yes” when asked if you want to check it out to the current borrower. Respond with a “No” when asked if you want to renew the other patron’s request.

B. Item Barcode Missing (from item or database) or Unreadable.

(i) Barcode number not in database. The system will prompt

you to create a “Fast Entry” record for the item. Create the record as described in “Fast Entry Guidelines” in this manual. Proceed with check-out. When returned process with new barcode

(i) **Barcode unreadable by scanner.** If the printed characters on the label are readable, manually key in the number and proceed with check-out.

If the printed characters are not readable, replace barcode from sheet of dumb barcodes or have department head replace.

C. **Group Charge Items**

(i) **Newspapers without barcodes:** Take the “**Magazine Group Charge**” barcode card stored near the terminal, and scan barcode on card. Enter the number of newspapers checking out as prompted. Stamp due date near top of paper.

After completing checkout, immediately go to Check in and scan the same group charge barcode. When asked, enter the number of items that had been checked out.

(ii) **Seed Library @ Wirt** Limit 10 packages at a time. CKO on group card CKI in on group card.

(iii) **Puzzles** Take the “puzzle group charge” barcode card, stored near the terminal, and scan that barcode into the system. Count the number of puzzles and type in the number.

E. Request for Renewal: If you haven’t already done so, enter the borrower and simply begin scanning the item barcodes. Be alert for “Maximum Renewal” and “On Hold” messages.

If the items are not present, click the “All Items Out” button. If renewing all items, choose “Renew All” from the CKO menu. If renewing selected items, highlight the items to be renewed and choose “Renew” from the CKO menu. Answer the “are items present” question as appropriate and proceed, watching for “maximum renewal” and “on hold” messages.

Receipt Printer: Check out materials on Horizon. When done use F11 key to print receipt. If patron want a list of everything checked out go to “All items out” and click **F11**.

REQUESTS FOR LIST OF ITEMS CHECKED OUT

Borrowers may receive a print-out listing the items they currently have checked out.

Borrowers may not receive a list (or be told verbally) of items checked out by someone else unless they can present that patron's library card, OR if they appear Borrower Note field in the borrower record of the minor in question as being approved by the parent/guardian to receive this information. They must show some ID identifying themselves as one of those persons.

NO CARD CHECK-OUT

If a patron is in good standing and doesn't have their library card he/she may check out using ID, Library card barcodes on smart phones or on a piece of paper or even from memory can be used at staff's discretion. **Always** back the use of the above with added questions to make sure you have the correct patron if you know them or not. (Phone #, birth date, address).

Receipt

MAGAZINE OR NEWSPAPER FAST ENTRY

| | |
|----------------|--|
| Title: | Title of magazine or newspaper (in ALL CAPS), followed by -FA (NEWSWEEK-FA) |
| Location | This will be supplied by the system. |
| Collection: | Enter your branch's fast entry code (BBFAST, BBJFAST, BAFast, BAJFAST, etc.) |
| Call# | Enter the issue date (JUN 1 1991) |
| Barcode | The barcode you scanned should already be present. |
| Item Loan Type | BL28 (Adult book) or BL28U10 (books under \$10) Children's books is BLJ28 |

BOOKs, AV, etc

| | |
|------------|--|
| Title | Enter the title in ALL CAPS, followed by -FA (GONE WITH THE WIND-FA) |
| Location | This will be supplied by the system. |
| Collection | Enter your branch's fast entry code (BBFAST, BBJFAST, BAFast, BAJFAST, etc.) |
| Call # | From item. |
| Barcode | The barcode you scanned should already be present. |
| Loan Type | Appropriate code / Click the "Codes" button for a list of codes.) |

RENEWALS

Renewal policy is outlined in this manual under “Loan Periods, etc.”

Auto Renewals

Beginning January 3, 2020, BCLS will offer a **two-time auto renewal** on all checked out items without holds. Items borrowed from other libraries systems, items that are on hold, Adult discussion books, eBooks, eAudiobooks, or other downloadable materials will not be auto renewed.

In-Person Renewals

This procedure is outlined in this manual under “Checking out Library Materials” and “Checking in Library Materials”.

Telephone Renewals.

Horizon:

Ask for the borrower’s library card number and enter it at the borrower prompt in check out window. If patron doesn’t have library card number handy, you can ask questions off their record (birth date, address...) to verify. This is always at staff person’s discretion. Since they are on the phone with no card available only renew materials. Don’t give out titles.

Override any blocks (as appropriate) by clicking the “CKO” button. Click on the “All Items Out” button to display a list of items out. Select the items to be renewed by clicking on them. (Note: If you are renewing ALL the items, simply go to the CKO menu and select “Renew All”.) Choose “Renew” from the CKO menu and proceed as directed.

MEL:

2) MEL items can be renewed 1 week before due date. Library card is needed to gain access to patron’s account. Not able to renew once overdue

During this process, be alert for messages that renewals are not possible for some items. For example, items for which there are requests, items which have reached their maximum number of renewals, etc. Generally, there is only one situation where a “renewal warning” message is overridden:

If the borrower is not able to provide their library card number, the telephone renewal can only take place but no titles given can be given.

BORROWER REQUESTS

All requests will be “first available copy” unless specified otherwise. Patrons may have up to 50 requests at any given time owned by the Bay County Library System. Items borrowed from ILL or MEL are subject to the policies of the lending library. This includes charges for damages, lost, missing, and related processing fees.

Requests made by phone must be accompanied by the borrower’s BCLS library card barcode number. Staff will key in the barcode number as it is read by the borrower. Staff will then ask for the borrower’s name. If the name given matches the name on the screen, staff will read to the borrower the list (or the requested part(s) of the list) of items out.

To print a list of All items out:

Enter the borrower’s barcode number or name at the prompt in CKO.

Use the “CKO” button to override blocks as necessary.

Click on the “All Items Out” button.

Push F11 key to print all items out

Placing Requests

If borrower wishes to place a hold on a title send them to the correct department to receive help. But if you need to...

The following procedure assumes the borrower is present:

1. Request the borrower's library card and scan it at the borrower prompt in CKO. If they don't have their library card, use ID or ask questions to make sure you have correct patron.
2. Search the database for the title per Horizon manual.
3. When the bib record is found, place the request per Horizon manuals.
4. If the borrower needs to pick the item up at a different branch, modify the pick-up location accordingly, by selecting that location from the drop-down menu on the request form.
5. If this is a "specific copy" request, be sure to check the "This copy only" box on the form.

IMPORTANT NOTE 1: For most books and other items you will be placing a "First available copy" (or bib level) request. **The most effective way to do this is from the bib screen, NOT the copies screen.** (If you try to place the request from the copy screen AND if the first copy listed is not request able (a lost item, for example), the system will tell you no requests are allowed, even though other copies ARE request able.)

Placing Magazine Requests

For magazines and other serials, you will be placing a "This copy only" request, thus selecting must be done from the copy status screen. Highlight the copy you wish to request and proceed per Horizon manual. **Be sure to check the "This copy only" box on the request form.**

Requesting Titles NOT Available via Request Through Horizon

MELCAT

Go to Bay County Library web site (www.baycountylibrary.org) . On the left side of the web page click on the "Search MELCAT" icon. Enter key word, author, title, or series title. Click on "Find it". The choose correct entry and click "Get this for me" High light "Bay County Library System", and then click "Submit Above information". Enter your name and library card information. Choose pickup location and submit. Hold is placed. System will not place a hold on an item that is checked out. You would have to wait until item is checked back in and try again to place hold.

MEL Overdue items: If books are returned after payment for the book is made the patron keeps the book. No refunds are given

MEL overdue items: If issues arise for a patron who abuses overdue Items can consider blocking patron from MEL.

LOST MEL Books or damaged:

When a Mel book becomes lost or damaged by our patron---**Ricarda @ BSA** contacts the owning library and has them send an invoice. We put a fee block on Horizon and on MEL.

Title Request List

The “Title Request List” for a particular title is the list of borrowers who have placed Requests for the title. It is in the order in which the requests were placed, but it can be “shuffled”. Also, borrowers often ask where they are on the list.

A request list can be accessed in two ways:

1. When conducting a search, at the full bib record for a title (or the copies screen) select “View Title Request List” from the “Requests” menu.
2. In CKO, after entering a borrower barcode, select “Requests” from the “Borrower” menu, thus producing a list of the items this borrower has requested and has on hold. Select a title by clicking on it and then click the “Item Queue” button.

Either of these procedures produces the queue with a “Reorder Queue”, “Cancel”, and “Edit” button. See the Horizon manuals for more information.

IMPORTANT: The borrower must not be allowed to look at the hold queue as this would be a violation of the Library Privacy Act.

Changing the Expiration Date for a Request

If, after placing a request, a borrower asks to have the expiration date changed, enter the borrower info at the borrower prompt in CKO. Select the “Requests” option from the “Borrower” menu. Select the title(s) in question and use the “Edit” button to change the expiration date.

Changing the Pick-Up Date for Item Being Held

If, after receiving their notice, a borrower asks to have the pick-up date extended, enter the borrower info at the borrower prompt in CKO. Select the “Requests” option from the “Borrower” menu. Select the title(s) in question and use the “Edit” button to change the expiration date.

Changing the Pickup Location for a Request

If, after placing a request, a borrower asks to have the pickup location changed, enter the borrower info at the borrower prompt in CKO. Select the “Requests” option from the “Borrower” menu. Select the title(s) in question and use the “Edit” button to change the pickup location.

Changing the Default Location

Ask Cathy Cook at BPI or Janice at AJW to adjust. Otherwise email VLC help desk To change.

Changing the Pick-Up Location for Item Being Held

When a patron calls and requests that an item being held for them be sent to another branch for pick up, the following procedure will be used:

1. Write down the patron's name, desired pickup location, and barcode number. Then pull the item(s) from the hold shelf and verify the titles with the patron.
2. Check the item(s) out to your branch's patron record.

When asked: "This item is being held for..... Do you want to check it out to..."
Click “Yes”.

When asked: "Renew this borrower's request?", click “Yes”.

4. Once all items are checked out to the branch in this manner, clear the branch and enter the patron's barcode at the prompt.
5. At the Current Blocks screen, delete the "Cancelled Hold" block for the item(s) in question.
6. Click the CKO button. Select the “Requests” option from the “Borrower” menu.
7. At the patron's request list, select the title(s) in question by clicking on each of them.
8. Click the “Edit” button. When asked if you wish to make a batch change, click the “OK” button.
9. At the edit screen, enter the appropriate three-letter branch code in the “Pickup Location” field.
10. Click “Save”.

11. Then click the “Cancel” button at the patron’s request list.
12. Clear the patron at checkout; then go to CKI and check in the item(s), following the instructions on the screen.

Suspending a Request (Inactive)

If, after placing a request, a borrower asks to have the request temporarily suspended (e.g., they’re going on vacation for a couple of weeks), enter the borrower info at the borrower prompt in CKO. Select the “Requests” option from the “Borrower” menu. Select the title(s) in question and use the “Edit” button to enter a “Suspend Until” date.

Deleting Requests

When a borrower says that they no longer need a title they’ve requested (but has not yet arrived for them) enter the borrower info at the borrower prompt in CKO. Select the “Requests” option from the “Borrower” menu. Select the title(s) in question and click on the “Delete” button. You then get an “are you sure” window. Click on “OK” to confirm the deletion.

Cancelling an Item Being Held

When a borrower tells you they no longer need an **item being held for them on the hold shelf**, pull the item(s) from the hold shelf and scan them at checkin. You will be asked if you wish to cancel the hold. Answer “Yes”. Then proceed as prompted by the screen.

Checking in Library Materials

NOTE: All items entering your building must be checked-in at a terminal.

The procedures outlined here under “Normal Check-in” assume that the borrower is not present when the items are being checked-in. **Waive all fines** for other VLC library items that are returned past due. If the borrower is present and wishes to pay any fees (or a portion thereof), see “Overdues” under “Special Circumstances”, below.

SPECIAL COLLECTIONS

Special collections are: Backpacks, STEM/STEAM Kits, Launch Pads, Board games, Puppets, Wonder books, and Adult Discussion Books. Depending on Library, Materials are counted and given to children’s room to replace materials as needed.

Normal Check-in

1. Scan the item barcode at the Checkin window.

NOTE 1: Group charge paperbacks, pamphlets, and magazines will not have barcodes to be scanned. Simply place them on the appropriate shelving cart.

NOTE 2: *For returning incoming YELLOW BAND ILL's, scan the item's barcode and proceed as outlined in "C", below.*

NOTE 3 For returning MEL items, depending on your branch either check in and place paperwork in book and put a mailing label in top of book to mail with outgoing materials. OR place in pile for full time to take care of.

- A. **Successful Check-in of YOUR branch's item:** Scan and place on appropriate shelving cart.
- B. **"Successful Check-in" of another BCLS branch's book:** The Horizon terminal will display the Checkin Message: "Location Difference. Item Status changed to "Transit". Please send item back to *(name of branch)*". Click on the "Continue" button. Place the item in the designated location for such materials at your branch.
- C. **Successful check-in of a returned incoming YELLOW BAND:** (i.e., an item that we requested from another VLC member for one of our patrons.) **Leave the yellow ILL band on the item.** The Horizon terminal will display the Checkin Message: "Location Difference. Item Status changed to "Transit". Please send item back to *(name of branch)*". On the yellow label, cross off the location code for your branch and circle the code for the location to which the item is being sent. If branch code has been previously used, DO NOT write it on yellow band. Place a new band on book and circle location sending. (NOTE: the location MAY NOT be the owning library.) Click on the "Continue" button. Remove the date due card. Place the item in the designated location for such materials at your branch.

Special Circumstances

A. **Item "on hold":** The borrower's name will appear on the screen, and the method of notification. Write the patron's name (last name first) on the appropriate "slip of paper" and place in with the item. Place the item on the hold shelf alphabetically by borrower name.

B. **"Fast Add" item needing cataloging.** The screen will display the checkin message:

Fast Add.
This item needs to be cataloged.

When this message appears, click on the “Continue” button. Note the “Destination” from the Checkin screen. **If the destination is YOUR branch**, place the item, with a “Returned Fast Add” flag, in the designated “To be cataloged, etc.” area at your branch. **If the destination is another branch**, place it in delivery with a “Returned Fast Add” flag.

C. No BCLS Barcode Label:

(i) If a BCLS item, AND the borrower is present, go to Check-Out and call up a list of the items currently checked out to the borrower. Determine the barcode number from this list, write it on the verso of the title page (or attach a note to AV or other items), go back to Check-In and check the item in by keying in the number. Place the item, with a “replace barcode” note, in the designated location at your branch for “To be cataloged, etc.” items.

If the borrower is not present, search the database, per Horizon manuals, and note the number of copies at the owning branch:

If the owning branch has only one copy checked out, note the barcode number for that copy and write it on the verso of the title page (or attach a note to AV items, and check the item in by keying in the barcode number. Place a “replace barcode” note in the pocket or (for AV) taped to the item. If it’s your branch’s item, place it in the designated location at your branch for “To be cataloged, etc.” items. If it is NOT your branch’s item, place it in delivery.

If the owning branch has more than one copy checked out, immediately give the item to a supervisor to deal with.

(ii) If a non-BCLS item, give it to a supervisor for handling.

D. Unscanable Barcode Label:

(i) If the printed numbers are readable, key in the barcode manually. Proceed based on whether successful check-in, etc. If it is a BCLS-owned item, put a “replace barcode” note with the item and place it on the “To be cataloged, etc.” shelf at your branch.

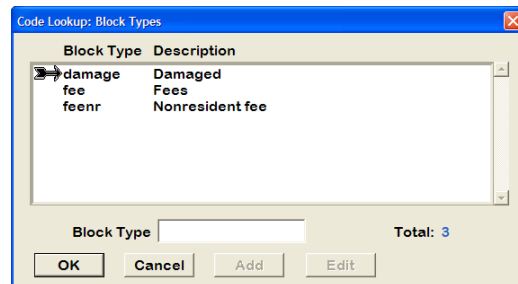
(ii) If neither the barcode nor the printed numbers are readable, proceed as directed under “No BCLS Barcode Label”, above.

E. Item Not Checked-Out: Remove any due date and place item on appropriate shelving cart.

F. Damaged Item:

If an item has been returned that has been damaged by the last patron to the extent that the patron will be charged the cost of the item, it needs to be checked in as Damaged. If the patron is NOT being charged the cost of the item, it can be checked in as normal and a checkin note added. **If the patron IS being charged something**, proceed as follows:

1. Check the item in using **“Damage Mode”** under CKI button on top of screen (NOTE: The only thing that "Damaged" checkin does is change the item's status to "damaged/billing".(Remember to unclick the “Damage Mode” button when done”)
2. Using “Damaged Mode” causes the system to “Show Borrower” on checkin. Thus the borrower’s name will appear next to the barcode prompt AND any existing blocks for that borrower will appear in a Current Blocks screen.
3. **If existing blocks do appear**, proceed to step 4.
If no existing blocks appear, search the database to find the item and use the "Detail Status" button at the copy screen to find the "Last Patron" info. Call up that patron in CKO. (This method is preferred over simply using the name that appears at checkout since two different borrower records could have the same name.)



4. From **Blocks** menu choose **Add Fee**.
5. Highlight **damaged** and click **OK**.
6. Enter the amount being assessed
7. In the comment section, enter details (including title & barcode) about damage done to book. Always initial all entries
8. Click **OK**.
9. If the patron is being charge the replacement cost of an item especially from another library system removes fines.
10. Change status of item as needed. (Remember: Checking in the item as "Damaged" will have already changed its status to "damaged/billing".)
11. Go back to the CKI menu to take the system out of “Damaged Mode”.

12. Send the patron the damaged item notice you would normally send from your branch.

If you do not know at check-in time what fee, if any, will be assessed, simply use the “Damaged Mode” option under the “CKI” menu. Select that item from the CKI list and click the “Edit Item” button. Write down the borrower’s name and barcode number from the “Prior Circ Info” displayed. Put this information with the item and set it aside for a supervisor’s attention.

13. The cost of the damaged item is ½ the retail cost for books and CD’s only. Everything else is charged FULL price. **SEE page 39** Full cost for other library systems. (If we pay full cost for an item patron pays full cost. Keep in mind condition and age of item. May have to ask department head for decision).

G. **“Claim Returned Found”**: The screen will display this message telling you a “claimed returned” is back. Click on “Continue” and place the item on the shelving cart.

Policy on “Materials Returned with Parts Missing”

Materials returned with missing parts are rendered unusable and can no longer be checked out to the public. Library staff will attempt by phone and /or by mail to contact the patron who had the material checked out so that the missing material can be located and returned. **The Library does not accept replacements parts for materials that are returned with parts missing.**

H. **You Discover Parts Missing from Multi-Part Items**: “Multi-part items” include books on CD, barcoded, book/Cd kits, other “kits” (such as Hooked On Phonics), etc. This policy also applies to items where the barcode is on the container rather than on the item itself (e.g., compact discs) when only the container is returned.

If the patron is present and you notice the missing part(s) BEFORE they leave the desk, hand it back to them and ask the patron to check for the part. Renew the item if necessary.

Procedure:

1. Do not check item in. The item stays on patron’s record until it is returned or paid for. If the item is not returned, Horizon will eventually change the status to “Lost” and the patron will be responsible for the replacement cost.
2. **If the patron is not present search by barcode and find last patron.**
 - A. Go to “New search”
 - B. Under indexes, go to “Barcode” and scan item barcode.
 - C. Click on “Show Copies”
 - D. Select item with correct barcode.
 - E. Click on detail Status
 - F. Copy title page of holdings record. At item detail status screen, click on “ctrl/alt/print” at the same time to copy screen.

- Paste info on word document.
- G. Go down screen until you see "Prior circ information" and click on "ctrl/alt/print" at the same time to copy screen. Again Paste info on word document.
 - H. Print screen and put with item in "Parts Missing" holding area at your branch. Horizon only holds prior patron information for 7 days so copy information as soon as you notice part missing.
 - I. Staff needs to notify patron of missing part by calling when time allows. After you call, go back to patron record and enter a message to notify staff that patron has been contacted.
 - J. At patron record, go to "Blocks"
 - K. Click on "Add Note"
 - L. Choose "Note—Comment" then click OK
 - M. Type in comment such as:

Parts missing for B OCD (title) (barcode #) Disc # __ not returned at check in at __ Library. Leave message as to outcome of call. (Left message, patron said they have it and will return...)

If you are unable to reach the patron, make a note of the time & date of the call, indicate "no answer", initial it, and place the item in the designated area. You may have to send out a Parts Missing letter if unable to reach patron.

- N. Place item in "Parts Missing" holding area at your branch. When item is returned **remove block from patron record** and check in.

If the patron pays for the item, they may take the part(s) we have, just as they do for damaged items.

If the patron says, "Oh, yeah, I forgot. I'll bring it back next time", add a "Comment" to the block and include your initials. Remember the renewal option, if appropriate.

If the patron says, "But I DID bring it back", treat this as you would any other "Claims Returned". Then add this comment to the "Claims Returned Block: "PART(S) MISSING: *brief description of the part(s)*"

Official Letter Out of Policies- Personnel

Below



www.baycountylibrary.org

Damaged Material and/or Parts Missing Letter

Date

Dear

The care and return of all items checked out from the Bay County Library System is the responsibility of the account owner. Our records show that recently one or more items checked out on your account was returned in one of the following conditions:

_____ **Damaged**

Replacement Price (s) will be charged to your account for the damaged item(s). If damaged materials are paid for and picked up within 30 days of this letter they are yours to keep.

_____ **Part(s) Missing**

Return the part (s) missing within 42 days and you will not be charged the replacement price for the missing item(s). After 42 days we do not accept returns of missing parts.

Please contact us as soon as possible to make arrangements to settle your account. Your cooperation in this matter will be greatly appreciated.

Sincerely,
Circulation Department
Bay County Library System

_____ **Auburn Area Branch Library** (989) 662-2381 x200
x200
235 W. Midland Road, Auburn, MI 48611

_____ **Sage Branch Library** (989) 892-8555
100 E. Midland Street, Bay City, MI 48706

_____ **Wirt Public Library** (989) 893-9566 x2100
3283 x200
500 Center Avenue, Bay City, MI 48708

_____ **Pinconning Branch Library** (989) 879-
218 Kaiser, Pinconning, MI 48650

| Title | Author | Charge | Discard |
|-------|--------|--------|---------|
| Date | | | |

Description of Damage/Parts Missing Material:

The Horizon system now **automatically renews** all BCLS materials twice as long as there are no requests. Other library systems have to be manually renewed. Adult discussion books, eBooks, eAudiobooks, or other downloadable materials will not be auto renewed.

I. **Request for renewal:** Click on the “Renewal” radio button at the Checkin screen. Scan the item barcode and click “Yes” when asked if the item is present. Be sure to include the new due date card (or appropriate substitute) with the item.

NOTE: If the borrower has already had the maximum number of renewals for that item, the system will block the attempt. Inform borrower of BCLS renewal policy and end the renewal transaction.

NOTE: If the item being renewed has been requested by another patron, quit the renewal and offer to place a request on the item for the borrower.

EXCEPTION: If the requesting patron is a BCLS branch, proceed with the renewal.

J. **“Do I have anything else out?”:** Borrower must present their library card, valid ID, or the proof. Go to CKO to produce the list. Print the screen if the borrower wants the list.

K. **Checkin Message: “Lost Item Found”**

Click on “Continue”. The borrower’s “Lost Item” block will be automatically credited. At this point you need to click on detail and scan down to locate patron name. Go to their account and remove refund.

L. Returned **“Paid for”** Lost Items We no longer issue refunds. Remind patron and ask them if they want the book back. If yes stamp with discard and make sure item is deleted from computer. Make copy of discarded item information for department head to consider replacement before deleting.

The system will notify you that a "Missing" item has been found. At this time, click on “show blocks”. Highlight the refund, and remove it by clicking the “block” radio key at the top of the screen and using the “refund” button. *“Refund of payment window will appear”*, click on “OK”. (Remember, when the borrower paid for the lost item, the system automatically changed its status to "Missing".)

If the borrower is not present, you are done.

If the borrower IS present:

Unfortunately, in this circumstance, you can **NOT** access the borrower's BURB by using the "Blocks" button at CKI. Ask the borrower for their library card, scan it at check out, and proceed as outlined in (Current Blocks Refund Due) under "Checking out Library Materials", above. (No Refunds) Quietly remove it.

BORROWER UNRESOLVED BLOCKS (BURB)

General Information

Borrower Unresolved Blocks, or **BURB**, is exactly that: a file in the Horizon system whose records contain information linking borrowers to “unresolved” matters. These matters consist of the following:

1. **Overdue items** (The Horizon system creates a BURB record for every item that is even one day overdue. The system will block the borrower at check-out with even one overdue item. See “Charging Out Library Materials” for override guidelines.)
2. **Fines:** **Fines are no longer accessed.** If you see previous fines quietly remove them.
3. **Claim Returned** (The Horizon system creates a BURB record whenever staff changes the status of a checked-out item to “claims returned”. It is generally overridden.)
4. **Claim Returned Recovered** The “claims returned block” goes to history if the item is checked in, but there is NO indication of when the CR came back.)
5. **Lost** (An item’s status can be changed to “lost” in one of two ways: 1) Automatically by the Horizon system when the book is **28days overdue** and, 2) Manually by the staff when a borrower declares they have lost an item.
6. **Deleted Requests** (This block is created whenever the borrower or a staff person deletes a title from the borrower's request list. The block moves to history within a day or two, after the system generates a notice to the patron.)
7. **Expired Requests** (The system creates a block when a borrower's request expires; i.e., when a requested title does not become available within the specified time period.)
DELETE
8. **Cancelled or Expired Holds** The Horizon system creates a BURB record whenever a borrower cancels a hold, does not pick up an item on hold, or when the hold expires [i.e., the item did not show up within the specified time period]. Continue CKO.
9. **Credit** (This is created automatically when a lost item, which had been paid for, is checked in. We no longer give refunds. Discretely remove refunds unless placed on by staff.
10. **Various manually created blocks** (These include messages, miscellaneous unpaid fees, overpayment credit, and the like.

Current Blocks

A screen showing the blocks for a borrower is displayed at CKO the instant the borrower's barcode number is scanned in at the borrower entry prompt, or when requested with the "Blocks" (in CKO) or "Show Blocks" (in CKI) button. This screen is called "**Current Blocks**". A "**BURB detail screen**" may be requested for any item listed by simply selecting that block and clicking the "Detail" button.

BURB History

When a BURB block/record is deleted or resolved, it often ends up in another file called "**BURB History**". The length of time it stays in "History" is determined by the type of block.

You can access BURB History by clicking on the "History" button at the Current Blocks screen, or by selecting "History Blocks" from the "Borrower" menu. (**Note: If the borrower has no current blocks, the "History" button will be inactive and you must use the menu option to access BURB History.**)

Declaring Items "Lost" and "Claims Returned"

Lost: If, during the checkout process, a borrower states that an item(s) is lost, go to the borrower's list of items out and declare the item "LOST", per Horizon Manuals. If the borrower wishes to make a payment, proceed as described below under "Payment for Lost Items". Before you set an item to LOST **do a shelf check**. Then if not located remind patron that there will not be a refund if the item is located at a later date. It is theirs to keep.

If the borrower wishes to declare an item lost when not checking out, enter their barcode number at the borrower entry prompt in CKO and proceed as above.

Claims Returned: If, during the checkout process, a borrower claims that an item has been returned, go to the borrower's list of items out and do a library shelf check to make sure the item is not here. The option of renewing item to allow patron time to locate is a good option. If not located declare the item "Claims Returned". If the borrower wishes to declare an item "Claims Returned", enter their barcode number at the borrower entry prompt in CKO and proceed as above.

NOTE: LIBRARY POLICY ALLOWS ONLY TWO INCIDENTS OF "CLAIMS RETURNED'S" PER BORROWER. (An "incident" is one item only.)

IMPORTANT NOTE: Before creating a claims returned, examine the borrower's current blocks AND history blocks. If the borrower has two or more "Claims Returned", the new claim will not be honored. Also do a shelf check to make sure not on our shelves before continuing. NO CLAIMS RETURNED FOR materials not in BCLS.

Non-BCLS-Owned Material that have been Lost and Paid For:

Money paid by patrons for non-BCLS-owned material (**yellow banded**) that has been lost will not be refunded. When a BCLS patron loses material owned by another library the BCLS is billed by and pays the owning library for the material. These payments by the BCLS to owning libraries are non-refundable to the BCLS and posted on patron's record.

Overdue Fees

No longer charge fines for bcls or other libraries.

Fee Structure

Photocopies: Black & white \$0.15

Color Photocopies: \$1.00 (available at Wirt only)

Printer copies: Black & white \$0.15

Color Printer copies: \$0.50 (available at Wirt only)

Microfilm/fiche copies: \$0.25

Bcls Lost/Damaged materials: Books and BOCD's we get a discount on at purchase so we charge one half cost.

Full cost for any material that we pay full cost at purchase. Example is Playaways, Wonderbooks, all Special collections, Board games. IF the library can replace a missing part in the item patron will be charged for only that piece. Materials from other library systems we charge off their invoice. No deals

Collection Agency Fee \$10.00

-

Payment for Lost Items

BCLS POLICY

Patrons with overdue material will receive a first overdue notice via a text, e-mail and mail after 7 days. A second overdue notice via text, e-mail and mail is transmitted after 14 days. **A final overdue notice is sent by mail after 21 days.** If a patron has an overdue balance greater than \$75, the account will be turned over to a collection agency. The collection agency will make several attempts via telephone, mail, or e-mail to advise the patron of their responsibility for returning the material and settling their account with the Library. If the material goes unreturned for 6 months, the patron will be credit reported. The patron will be responsible for paying all credit agency fees, and any other fee that may accompany item.

Remind patron that once they pay for an item there is no refund. Ask them if they want to look one more time before paying ALSO check owing libraries shelves!

If the items have already been set to "lost", proceed as described in "Overdue fees", above. If the borrower is paying only on specific items, payment must be made from the detail screen for each item.

When paying for lost, damaged or parts missing material, the policy is that we charge ½ the retail cost of an item in which we get a discount on at purchase (books). Otherwise we charge full cost for everything else. If item is older and used ask department head what to charge. Special collections see: page 18 chart on costs.

If the borrower has come in with an overdue notice or "bill" and wishes to pay for lost items, these items MAY first need to be declared "lost", as described under "Declaring Items Lost or Claims Returned", above. Then proceed with payment.

Remind patron that you will be able to print out a receipt, (if requested), by checking the “Print Receipt” box on the “Fine Payment” window. If you discover AFTERWARDS that the patron wants a receipt, you can still “manufacture” one in the following manner:

Go to the “Borrower” menu and select “Payment History”. The “Payment History Selection” dialogue box will appear.

Today’s date will already appear in the “Since date” field of the dialogue box. Simply click on OK.

A window showing all payments made since that date (i.e., today) will appear. Use the “Print” command to print this window. **YOU WILL NEED TO ADD THE PATRON’S NAME TO THE PRINTOUT.**

Credit Card Payment process:

\$5.00 Minimum to pay with credit/debit card. Accepts Visa, American Express and Discover Cards

1. Turn on Device (circle in middle bottom) [Plug in BOTH square and iPad at night](#)
2. Slide screen to unlock Device.
3. Enter Passcode - "1,2,3,4"
4. Make sure connected to Wi-Fi, if not sign in.
5. Find Square App on Device "Register" **(If you should accidentally log off do 5 thru 6)**
6. Sign into Square Account.
 User Name: kayala@baycountylibrary.org
 Password: envoy2008
7. **Select "All Items" to get payment options**
8. Select Department. (Donation, Lost/damaged Item, Other, Over Due Fines)
9. Enter dollar amount, press "+" sign, charge is ready.
10. Press "Blue Charge" button.
11. You are ready to swipe card or insert card (if chip card).
 - swipe/insert card with magnetic strip on the backside or facing away from you. **(if chip insert does not slide, and wait until info comes up)**
- 12 Have Patron Sign With Finger

13. Can Email receipt to Patron OR Hit "NO THANKS"

14. HIT ALL DONE

**Turn off iPad Upper iPad
top Right hand edge small impression**

To Reset a Payment Option:

1. Click on "Current Sale"

2. Click on "Clear Item"

No Cash register use. Receipt sent email or Horizon if needed.

Payment by Phone: We are taking payments by phone.

VISA

1. In Horizon verify patron by asking questions. (birth date, address...).
2. Instead of swiping card, tap on area and a keypad will appear.

Type in

1. card number
2. Expiration Date (MM/YY)
3. CVV # on back right after signature.
4. Zipcode

Tap CHARGE If it comes up for signature sign **phone**

AMERICAN EXPRESS: Cvv numbers are on the front and there are 4

Issues:

- **Paid with Visa and then we found the book on our shelves.**
What do I do? Have Erica cut a check for the amount and call the patron and explain.
- **Card will not scan: Is square pushed in all the way.**
- **To CLEAR the amount and get back to the beginning:**
 1. Click on No Sale at top of iPad
 2. Touch **"O" with v** inside to open options
 3. Touch Clear items

• Choices

- **Donations:** ANY Monies donated to the library Memorials, Gift of Reading (over \$5.00)
- **Lost/Damaged Items:** Payment for items
- **Other:** Copies, Friends materials, Sales,
- **Over Due Fines:** Fines NO

Refunds

Select that item from the list of blocks and choose “Refund” from the “Blocks” menu. **Remember no refunds on LOST/Damaged/PARTS MISSING items. Quietly remove them by “Waiving” the amount.**

Other manually entered refunds by staff can be given as needed.

“Cancelled Holds”

See “HOLDS” in this manual.

Guidelines For Creating “Special Message”, “See Supervisor” and Other BURB Blocks/Records

When creating any block, be aware of the default “Action” value (a set of radio buttons on the block-creating screen) for that block. Some blocks default to the “Print” radio button, meaning a notice will be generated for mailing when day-end processing runs. Others will default to “None”, meaning no notice will go out. Staff can change the value by clicking on the appropriate radio button.

“**Special Message**”: Generally, these blocks will be used as reminders as needed. The default action is “None”

“**See Supervisor**” blocks should be created only for those situations that require supervisory attention. The default action is “None”

“**Fees**” The default action is “Print”

“**Address Correction Required (No Notice)**” will be created when a notice mailed to the borrower is returned by the post office. The default action is “None”

GUIDELINES FOR DELETING BLOCKS

BURB blocks should be deleted at the BURB detail screen. (See detailed procedure in the next section.)

1. **Overdue Items**: The Horizon system will not allow them to be deleted. Once the items are returned, this record and block will be automatically removed by the system. These items may be changed manually by staff to “Lost” or “Claims Returned” (see above).
3. **Claims Returned**: If a “claims returned” is recovered, the BURB record goes to History.
4. **Lost Material**: There will be a dollar amount associated with this record (**if it has not been completely paid or waived**). The Horizon system will not allow you to delete a BURB block/record with a dollar amount attached. The Horizon system will automatically resolve the block and remove the BURB record when the dollar amount associated with it is down to zero. REMEMBER if an item is LOST and the patron pays for it, there is NO REFUNDS. ALWAYS do a shelf check if patron is unsure.

5. **NSF Checks:** A patron is allowed only one non-sufficient funds check. When they give us a second nsf check, we will no longer accept checks from them. A supervisors' block will be entered stating this along with where they can pick up their previous checks.
6. **Damaged Item:** Same as "Lost Item", above. Hold damaged item for 30 days then discard.
7. **Cancelled Holds:** Delete as you come across them. No comment to patron needed.

6. **Various Manually Created Blocks**

Blocks/records in the "**Miscellaneous Fees**" category, cannot be deleted as long as money is attached to them. Once the amount is down to zero, the block/record is deleted automatically.

Blocks/Records in the "**Special Message**" category are deleted once they have served their purpose. This is, of course, a discretionary call and will vary by the nature of the block. See, in particular, our computer use staff guidelines for blocks pertaining to abuse of the library's computer policy.

Blocks/Records in the "**See Supervisor**" category will be deleted by a circulation supervisor or Branch Librarian only.

"**Address Correction**" blocks may be deleted once the correct address is determined.

DELETING BLOCKS

At the "Current Blocks" screen:

1. Select the block to be deleted and click the "Detail" button.
2. At the detail screen, click the "Delete" button.
3. At the confirmation message, click "OK" to complete the deletion.

CLAIMS NEVER CHECKED OUT

When a borrower claims that he/she never checked out items, ask the borrower if it is possible they were checked-out for someone else, or if someone else was given his/her library card to use, or if someone else could have had access to the library card.

If one of the above is the case, politely remind the borrower about the responsibility statement on their card. Also call department item is from and do a shelf check.

Self-Registration Procedure at circulation desk for card pickup:

- Ask for patron's ID and have them fill out a registration form just as before. Minors still need guardian signature and ID.
- Look up their name keeping in mind that they might have more than one card and it might have errors.
- Card examples:
 1. A card that has been registered in the past and used. (GOOD CARD USE THIS)
 2. A High School Card. Good card but don't use
 3. A self-registered card...maybe more than one. Get rid of card if # 1 is available and this card has no holds.

Where to find the self-registered Patron cards:

- A. last name, first name
- B. First name, Last name
- C. Last name,First name (**No space** after comma will put name at the end of the last names)

1 & 2 are ok to have together at the same time. If they have a card already and a self-registered card, get rid of the self-registered card, checking for holds first. If there are holds transfer them to the card you keep. But not to the High School card!

- Remind patrons with more than one self-registration card that they do not register every time they want to use the system.
- Check to see if patron changed their "preferred pickup library". This is where their holds will be sent. Show them where to go on Enterprise to do it themselves.
-

Updating Patrons account: If there is no other account but the self-registered account edit.

- Go to edit borrower and begin editing with completed registration form.
- Library Card: Set self-registered card to lost & issue new card
- How notices are received
- Birthdate
- BType
- Stat Classes
- All errors noticed in name, address, and punctuation.

2-9-2018

SELF REGISTRATION ISSUES

If a patron has self registered and has holds on that account but also has an active library card, you need to transfer the holds to the original library card and discard the self registered library card. **UNLESS** patron has checked out ebooks..... then the card have to be merged by AJWPL Fiction department

Horizon key board “F” keys Need to be in CKI/CKO

F1= Microsoft word Help

F2= Material Indexes (Title, Subject, Author)

F3= _____

F4= Search Borrowers

F5= New Patron Record

F6= Edit Borrowers record (have to have patron name up)

F7= _____

F8= Checkin / Checkout toggle key

F9- F12 _____

F11= Receipt printer

Reports & Forms

MEL Inn-Reach paging slips

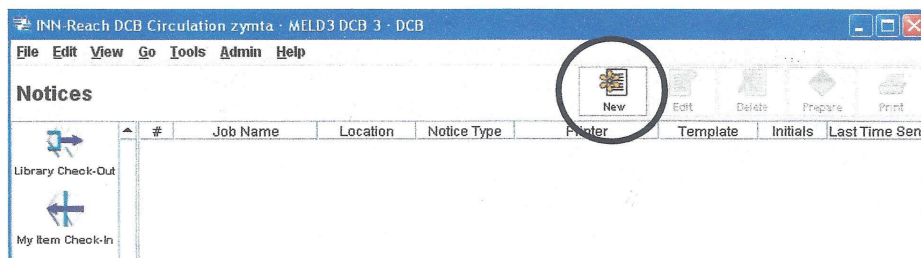
Run only in the morning
Preparing the MeLCat INN-Reach paging slips

- a. Username: **zv024b** password - *05melcat*
b. Initials: **dcb** password **dcb**

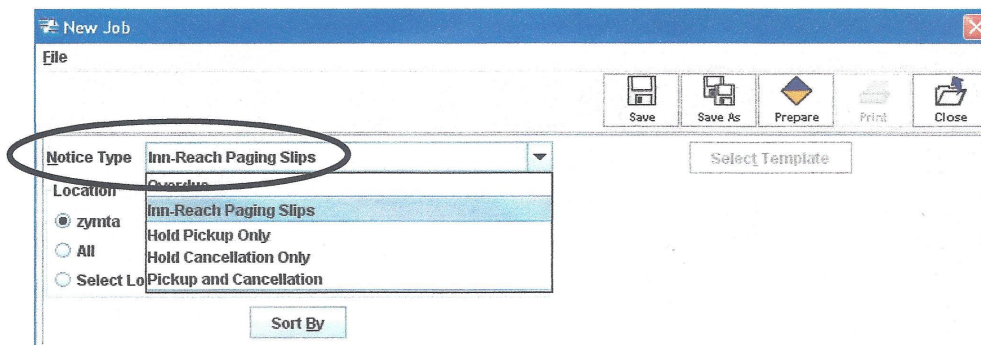
1. Click on "Notices" mode on the left.



2. Click on "New"



3. Under Notice Type: select "INN-Reach paging slips"



4. Click on "Prepare"

New Job

File

Save Save As Prepare Print Close

Notice Type Inn-Reach Paging Slips

Location

☒ zymta

☐ All

☐ Select Location

Sort By

Select Template

5. Select "Local Printer" from the pop-up and click on "print."

Select Form Printer

Current Printer: Send to email address
Email Address: licalzj@mcls.org

Select Form Printer

(none)

Local Printer

FTS file save

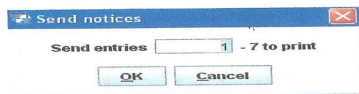
Send to email address

Print Cancel

6. Once the list of slips appears, click on "Send Notices" button in middle of screen.

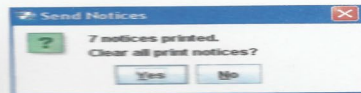
| <div> <div>Send Notices</div> <div>to Print</div> <div>Move All to Print Queue</div> </div> | | | | | |
|---|----------|----------------------|--------------------------|--------|-------------|
| # | Notice # | Patron Name | Title | Call # | Item Status |
| 1 | 1 | Malone, Sam "Mayday" | iii zymta cheetah test | | MEL PAGED |
| 2 | 2 | Malone, Sam "Mayday" | iii zymta crow test | | MEL PAGED |
| 3 | 3 | Malone, Sam "Mayday" | iii zymta beaver test | | MEL PAGED |
| 4 | 4 | House, Gregory | iii zymta alligator test | | MEL PAGED |
| 5 | 5 | House, Gregory | iii zymta bison test | | MEL PAGED |
| 6 | 6 | House, Gregory | iii zymta buzzard test | | MEL PAGED |
| 7 | 7 | House, Gregory | iii zymta camel test | | MEL PAGED |

7. Click OK on pop-up box.



STOP! Check to be sure all the notices printed.

8. Confirm that paging slips were successfully printed, and then click "Yes" to clear them.



9. Click on "Close"

Request Pull List

It is recommended that this report be run at least three times each day. It will list those items on your shelves that have been requested by borrowers at other branches. Staff person running report needs to login in under their personal security code to gain access.

1. At the Circulation Window on the Left side of the computer

Request Pull List

Requests

Hold Shelf

Expired/Canceled

Today's Bookings

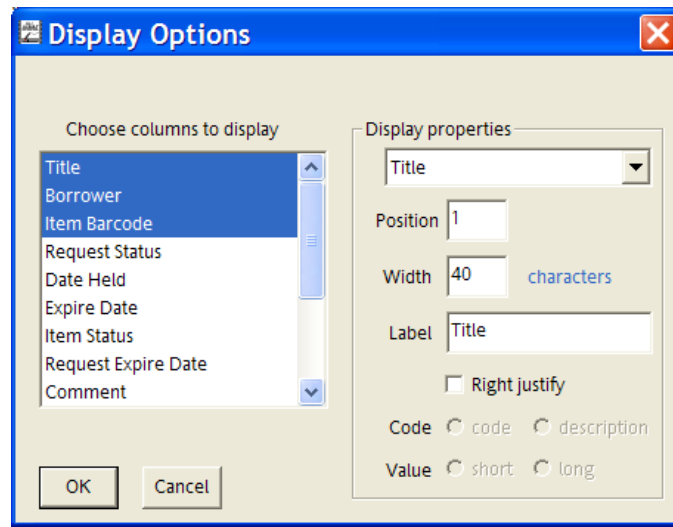
2. Click on "Circulation Reports"
3. Click on Requests – Then click "Request Pull List"
4. After Pull List comes up click on Display box – Click Un-highlight "comment" and "request type". Click OK
5. Click Sort – Then in order click on Collection, Call number, Author, and Title.
6. Click OK
7. Click on File>Print. Click on properties, change to landscape. Click OK
8. Numbers of copies ____ Click on OK when print warning comes up.
9. X out of page and then click on YES Take copies to needed departments

Printing Expired/Canceled List

Before you start you need to login under your Horizon login using your personal password

In the left panel in Horizon, open “Circulation” and click on Circulation Reports.

1. Open Requests on top of screen
2. Click on “Expired canceled”, after a moment a list will appear, this needs to be placed in order if your branch has a lot to pull.
3. Limiting Items Displayed”
 - A. Click “Display” on bottom of screen to edit only items you want on report.
 - B. Under “Display properties” (Use pull down) Leave only items highlighted that you want to display on final report. (Title, Borrower, and Item Barcode usually chosen) To arrange order in which they appear, click on pull down arrow and highlight item. Then choose a number position and click “OK”. Go back into Display and do the same for your other choices until they are in the order you want.
 - C. Choose “Sort” button to put them in alphabetical order. Highlight choices in order in which you want them to appear on report. (Borrower, Title, Item barcode for easy pulling). Click “OK” to put them in alphabetical order.
 - D. To print, go to file on left top of screen. Click on print change orientation to Landscape and OK again to print.



Expired/Cancelled Holds Report

Before you start you need to login under **your** Horizon login using your personal password

This report will be printed each morning at each branch (see Horizon manuals for details.) It will list which items on your hold shelf:

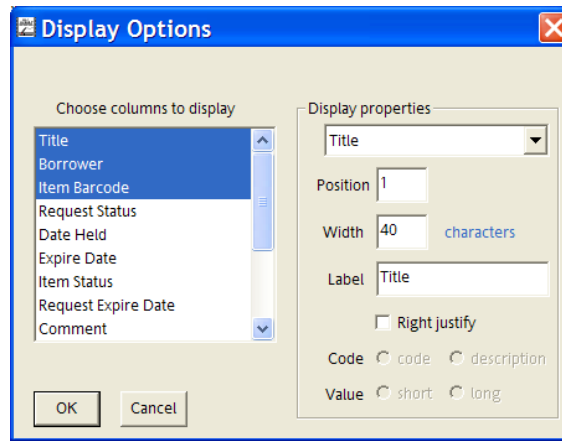
1. Have expired and are to be re-shelved or returned to the owning library.
2. Have expired and are to be held for another borrower listed on the report.
3. Have expired and are to be sent to another branch or library.

Printing Expired/Canceled List

Before you start you need to login under **your** Horizon login using your personal password

In the left panel in Horizon, open “Circulation” and click on Circulation Reports.

1. Open Requests on top of screen
2. Click on “Expired canceled”, after a moment a list will appear, this needs to be placed in order if your branch has a lot to pull.
3. Limiting Items Displayed”
 - A. Click “Display” on bottom of screen to edit only items you want on report.
 - B. Under “Display properties” (Use pull down) Leave only items highlighted that you want to display on final report. (Title, Borrower, and Item Barcode usually chosen) To arrange order in which they appear, click on pull down arrow and highlight item. Then choose a number position and click “OK”. Go back into Display and do the same for your other choices until they are in the order you want.
 - C. Choose “Sort” button to put them in alphabetical order. Highlight choices in order in which you want them to appear on report. (Borrower, Title, Item barcode for easy pulling). Click “OK” to put them in alphabetical order.
 - D. To Print, go to file on left top of screen. Click on print change orientation to Landscape and OK again to print.



Request Pull List

Before you start you need to login under your_Horizon login using your personal password

It is recommended that this report be run at least three times each day. It will list those items on your shelves that have been requested by borrowers at other branches. Staff person running report needs to login in under their personal security code to gain access.

10. At the Circulation Window on the Left side of the computer

11. Click on “Circulation Reports”

12. Click on Requests – Then click “Request Pull List”

13. After Pull List comes up click on Display box – Click un-highlight comment and regu type. Click OK

14. Click Sort – Then in order click on Collection, Call number, Author, and Title.

15. Click OK

16. Click on File>Print. Click on properties, change to landscape. Click OK

17. Numbers of copies ____ Click on OK when print warning comes up.

18. X out of page and then click on YES Take copies to needed departments

Request Pull List

Requests

Hold Shelf

Expired/Canceled

Today's Bookings

PROCEDURE FOR REQUESTING A NEW HORIZON **CITY CODE**

If you are entering a new borrower and a city code does not exist in Horizon for the needed city then:

1. Type the city and State in the “Line 4” of the Addresses blink of the borrower record.
2. Type in or select the “temp” city code from the list of codes.
3. Send an email to citycode@vlc.lib.mi.us and include the following information
 - A. Name of Borrower
 - B. Borrower barcode
 - C. City and State

The new city code will be entered in Horizon for that borrower, but you will NOT receive a reply to your email. New city codes will normally be entered within two business days.

- Before you send information check the list carefully. Sometimes Cities are in order spelled out, such as (ST. Claire Saint Claire). Look around carefully.

VLC Monthly Reports
(WEB reports)

RIS

Received directly by designated individuals at each branch. This is a list of items from the previous month which have a status of Lost, Claims Returned, Missing, or Transit.

BSA – Sarah, Jill

BBC – Jane, Janice

BAU – Sheila, Deb

BPI - Marilyn, Katherine

ITEMS FLAGGED FOR REQUESTS

Received by Jill and distributed to the appropriate branch. This list is for items which have been scanned for a request and have a status of “transit request” but have not made it to the requesting library.

UNAVAILABLE REQUESTS BIB Level and SPECIFIC copy

Received by Jill and distributed to branches. This is a list of requested items (bib level and specific copy) whose status has since changed to one that will not fill the request. (lost, missing damaged, etc.)

HIP ACR (address check)

Received by Jill and distributed to appropriate branches. This is a list of patrons who have indicated through HIP that they need an address correction. (Sometimes if there are very few of these I just have someone at Sage take care of them rather than distribute the list)

LOST ITEMS NOT LOST

Received by Jill. This is a list of items that for some reason are still on a patron record as lost but do not have a status of lost. There are VERY few of these and I take care of them myself.

Items filling request that have not arrived at the pickup location

The VLC will begin running a monthly report of items that have been flagged to fill a request, but that have not made it to the pickup location. Some of these items have a status of "Transit Request." Some of them have statuses other than that and need to be dealt with in a different way. Regardless of the status, as long as the system thinks there is an item captured to fill the request, the request will keep the status of transit and will not be filled by another available item or expire.

Items flagged to fill a request with the status of "Transit Request"

Items that are in transit to fill a request have a status of "Transit Request" (th). For however long the item has that status, the system will think the item is filling the request. If the item has been searched for and cannot be found, libraries should be changing the status of the item so that another item (when available) will fill the request. If your library has a "Transit Request" item that has been searched for and cannot be found, please do the following:

1. Check the item out to a borrower (yourself or other staff card.) When prompted, confirm you want to proceed and then indicate you want to renew the first borrower's request. (This will put the borrower back into the request queue with a proper request status without the item# so another copy can potentially fill the request.)
2. Do a damaged check in of the item (this will prevent the item from filling a request) — *only way* —
3. Change the status of the item to trace or missing (or whichever status you use for items you can't find)

Items flagged to fill a request with a status other than "Transit Request"

When an item has a status of something other than "Transit Request" (th), but the system still thinks the item is filling the request.

1. Check the item in (in the normal mode).
2. Check the item out to a borrower. When prompted, confirm you want to proceed and then indicate you want to renew the first borrower's request. (This will put the borrower back into the request queue with a proper request status without the item# so another copy can potentially fill the request.)
3. Do a damaged check in of the item. (This will prevent the item from filling a request.)
4. Change the status of the item to trace or missing (or whichever status used for items that cannot be found.)

Items flagged to fill a request that have the incorrect itype

Occasionally, items are checked in and flagged to fill a request (given a status of 'th') because they have the wrong itype. If you do not want to send the item, you must do the following:

1. Change the itype of the item.
2. Check the item out to a borrower (yourself or other staff card.) When prompted, confirm you want to proceed and then indicate you want to renew the first borrower's request. (This will put the borrower back into the request queue with a proper request status without the item# so another copy can potentially fill the request.)
3. Check in the item. The itype should prevent it from filling a request outside of your library.

UNAVAILABLE ITEM SPECIFIC REQUESTS

Horizon requests on **specific items** that are no longer available. Our procedure is:

For borrowers with YOUR BRACH as the location (OR AS THE PATRON!), look the item up in the catalog and determine if there is another copy of that exact same item (e.g., the May 2005 issue of Good Housekeeping) on which a request can be placed.

If another copy of that same item is available:

- Check the request list and note the pickup location for this patron.
- Delete the original request **and then** delete the "Request Deleted" block that will have just been created for that borrower.
- Place a request for the borrower for that item using the pickup location noted and, in the "Comment" field of the request, enter "ORIGINALLY REQUESTED ITEM BECAME UNAVAILABLE."
- **Note:** If it is clear that a bib-level request (instead of an item specific request) would be appropriate, do that instead.

If another copy of that exact same item is NOT available:

- Determine if a bib-level request (instead of an item specific request) would be appropriate. If so, proceed as indicated above.
- If a bib-level request would **NOT** be appropriate, delete the request. Then go to the "Request Deleted" block that will have been created and enter a comment: "REQUESTED ITEM BECAME UNAVAILABLE".

That's it. As always, please call if you have any questions.

UNAVAILABLE BIB LEVEL REQUESTS

Horizon requests on BIB records for which there are no available items. Our procedure is below. **For borrowers with YOUR branch as "Location" (OR as the Patron!):**

- Call up the patron by name.
- From the patron's request list, select each of the titles listed and delete the request.
- In the patron's BURB, add the following comment to each of the Request Deleted blocks for the titles you just deleted: LAST COPY BECAME UNAVAILABLE

That's it. As always, please call if you have any questions.

HIP Address Correction Blocks

Monthly, VLC sends out a report of "Address Correction Requested" blocks that were generated by patrons who checked the "Address Correction" box in the public catalog. (At the borrower's BURB screen, this block includes the comment "Requested through iPac.") The block that is created by this is the type of address correction block that suppresses notices from being sent.

Thus, when we receive the report, our job is to:

1. Note the date on which this block was created and then DELETE the block.
2. Add a "notice sent" address correction block for that patron. When creating that block, include the comment: **ORIGINALLY REQUESTED VIA HIP ##-##-##**. (The ##-##-## is, of course, the date on the original block.) Also, be sure to click the "None" option for "Action".

Below you will find this month's report listing ALL Bay County locations. Please make the necessary corrections for those borrowers from YOUR branch.

As always, please call if you have any questions.

Trouble Shooting:

Telecirc: NO LONGER AVAILABLE

Trouble Shooting:

Item Missing. (Item status) = **settom** (status code) probably lost in building somewhere

Item Missing (no period after) = Item that was paid for by patron

Cannot delete a missing or lost item

Access Type APPROVED: In Patron record. This allows you to "Block" a patron who has been banned or suspended for ANY reason from checking out materials. If status changes you need to go in and remove check mark next to approved status.

Default Location Change: Default Location, Horizon will supply the code for your default branch. The circulation supervisor at each AJW branch or VLC help desk can edit this when needed.

LIBBY Listening books are now moved to Overdrive 2024

Dynix Items: This appears in a Patron's books. To see it you have to go into the block using "Detail" at the bottom of the page. It is the policy to **waive**

Dynix items. Dynix items occurred when the old Dynix system was merged into our current Horizon system and there were some problems. They are usually in the late 1990's. If you see these don't announce to patron what the problem is. Make it sound like you are doing them a favor- but remove them all. *I think these have all been removed from the system*

Under Borrower "Search this location only" If it is checked marked the system will look only at the chosen branch for Borrower. Have to uncheck to do a system search

BCLS Branch Codes and numbers that represent them:

BHQ 1 Is Administration

BSS 2 Is Southside Branch Library Attached to Garber High School

BSA 3 Is Sage Library

BBK 4 Is Bookmobile

BAU 5 Is Auburn Branch

AJWPL/BBC 6 Is Alice and Jack Wirt Library (Bay City Branch Library)

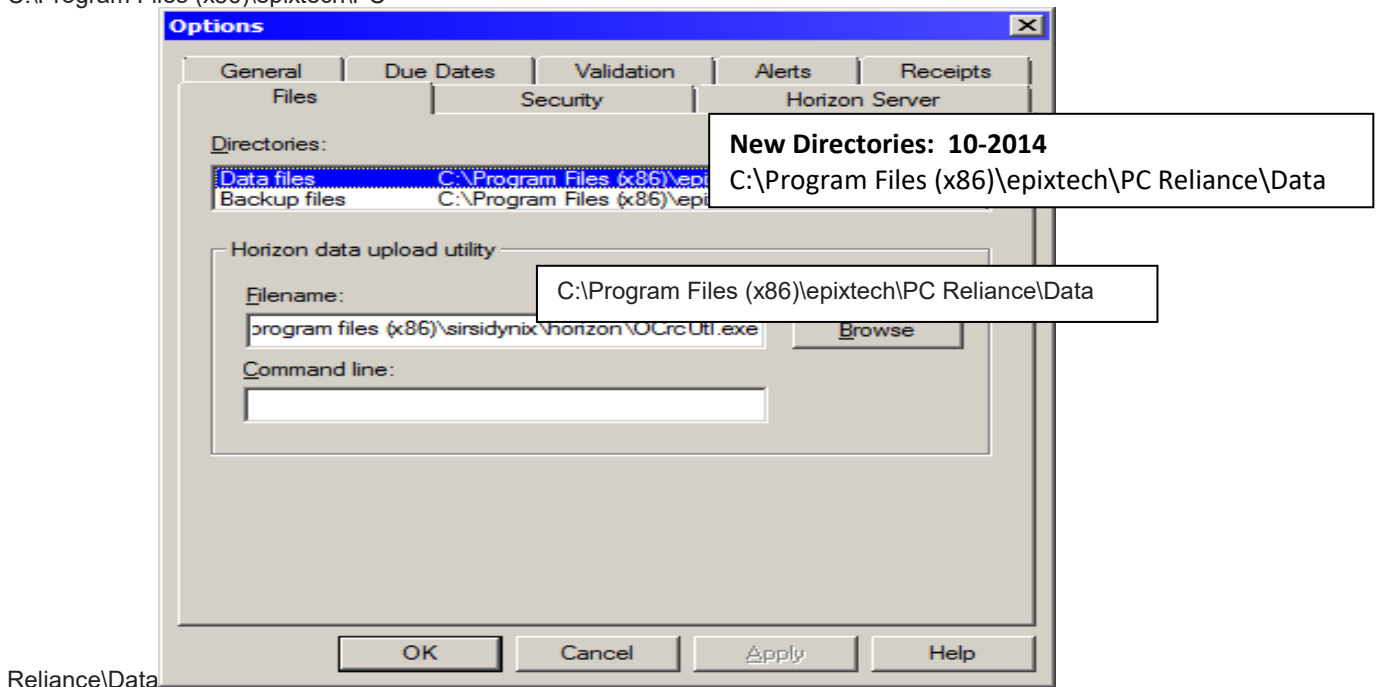
BPI 7 Is Pinconning Library

Uploading PC Reliance From Horizon

- Close the PC Reliance window
- Bring up Horizon, logging in with your personal username and password
- Click on **Circulation**, then **Off-Line Circulation Control Menu**
- Choose **Off-Line Circ Upload Utility**
- Call the VLC (1-989-497-0925, ext 0) **After Hours 989-996-5593**
- Click on File in the top left hand corner of Horizon
- Go to **Tools** then **Options**
- When told to by the VLC, choose **Upload Transaction file**. The file you want is located in **My Computer > Local Disk C:\Program Files (x86)\epixtech\PC Reliance\Data (updated 10-2014)**
- Or it will come up with a file

CAN use computers to check in and out and

C:\Program Files (x86)\epixtech\PC



Reliance\Data

When you click on this folder Inside will be Reliance.DAT

- The VLC will process the file and tell you to run the Exception Report (this is under **Off-Line Circulation Control Menu > Off-Line Circ Exception Report**)
- VLC will automatically clear the exception report after running
- Open PC Reliance, click Next > It will ask if you want to delete existing data, click on that. You will be prompted for a password – it is: telxon

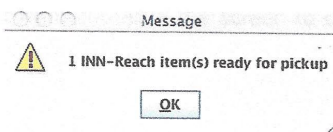
Check-Out item to patron

- Select '**Patron Check-Out**' mode

- Search for patron record using one of four options: patron barcode, unique ID, patron record number, or name.
 - By Barcode:
 - Enter patron barcode
 - If the patron barcode is more or less than a 14-digit numeric barcode, or contains any letters or symbols, you must enter 'b' before the barcode.
 - b312345
 - By Unique ID:
 - Enter 'u' followed by the patron's barcode and your library's 5-digit agency
 - u3123456zv111
 - By Patron Record Number:
 - Enter '.p' followed by the record number
 - .p11231920
 - Be sure to include the period before the 'p'
 - You may need to add an 'a' at the end as a wildcard if the final check digit is missing: e.g. .p1123192a
 - By Patron Name:
 - Enter 'n' followed by last name, first name
 - nhackett, joe

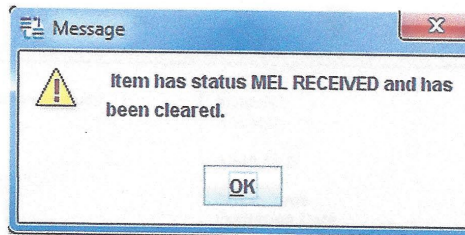
- Click 'Search'

A pop-up message appears saying, "INN-Reach item ready for pickup."



- Click 'OK'

- Enter the item barcode to check out the item to the patron.
 - [Note: If the item barcode is not a 14-digit numeric barcode, or contains any letters or symbols, enter 'b' before the item number.]
- Click 'Search'



- Click 'OK'

INN-Reach DCB Circulation zymt3 · MeL DCB 1 · DCB

File Edit View Go Tools Admin Help

Patron Check-Out

INN-Reach DCB

Patron Check-Out

Key or Scan Item or Patron Barcode

Search

Name: Hackett, Joe
Barcode: 2233445566
Address: Nantucket

Patron Type: 10 DCB Test Patron
Expiration Date: 12-31-2020
Current Checkouts: 0
Manual Block: - NO MANUAL BLOC

Check Out (1) Checked-Out Items(0) Requests(7) **INN-Reach(8)**

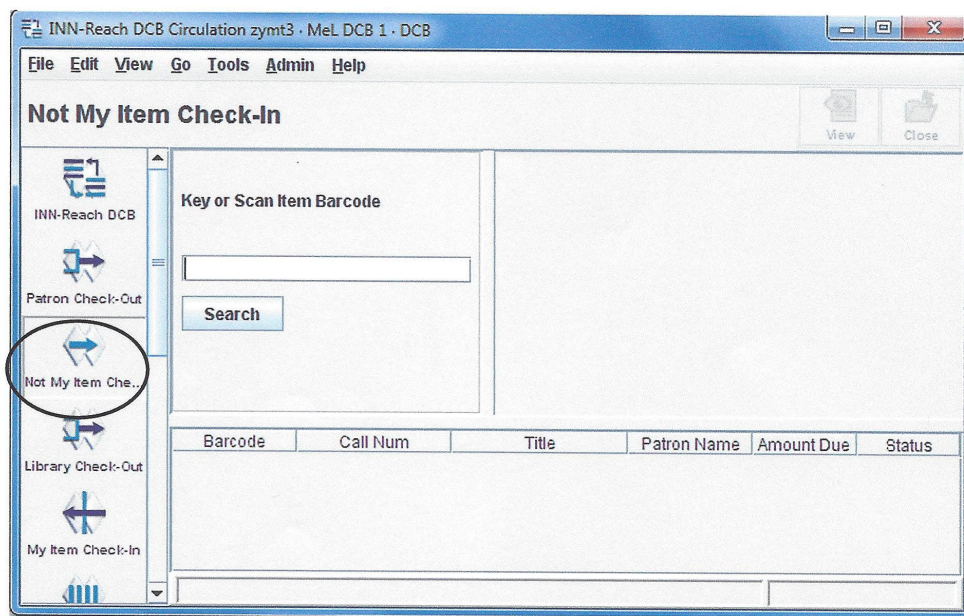
| Barcode | Title | Due Date | Status |
|---------------|-----------------------|-------------|--------|
| 36951368zymt2 | iii zymt2 lowell test | Dec 12 2011 | |

The patron Due Date is assigned.

- Click 'Close' in the upper right corner of the screen to close the patron record.

Check-In item upon return

- Select '**Not My Item Check-In**' mode



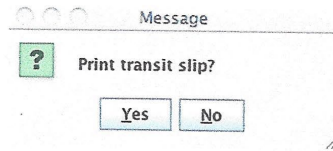
- Enter the item barcode
 - [Note: If the item barcode is not a 14-digit numeric barcode, or contains any letters or symbols, enter 'b' before the item number.]
- Click 'Search'

A pop-up message will appear indicating the Lending Library.



- Click 'CHECK-IN'

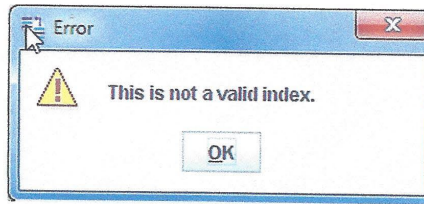
A pop-up message will appear:



- Click ~~No~~ "YES "

The item status is now *MeL Returned*.

- **If an optional duplicate checkout was created on your local system, check the item in on your local system.**

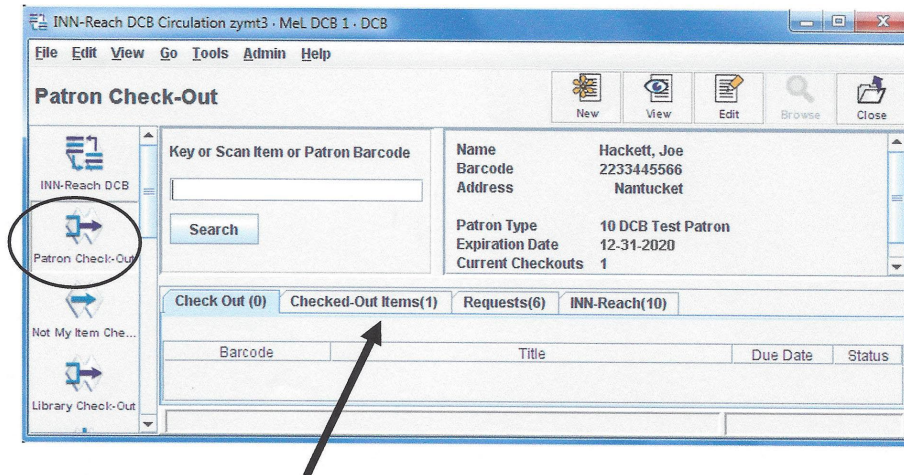


This error message indicates that the barcode entered is not correct. Verify:

- The barcode was entered correctly.
 - Does the barcode on the item match the paging slip?
 - Does the barcode require 'b'?
-

Renew an item for a patron

- Select '**Patron Check-Out**' mode
- Enter the patron barcode, unique ID, patron record number, or name.
- Click 'Search'



- Click on 'Checked-Out Items' tab
- Highlight the line of the item to be renewed
- Click 'Renew'

A pop-up will tell you how many days the item is overdue. If you select 'No', the item will not be renewed. You need to acknowledge by pressing 'Enter' or clicking 'OK'.

If you select 'Yes', a pop-up will notify you the item is renewed.

- Click 'OK'
- Close the patron record

The new due date will be calculated by adding 21 days from the date the item is renewed, and the item status will change to *Renewed*.

Search 'Renew an Overdue Item' on the MeLCat Wiki for more information.

You can only renew MEL items one week before due date and the day the item is due.

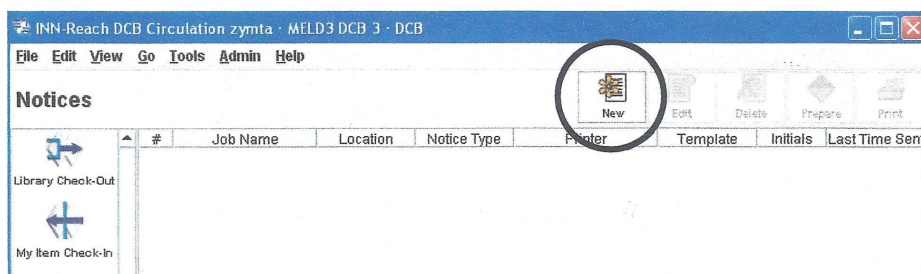
Run only in the morning
Preparing the MeLCat INN-Reach paging slips

- a. Username: **zv024b** password - 05melcat
b. Initials: **dcb** password **dcb**

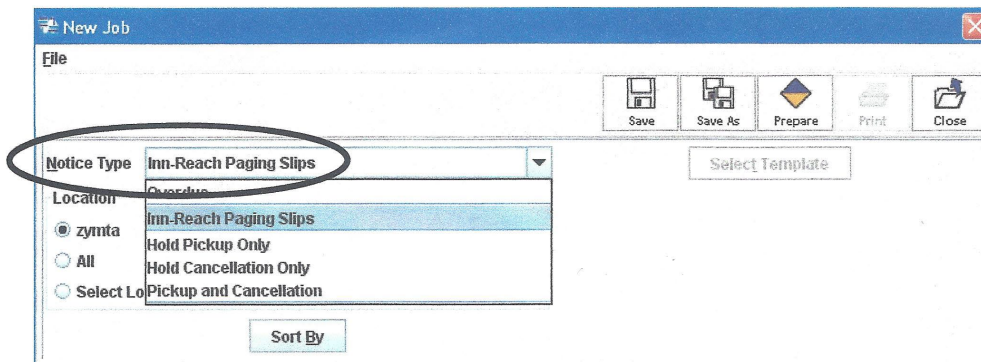
1. Click on "Notices" mode on the left.



2. Click on "New"



3. Under Notice Type: select "INN-Reach paging slips"



4. Click on "Prepare"

New Job

File

Save Save As Prepare Print Close

Notice Type Inn-Reach Paging Slips

Select Template

Location

☒ zymta

☐ All

Select Location

Sort By

5. Select "Local Printer" from the pop-up and click on "print."

Select Form Printer

Current Printer: Send to email address
Email Address: licalzj@mcls.org

Select Form Printer

(none)

Local Printer

FTS file save

Send to email address

Print Cancel

6. Once the list of slips appears, click on "Send Notices" button in middle of screen.

| # | Notice # | Patron Name | Title | Call # | Item Status |
|---|----------|----------------------|--------------------------|--------|-------------|
| 1 | 1 | Malone, Sam "Mayday" | iii zymta cheetah test | | MEL PAGED |
| 2 | 2 | Malone, Sam "Mayday" | iii zymta crow test | | MEL PAGED |
| 3 | 3 | Malone, Sam "Mayday" | iii zymta beaver test | | MEL PAGED |
| 4 | 4 | House, Gregory | iii zymta alligator test | | MEL PAGED |
| 5 | 5 | House, Gregory | iii zymta bison test | | MEL PAGED |
| 6 | 6 | House, Gregory | iii zymta buzzard test | | MEL PAGED |
| 7 | 7 | House, Gregory | iii zymta camel test | | MEL PAGED |

Send Notices to Print Move All to Print Queue

Fee Structure

Photocopies: Black & white \$0.15

Color Photocopies: \$1.00 (available at Wirt only)

Printer copies: Black & white \$0.15

Color Printer copies: \$0.50 (available at Wirt only)

Microfilm/fiche copies: \$0.25

Bcls Lost/Damaged materials: Books and BOCD's we get a discount on at purchase so we charge one half cost.

Full cost for any material that we pay full cost at purchase. Example is Playaway Wonder Books, Special Collections, Board games. IF library can replace a missing part in the item patron will be charged for only that piece. Materials from other library systems we charge off their invoice.

Collection Agency Fee \$10.00

Setting the Patron Preferred Pickup Location in Enterprise

1. Click **My Account** in the menu bar at the top of your screen.
2. Log in, if prompted.
3. Navigate to the **Personal Information** tab.
4. Open the **Preferences** section.
5. Select the "Preferred Pickup Library".

The screenshot shows the BCLS Enterprise user interface. At the top, there is a navigation bar with the BCLS logo and links for 'Welcome PATRON, BEST', 'Log Out', 'My Account', 'My Lists', 'Select Language', and a help icon. Below this is a search bar with a dropdown menu set to 'Everything' and a 'General Keyword' field. The main content area has tabs for 'Personal Information', 'Checkouts', 'Holds', 'Fines', and 'Additional Information'. The 'Personal Information' tab is active, showing a 'PATRON, BEST' profile with options to 'Change PIN' and 'Preferences'. The 'Preferences' section is expanded, showing settings for 'Default Language' (English), 'Default My Account Tab' (Personal Information), 'Default Checkouts View' (Library Checkouts), 'Default Holds View' (Library Holds), 'Preferred List' (no default list), and 'Preferred Pickup Library' (Bay Co/Auburn). A dropdown menu is open for 'Preferred Pickup Library', listing several options: 'Bay Co/Auburn', 'Bay Co/Alice and Jack Wirt', 'Bay Co/Wirt Pick-Up Window' (which is highlighted), 'Bay Co/Bookmobile', 'Bay Co/Pininning', 'Bay Co/Sage', and 'Bay Co/Garber Student Pick-up Only'. An 'Update' button is located at the bottom right of the preferences section. On the right side of the page, there are summary boxes for 'Checkouts', 'Holds', and 'Fines', each showing counts for 'Digital' and 'Library' items. The 'Fines' box shows a 'Total due' of '\$0.00'.

Computer and Phone Problem Contacts

Computer Problems

Horizon Down or frozen: Contact Walt, if not available, call VLC: 497-0925 opt 0

Please note: If only one computer is frozen, please turn it off and then reboot. If that doesn't work, put an out of order sign up. VLC does not need to be called if there is only one computer down unless it is critical to the operation of the branch. (leave note for Walt Peglow).

Horizon = VLC Internet = Spectrum

WIRT:

Public Computers or Wireless Internet Down: Contact Walt, call Spectrum to report it: 1-866-603-3199 opt 2

Staff Computers Internet Down: Contact Walt, call VLC: 497-0925 opt 0

SAGE:

Public Wireless Internet Down: Contact Walt, call Spectrum to report it: 1-866-603-3199 opt 2

Staff Computers and/or Public Internet Down: Contact Walt, Horizon Down call VLC: 497-0925 opt 0

AUBURN:

Public Wireless Internet Down: Contact Walt, call Spectrum to report it: 1-866-603-3199 opt 2

Staff Computers and/or Public Internet Down: Contact Walt, call VLC if Horizon down: 497-0925 opt 0

PINCONNING:

Public Wireless Internet Down: Contact Walt, call Spectrum to report it: 1-866-603-3199 opt 2

Staff Computers and/or Public Internet Down: Contact Walt, call VLC if Horizon down: 497-0925 opt 0

All other PC equipment/printer/software problems – Call Walt.

Phone Problems

Phone hardware problems: ex. – one phone not working, but the rest in branch are – Call Walt

Phone software problems: ex. – automated attendant not work – Call Walt

WIRT/SAGE/AUBURN:

Phone line problem: ex: no phone service at all - Call Walt. If Walt is not available, call Windstream (1-800-417-1619) to report the phone line is not working.

PINCONNING:

Phone line problem: ex: no phone service at all - Call Walt. If Walt is not available, call CenturyLink (1-800-954-1211) to report the phone line is not working.

No Power In Building

When there is no power in the building: Call Scott as soon as possible, then contact Walt and Kevin.

Walt's Phone #'s numbers:

894-2837 x 2303 – office
989-385-0369 – cell
989-895-6212 – home

Scott's Phone #'s

894-2837 x-2220 - office
989—225-4255 - cell

Kevin Ayala:

989-225-7290

VLC phone numbers:

989-497-0925 opt 0 (help desk)
989-996-5593 – cell (after hours)

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