MVLS Circulation, Processing & Patron Registration Best Practices & Standards

Library customer service is easier when there is consistency in how things are done in the member libraries. The working processes of library staff is also improved by consistency. This Best Practices and Standards document is intended to guide libraries in how to conform to the conventions used by most MVLS libraries. In some cases, and these will be identified, these "best practices" are also JA policies which all libraries must follow.

Libraries are encouraged to conform with all of these best practices.

Processing Best Practices

Barcode Placement Optimal barcode placement is the location that is easiest to scan with a minimum of manipulation. This is balanced with a perceived need to refrain from covering information that may be useful to the borrower.
- Optimal: Outside back cover, at the top
- Alternatives: Outside front cover, at the top
                              Inside back cover, at the top
                              Inside case/cover (for AV materials)
- Avoid: Never put a barcode in the center of an area or in a non-horizontal
                              position (difficult to scan)
- Remember: Barcodes are durable and cheap. We are not here to save
                               barcodes. We are here to serve users.

Ownership Information All materials that circulate should be clearly marked with ownership information that will be meaningful to people who are not familiar with your library
   Placement:
- Optimal: Stamp on top edge AND stamp or label on title page or
                              other external surface. For AV, stamp/label on exterior of
                              case/artwork AND library name or delivery code on each
                              part/piece inside.
- Alternatives: Stamp or label on any exterior surface
                              Stamp or label on title page
- Avoid: Placement only on an interior page
- Remember: Each individual part/piece - CDs etc. - should be labeled

   Information:
- Optimal: Full library name & address
- Alternatives: Full library name
                              Official 3 letter delivery code (for parts/pieces only - should never
      be
                              the only form of identification on books/AV cases.)
- Avoid: Any acronym other than the official library delivery code

- Remember: Your materials, and their disassembled individual pieces, will end up at libraries that have never heard of you.

Condition, Marks & Notes Other than ownership labels/stamps, barcodes, collection indicators and genre labels, library materials generally should not be marked in any permanent way. Use the Polaris item records to make notes on condition. Items that do not provide a good reading/listening/viewing experience should be withdrawn.
- Optimal: Put condition notes in Polaris physical condition field, with date and
                       library/initials
- Alternatives: Phone call or post-it note with date and library/initials for items belonging to others
- Avoid: Any marking, stamping or alteration of another library's item
                       Any tape or stickers on other library's items
- Remember: If is isn't yours, don't alter it in any way

Circulation Best Practices

Simple, unified circulation policies promote the best customer service. Distinctions that are obscure to patrons will be misunderstood and resented. Simple is best!

Loan Periods Polaris offers 10 distinct loan period options. That doesn't mean any library should have more than a total of 3-4 different loan periods. While you need to have data in all of the Polaris loan periods, it is best if a majority of items circulate for the same length of time. If you are using more than 3-4 loan periods you are confusing your patrons and can improve customer service by having fewer. These best practices don't stipulate specific loan periods for specific materials, but simply encourage uniformity.
   Standard Loan Period: Used for the majority of items the amount of time before the due date
- Optimal: 2, 3, or 4 weeks
- Alternatives: Many libraries prefer to have shorter loans on new/popular,
                       AV items, and special collections (like museum passes). Of course,
                       all electronic loan times are the same at all libraries. Patrons can select 1 or 2 weeks at this point for Overdrive.
- Avoid: More than 3-4 distinct loan periods
                       Any loan period that is not a multiple of 7 days
                       Any circulation related fees
- Remember: Circulating materials is the basic service most associated with libraries. Make it easy and rewarding for your users by reducing obscure distinctions & rules.

   Other Loan Periods: Use only where necessary

<u>Requests/Holds</u> The Polaris request system is important to encouraging active library use and quality customer service. Issues to keep in mind are:

- Process the send list early and often
- Encourage library users to use the request system both onsite and offsite through the PAC
- Avoid any charges for requests
- Make sure you have an effective system for letting users know requests are ready for pickup
- Requested items that the patron does not pick up should be returned to the loaning library in a timely manner
- Do not use the holds process for displays unless books are owned by your library

Resource Sharing Best Practices

Resource sharing is one the primary purposes of library systems. When library materials are shared customer service and library use are improved. Why should a book be on your shelf when it could be in the hands of a reader? Why should a book be on another library's shelf when one of your users wants to read it?

- Optimal: All items are shared
- Alternatives: Some libraries do not share new items MVLS libraries are encouraged to share as much as possible - even new material - within MVLS.
- Avoid: Restricting any item that you borrow from other libraries
- Remember: Sharing improves customer service and circulation for all libraries. Why have a book on your shelf when it could be in the hands of a reader?
Your users always have first access to your items through requests. You can always bring an item back by placing a request

Fines & Fees Best Practices & Policies

The purpose of library fines is to improve customer service. We are not trying to penalize rule breakers or to create an income stream. The purpose of fines is to facilitate responsible borrowing which improves customer service. On the other hand, replacement costs and damaged item fees are legitimate and in some cases required cost recovery mechanisms.

<u>Issues to consider</u>

- Fines: always keep customer service as the end goal. Keep fine structures simple and easy to understand
- Replacement costs and damaged item fees are treated by the OSC as uncollected revenue

- Be mindful of disasters - fires, floods etc.

MVLS/SALS JA Fines & Fees Policies All libraries must comply with these rules:
- Do not waive any fines or fees owed to another library
- All fine payments of more than $25.00 collected from a patron at one time should be forwarded to the originating library
- All replacement fees collected must be forwarded to the owning library
- All damaged material, collection agency, credit card and ILL fees must be forwarded to the originating library

Patron Registration Policies

All member libraries must comply with MVLS/SALS JA policies and procedures concerning patron registration in the Polaris database. These policies and procedures are on the JA Intranet under "JA Policies" and under "Polaris Support & Training / Polaris How To's" Highlights are below.
- Always check for duplicates before registering a new patron. Any individual can have only 1 record in the Polaris database
- Always complete records the same day they are entered
- In order to register, a user should present a photo ID and proof of residence (utility bill, etc.). These documents provide the basis for the Statistical Class Field
- All records must have an ID number - usually the Drivers License number. See the data entry rules. If a patron has no ID (Amish, transient) leave the ID field blank and enter a note with identifying info. See the JA data entry conventions.
- Address and identity should always be reviewed when renewing an expired card. Again, use a photo ID and proof of address.