

PLS CIRCULATION MANAGERS MEETING

AGENDA

Thursday, March 21, 2019

San Mateo Public Library, 55 W. 3rd Ave, San Mateo CA

The Laurel Room, 2:00-4:30 p.m.

Facilitator: Lori Lisowski/SMCCD

Recorder: Geralyn O'Brien/BPL

I. Agenda Review

II. Approval of Feb. 21, 2019 minutes [**Attachment 1**]

III. PLAN Items

1. PLS delivery report – Yemila/PLAN
2. PLAN report – Vanessa/PLAN
 - a. Auto renewal feature questions [**Attachment 2**]
 - b. Status of patron ID number/account number appearing on notices
 - c. Status of LRDT revisions and REGY and NRY scripts

IV. Action items

1. Approve new Menlo Park-Belle Haven location codes – Rani/MPL [**Attachment 3**]
2. Approve new South San Francisco-Grand Avenue location code – Brian/SSF [**Attachment 4**]
3. Delete unused SMCCD Patron types – Lori/SKY [**Attachment 5**]
4. Create, revise, approve auto renew courtesy notices in all formats (email, print, phone, text) as needed – Homer/RCL [**Attachment 6**]
5. Make recommendation to Admin Council on tote check-in – Lori/SKY

V. Informational Items

1. Brown Act requirements relating to agendas and public accommodation – Lori/SKY
2. Use of temporary cards for non-county patrons who do not have proof of address – Sarah/SBL

VI. Circulation Manual in FIDO Update/Review/Approve – Homer/RCL

1. 01.03 PLS Circulation Systems Managers Procedures (new section) [**Attachment 7**]
2. 03.04 PLS Patron Entry Protocols (minor changes) [**Attachment 8**]

VII. Agenda Building/Future Agenda Items

VII. Announcements

IX. Public comments:

(Individuals are allowed three minutes, groups in attendance five minutes. It is system policy to refer matters raised in this forum to staff for further investigation or action if appropriate. The Brown Act prohibits the Circulation Managers from discussing or acting on any matter not on the agenda pursuant to state law.)

Pending deadline dates and forthcoming events:

Admin Council next meeting: April 4, 2019

Admin Council Executive Committee next meeting: May 2, 2019

Circulation Managers' next meeting: April 18, 2019

Next Recorder: DCL

Recorder rotation:

SSF: February 2019

BPL: March 2019

DCL: April 2019

MPL: May 2019

RCL: June 2019

SBL: July 2019

SMCL: August 2019

SMP: September 2019

SSF: October 2019

BPL: November 2019

DCL: December 2019

MPL: January 2020

RCL: February 2020

Attachment 1: February Minutes

**PLS CIRCULATION MANAGERS MEETING
MINUTES**

Thursday, February 21, 2019

San Mateo Public Library, 55 W. 3rd Ave, San Mateo CA
The Laurel Room, 2:00-4:30 p.m.

Present: Lori Lisowski/SKY, Homer Martinez/RCL, Natalie Juhl/DCL, Sonia Delgado/MPL, Raquel Metcalfe/SBL, Ray Delara/BPL, Shawnte Santos/SSF, Brian Malibiran/SSF, Jon Jung/SMPL, Mara Cota/SMCL, Yemila Alvarez/PLAN, Monica Schultz/PLAN, Sandy Kirkpatrick/PLAN, Nick Dellaporta/CSM

Facilitator: Lori Lisowski/SMCCD

Recorder: Shawnte Santos/SSF

- I. Agenda Review – Add to PLAN report: Sierra upgrade and auto renew.
- II. Approval of Jan. 17, 2019 minutes – spell out BRSSD (Belmont Redwood Shores School District). Action Item 2 should read “automate expiration on patron templates.” Add #6 under Circulation Manual Review to email Homer with any Circulation Manual changes. MSP SMCL/RCL

III. PLAN Items

1. PLS delivery report

- a. Consideration of weekend delivery and tote check-in – Yemila/PLAN

Saturday delivery: Libraries opting out of Saturday delivery would not see any increase in cost; cost increases will be distributed among all participating libraries. Potential for a special schedule with only libraries that opt in.

Tote check in: Once bins are scanned in, items should be shelved/hit the floor immediately (potential change in workflow). No new hardware needed. Bins are different- smaller and lidded. Potential space/storage issues because of bin quantity. Bins nest fully, better than current bins. Sacramento and Alameda County currently use these bins. Once a bin is scanned in, any hold slips would be generated automatically and must be matched with their items in the bin. There is an option to manually check in each book as usual.

2. PLAN report – Monica/PLAN

Bug fixes/features for new ILS has been sent out. Sierra upgrade to happen on Feb 26. No issues predicted. Auto renewal is included with update, but implementation will be delayed until all circulation questions are addressed. Auto renewal opt out is not an option with the upgrade. (For the future, an opt out option is preferred.) More clarification is needed on when items are renewed and what notices are sent and when. Courtesy notices need to be updated and translated. Lori will compile everyone’s questions related to the new auto renewal feature and send to Vanessa and responses will be discussed at the March meeting. Send questions by **Feb. 28** with a copy to the other circulation managers.

Attachment 1: February Minutes

Monica's last day is March 6. Send any ILS questions to Vanessa; anything else should be directed to the Helpdesk or Carol Frost. In April the firewall is going to be changed.

IV. Action items

1. Deletion of non-applicable SMCCD P-types – Lori/SKY
 - a. CREGA -- MSP RCL/SBL
 - b. CREGY -- MSP RCL/SBL

V. Informational Items

1. Admin Council meeting report – Lori/SKY

Marketing group got praise and continued funding. Census 2020 work beginning. Summer reading will be a 5 week program. No PLS rebrand. Day in the District visits in March and April. Community Colleges are going with new statewide library services platform beginning in 2020. Working group formed to plan transition. Colleges are not leaving PLS, just a different relationship.

2. Brown Act posting requirements – Lori/SKY

As a result of new requirements, agendas and attachments are being posted to the PLS web site. Lori will do further research on what needs to be included and develop a rough draft procedure for the Circulation Manual.

3. Each library should check their Saved Searches in Sierra (Create Lists>Saved Searches) and delete what is no longer needed. Think about guidelines for how long to save searches.

VI. Circulation Manual in FIDO Update/Review/Approve – Homer/RCL

1. 01.01 PLS Circulation System Managers Decisions (completely revised)
Approve with changes MSP SMCL/DCL
2. 01.02 PLS Circulation Systems Managers Meetings (several revisions)
Approve with changes MSP SMCL/SBL
3. 01.05 PLS Interlibrary Delivery System (minor changes and new delivery routes)
Approve with changes MSP SMCL/DCL
4. 01.05.01 PLS Special Delivery Shipping Guidelines (new section) MSP SMCL/SSF
5. 07.06 Other Reports From Web Management (new section) MSP SSF/SBL
6. 07.07 Abbreviated Circulation Statistics (new section) MSP SMCL/SBL
7. 09.01 Fines Paid (new section) approve with changes MSP SSF/SMCL
8. 06.01 Reports Calendar to move to section 1 of Circulation Manual

VII. Agenda Building/Future Agenda Items

1. Follow-up on REGY and NRY scripts and LRDT revisions
2. Update auto renewal courtesy pre-overdue notice text and translate
3. Brown Act posting requirements
4. Phone tree: do we want to continue using it? Everyone check/update their sections
5. Update from Vanessa on status of patron ID number/account number appearing on all notices

Attachment 1: February Minutes

VII. Announcements

MPL – Hiring up to 10 pages. Pays \$13.10/hr

SMCL – Recruitments open: branch manager for Atherton/Brisbane

BPL – Book to Action grant program: *March* by John Lewis. (Same book as One County One Book)

SSF – Received grant for Life Skills/Adulting programs

RCL – Hiring multiple positions. See exhibit in the news.

IX. Public comments:

None.

Pending deadline dates and forthcoming events:

Admin Council report:

Admin Council next meeting: April 4, 2019

Circulation Managers' next meeting: March 21, 2019

Next Recorder: BPL

Recorder rotation:

SSF: February 2019

BPL: March 2019

DCL: April 2019

MPL: May 2019

RCL: June 2019

SBL: July 2019

SMCL: August 2019

SMP: September 2019

SSF: October 2019

BPL: November 2019

DCL: December 2019

MPL: January 2020

RCL: February 2020

Attachment 2: Auto renewal feature questions

Rev. Mar. 5, 2019

To: Vanessa Walden/PLAN
From: Circulation Managers Committee

Re: Questions about the new Auto Renew feature in Sierra for discussion at the March meeting

When will the new feature be turned on? **June 11, 2019 (tentative)**

On what day in the cycle will items be renewed? **Not sure I understand the question – which cycle are you referring to? Automatic renewal occurs during the daily running and clearing of the courtesy notices.**

Will the new due date be calculated using the existing due date?

For example, if a 3-week item renews 2 days before the due date, will the new due date be in 23 days? **Renewed due dates will be calculated on the previous due date. For example, a 3-week item due on 3/7 will renew with a new due date of 3/28. Patrons will not lose any days of their checkout. Checkout periods in any increment of one week will be due on the same day of the week. For example, a 3-week item checked out on a Monday will be due on a Monday, three weeks later.**

Will there be an increase in the number of notices patrons receive? **No. Renewal notices will be included in the courtesy notice.**

How do the auto renewal notice and courtesy overdue notices interact? Are they two separate notices? **They are the same notice.**

If the auto-renew happens two days ahead of time, will the auto renew notice take the place of the courtesy overdue notice? **If an item appears on the courtesy notice and is eligible for renewal, it will be automatically renewed. For example: A patron has a 3-week checkout with a due date of 3/7. At the time the notice is run on 3/5 the item will be renewed automatically with a new due date of 3/28. The notice they receive on 3/5 will include the item with the new due date.**

The courtesy notice is #8. Can we change the notice name without changing the loan rules? (Notice #8 is listed in all rules.). **Notice name does not need to change. We will need to alter the text and translations. Here is one option for discussion & decision (changes are highlighted):**

Subject: Courtesy Pre-Overdue Notice from your library. The item(s) listed below are due back soon **or have been renewed. This courtesy notice does not list everything currently on your record, just those items that are due in the next few days or **have a new due date.** For questions, please call your local library. **To view everything on your record** or pay your library fines and fees online, visit <http://catalog.plsinfo.org>, select your local library and log in with your username or barcode and PIN.**

What is the text notice limit, if any? **15 lines; 76 characters (including spaces) per line**

Currently, courtesy notices are for email only. Do we need scripts for phone calls once we move to the new phone system? **Yes. We should set up the call flow messages up at the implementation phase for (happening right now) so we won't have to make changes later.**

Attachment 2: Auto renewal feature questions

What about Shoutbomb? Renewal notices go out to patrons 2 days before renewal. The current text is “Some item(s) due for renewal [date]. Renew all items with the keyword RA or RL to choose from a list.” The auto-renew function in Sierra will renew the items 2 days before they are due when the courtesy notices are run so patrons will receive fewer notices via Shoutbomb.

What kind of communications will be sent to patrons (and staff) about the auto renewal feature before it is turned on? An FAQ document of how the feature functions and differences from the scripted auto-renew will be sent to the Circulation Managers.

Who is responsible for writing/sending them? The document will be drafted by the ILS Administrator and emailed to the PLS Circulation Managers group prior to the May meeting. Changes and additions to the document will be decided upon at the May meeting. The document will be updated by the ILS Administrator and emailed to the Circulation Managers no less than 3 business days after the May meeting. Circulation Managers will be responsible for distributing and disseminating information to staff and patrons.

What are the options if a patron wants to opt out? Patrons cannot individually opt out. The feature is governed by the loan rule. “Opt out” patrons require a separate PTYPE & loan rule. Eligible checkouts will not be renewed if:

- Automatic renewals are disabled in the loan rule
- Patron self-renewal is blocked (e.g. outstanding holds, patron blocks)
- All hourly checkouts

02.07.02 New Code Request Form for 4bjbe

FORM

Request Date: 3/6/19 Requesting Library: Menlo Park Belle Haven

Requestor's email: quinonez@plsinfo.org

A. Location Code

C. Item Type

B. Patron Type

D. Loan Rule

E. Patron Code 2

Proposed New Code: 4bjbe Menlo Park - Belle Haven Children's Beginning Readers

Give detailed answers to the questions for the proposed new code:

A. Location codes: To what library and collection does this item belong?

Menlo Park – Belle Haven Children's Beginning Readers

Is this a new location code?

Yes it is

Why is it different from the location codes your library already uses?

Menlo Park – Belle Haven does not currently have a location code designated for Beginning Readers level

D. Loan rules: Loan rules define the loan period, renewals, fines, holds, processing fee and notice cycle. Is this a new loan rule?

No, not new

What is the loan period, number of renewals and fine level?

This should match Menlo Park Main items with equivalent location code

What is the notice and billing cycle?

This should match Menlo Park Main items with equivalent location code

02.07.02 New Code Request Form for 4bygr

FORM

Request Date: 3/6/19 Requesting Library: Menlo Park Belle Haven

Requestor's email: quinonez@plsinfo.org

- A. Location Code C. Item Type
- B. Patron Type D. Loan Rule
- E. Patron Code 2

Proposed New Code: 4bygr Menlo Park-Belle Haven Young Adult Graphic Novels

Give detailed answers to the questions for the proposed new code:

- A. Location codes: To what library and collection does this item belong?

Menlo Park – Belle Haven Young Adult Graphic Novels

Is this a new location code?

Yes it is

Why is it different from the location codes your library already uses?

Menlo Park – Belle Haven does not currently have a location code designated for Young Adult Graphic Novels

- D. Loan rules: Loan rules define the loan period, renewals, fines, holds, processing fee and notice cycle. Is this a new loan rule?

No, not new

What is the loan period, number of renewals and fine level?

This should match Menlo Park Main items with equivalent location code

What is the notice and billing cycle?

This should match Menlo Park Main items with equivalent location code

02.07.02 New Code Request Form for 8ga8q

FORM

Request Date: 3/25/2019 Requesting Library: SSF – Grand Avenue

Requestor's email: malibiranb@plsinfo.org

- A. Location Code C. Item Type
- B. Patron Type D. Loan Rule
- E. Patron Code 2

Proposed New Code: 8ga8q

Give detailed answers to the questions for the proposed new code:

- A. Location codes: To what library and collection does this item belong? Is this a new location code? Why is it different from the location codes your library already uses? If the proposal uses an existing location code, show how p-types and i-types are affected in the equation that is the LRDT. See section III for formatting. (Note: As of the 9/17/15 meeting, Link+ location codes are exempt from PLS Circulation Managers approval.)

This belongs to the Grand Avenue Library, and the collection would be new materials: Adult Fiction, Adult Non-Fiction, Adult DVD's, Adult Blu rays, Children's Picture books, Children's Fiction books, Children's Graphic novels.

It is different from the location codes that the library is using because the other location codes will send out these new items for holds. We want our patrons to have a chance to check out these items.

Attachment 5: Delete unused SMCCD patron types

02.07.01 Patron Type & Loan Rule Correction Form for CONLA

FORM

Request Date: 03/12/19 Requesting Library: SKY

Requestor's email: lisowskil@smccd.edu

P-type: CONLA Element to be changed: Delete P-type CONLA

Additional information:

SMCCD is proposing to delete the P-type CONLA because its use has been superseded by CREM. CREM is used for all online college cards.

The P-type is not used. Deleting it will prevent anyone from inadvertently using it.

This change will have no impact on any other jurisdiction and will not affect any loan rules, location codes, I-types, or other P-types.

02.07.01 Patron Type & Loan Rule Correction Form for CGSP

FORM

Request Date: 03/12/19 Requesting Library: SKY

Requestor's email: lisowskil@smccd.edu

P-type: CGSP Element to be changed: Delete P-type CGSP

Additional information:

SMCCD is proposing to delete the P-type CGSP because it is not used. Deleting it will prevent anyone from inadvertently using it.

This change will have no impact on any other jurisdiction and will not affect any loan rules, location codes, I-types, or other P-types.

Attachment 5: Delete unused SMCCD patron types

02.07.01 Patron Type & Loan Rule Correction Form for CNCOL

FORM

Request Date: 03/12/19 Requesting Library: SKY

Requestor's email: lisowskil@smccd.edu

P-type: CNCOL Element to be changed: Delete P-type CNCOL

Additional information:

SMCCD is proposing to delete the P-type CNCOL because it is not used and not needed. Deleting it will prevent anyone from inadvertently using it.

This change will have no impact on any other jurisdiction and will not affect any loan rules, location codes, I-types, or other P-types.

Attachment 6: Courtesy Notices

Current Auto Renew Notice:

Library Materials Renewal Status

The Peninsula Library System will automatically renew eligible items belonging to libraries in San Mateo County one day before the due date. Items with holds/reserves or that have reached the maximum renewal limit will not renew. The library account must be current and have a balance of \$15 or less.

If you believe an item should have renewed, contact your local library right away in order to avoid late charges.

If you would like to opt out, please contact your local library.

Let us know what you think of the new feature by clicking on the link below:

<https://www.surveymonkey.com/r/VTV7D3H>

You can always access your account information at <http://catalog.plsinfo.org>

Courtesy Renewal Notice Draft: (15 line limit with 76 characters per line)

Subject: Courtesy Renewal Notice

The item(s) listed below are due back soon. This courtesy notice does not list everything currently on your record, just those item(s) that are due in the next few days. The Peninsula Library System will automatically renew eligible items belonging to libraries in San Mateo County two days before the due date. Items with holds/reserves or that have reached the maximum renewal limit will not renew. The library account must be current and have a balance of \$15 or less.

Not all items will renew and are due soon. If you believe an item should have renewed, contact your local library right away in order to avoid late overdue charges.

You can always access your account information at <http://catalog.plsinfo.org>

~~If you would like to opt out, please contact your local library.~~

~~Let us know what you think of the new feature by clicking on the link below:~~

~~<https://www.surveymonkey.com/r/VTV7D3H>~~

Current Notices:

First Overdue Notice:

Library records show the following item(s) overdue. If you have returned them, please contact your local library. Otherwise, please return them as soon as possible to avoid increasing fines. To renew your items or pay your library fines and fees online, please visit catalog.plsinfo.org, select your local library and click on "My Local Library".

Second Overdue Notice:

**** Library Second Notice ***

The following items are now very late and fines are being assessed. Please contact your library as soon as possible to resolve this issue and avoid further fines and notices.

To renew your items or pay your library fines and fees online, visit catalog.plsinfo.org, select your local library and click on "My Local Library".

Courtesy Notice (notice 8):

Subject: Courtesy Pre-Overdue Notice from your library. The item(s) listed below are due back soon. This courtesy notice does not list everything currently on your record, just those items that are due in the next few days. For questions, please call your local library. To renew your items or pay your library fines and fees online, visit <http://catalog.plsinfo.org>, select your local library and log in with your username or barcode and PIN.

Auto Renew Notice:

Library Materials Renewal Status

The Peninsula Library System will automatically renew eligible items belonging to libraries in San Mateo County one day before the due date. Items with holds/reserves or that have reached the maximum renewal limit will not renew. The library account must be current and have a balance of \$15 or less.

If you believe an item should have renewed, contact your local library right away in order to avoid late charges.

If you would like to opt out, please contact your local library.

Let us know what you think of the new feature by clicking on the link below:

<https://www.surveymonkey.com/r/VTV7D3H>

You can always access your account information at <http://catalog.plsinfo.org>

01.03 PLS Circulation Systems Managers Procedures (rev. 3/14/19) DRAFT

FIDO and ILS Privileges

Only members of the PLS Circulation System Managers Committee are given editing privileges to the Circulation Manual and access to the Financial Debt Folder. (Note: PLS Administrative Council members also have access for the Debt folder). Most revisions, additions and deletions to the Circulation Manual and Debt Folder must first be approved at a PLS Circulation System Managers Committee meeting. The following sections do not need committee approval and should be updated as needed: 01.01.01 PLS Circulation and Overdue Contacts, 01.01.02 PLS Circulation System Managers, 02.04 PLS Table of Loan Periods and Fees and 02.05.01 PLS AV Snag Contact List.

On the ILS, only PLS Circulation System Managers are given access to the Days Closed and Hours Open tables. All other logins should not have this privilege even if the staff member has been given a high-level login. For more details, see section 01.06 PLS Library Hours and Holidays. In addition, access to marking each other items as missing is given using a special login.

Whenever there is a new member to the committee, or if a member retires or leaves the committee, access changes are initiated by the committee Chair (???)

At the jurisdiction level, the Circulation Manager is usually the direct contact with Unique Management Services (UMS) and is assigned administrative access as well. In addition, he/she will need access to ILS Tools and Library Tools to order AMH supplies and library patron cards and to change library hours (including holiday closure dates) on the PLS site. Who opens the ticket(???)

Barcode Label and Patron Card Orders

Libraries are responsible for ordering their own library cards and item barcodes. PLAN has created a Library Tools section when logging in to the PLS Help Desk. There is a list of vendors and instructions for ordering library cards and item barcodes. For access to Library Tools or other questions, PLS Circulation Managers will contact PLAN staff.

Attachment 7: Circulation Systems Managers Procedures

Barcode Label Agency Prefixes

Barcodes beginning with a **2** are patron barcodes; barcodes beginning with a **3** are item barcodes. Each agency is identified by a different prefix in the barcode, which follows the initial patron or item designation. Agency prefixes are:

9041	San Mateo County
9042	Burlingame
9043	Daly City
9044	Menlo Park
9045	Redwood City
9046	San Bruno
9047	San Mateo City
9048	South San Francisco
9366	Canada College
9367	College of San Mateo
9368	Skyline College

03.04 PLS Patron Entry Protocols (rev. 3/13/19) DRAFT page 2

In the ILS, patrons are registered using templates of home libraries. Upon determining the patron's residence, it is important to select the corresponding template from the new patron templates pull down menu. The system will prompt for most of the entries. The templates have the appropriate PTYPE, P4 code, expiration date and library codes already entered.

Currently, the expiration date on patron templates are updating daily using a script written by PLAN staff. Most templates expire in three years. Templates with the patron type ONLA expire in 30 days and TEMP in 3 months. If a new template is created, contact PLAN staff so that it is added to one of the renewal scripts. For more detailed information on patron types, see section 02.072 New Code Request Form, Table 2 – P-Types.

If Circulation Managers need to update the expiration dates manually on an individual template, the SCIRC password is needed. To update expiration date:

1. Pull down the Admin menu; select settings.
2. Click on the templates tab.
3. For record type, select Patron.
4. The left hand box will have all the templates used at your library. The right hand box will have all the templates.
5. Double click the template to be changed.
6. Change the date in the expiration box appropriately.
7. Click the "save" icon at the top of the page. That's it.

The agreed protocols for registering patrons follow.

[PLS Patron Data Entry Protocol](#)

Library cards issued by any PLS library are valid at all PLS libraries.

Important to enter all information correctly to avoid Print Wizard Snags

(n) PATRON NAME: Enter in ALL CAPS. LAST NAME (comma) (space) FIRST NAME (space) MIDDLE INITIAL (space) TITLE

JONES, JUNIE B. or JOHNSON, JAMES A. III or Johnson, James JR.

(Comma is important for Print Wizard Software to print Holds correctly. Do not use a second comma, as it will mess up Print Wizard)

Hyphens are OK as they show up in patron record but do not show up or affect index.

If patron goes by two names, adding another N Field is OK. For example:

n JONES, JUNIE B
n SMITH JONES, JUNIE B

(g) GUARDIAN: Add guardian if the patron is under 18 years old.

FIRST LAST **SUSIE JONES**

Auto Renewal – If a patron wants to opt out of the auto-renewal script, the field is changed to NO.

Patron Code (P2): Enter for Donor, Friend, Outreach, Senior or Volunteer with p-type GSP. Student Initiative or Big Lift are used with p-type REGJ and if the child is part of either project.

CENSUS: SSF only

PATRON TYPE: #REGA, #REGJ, #REGY #NRA, #NRJ, #NRY #TEMP, #STF, #GSP (For staff and volunteers who work here and live elsewhere, give them #STF or #GSP so they get “your” privileges and use Direct Loan code for home residence.) REGJ and NRJ are used through age 17 and REGY and NRY for ages 18-19. (Approved by PLS Administrative Council on 4/5/18)

BIRTHDATE: Enter MM-DD-YYYY (required for all juvenile and young adult patrons). Effective September 2018, the birthdate will be required to use Discover & Go. If an adult patron does not want to provide his/her birthdate, the default birthdate can be used: 01-01-1901.

Attachment 8: Patron Data Entry Protocols

HOME LIBRARY: Issue library card that corresponds to where the patron lives. The home library is where the patron resides. If the patron lives outside of San Mateo County, the home library is the library issuing the card.

(a) ADDRESS: Address to send mail to. Usually this will be the residential address. If not, this is the address to which mail is sent and residence address would go in the ADDRESS 2 field. Per the U.S. Post Office Service protocols, do not use punctuation marks in any address field. (For example, no periods or commas. Hash tags [#] are OK to use)

PO BOX 123 *not* **P.O. BOX 123** or **Apt F1** *not* **APT. F-1**

(h) ADDRESS 2: Use this for residential address, if different from mailing address. Per the U.S. Post Office Service protocols, do not use punctuation marks in any address field. (For example, no periods or commas. Hash tags [#] are OK to use)

ZIP CODE: 5 digit number

(t) TELEPHONE: This number is called if Notice Preference is set to PHONE or if there is no email address in the patron record and Notice Preference is set to NONE. Enter in the format: **650-555-1234**. Last four digits of the phone number are printed on hold slips.

(p) TELEPHONE 2: Additional phone number is optional. Format: **650-555-1234**

(u) DRIVER'S LICENSE: Valid California DL or ID only. First letter must be capitalized.

A9894567 *not* **a9894567**

(k) OTHER ID: Enter the ID number only from other forms of accepted picture identification such as passport numbers, consulate ID, out-of-state driver license, etc. Do not add any explanation before or after the ID number. This is a searchable index field similar to field U.

B123478925 *not* **Passport # B123478925**
E123456789 *not* **E123456789 mx consulate ID**

(m) MESSAGE: Messages will pop up when entered in a patron's record. Messages can be deleted once the issue has been resolved. Always enter date (YR MO DY), text of message, your initials, library location For example:

2015 MAY 28 - (text) ...RM/6s OR 2015 5 28 – (text)...RM/6S

Attachment 8: Patron Data Entry Protocols

(x) NOTE: When placing notes in a patron's record always enter date, your initials and library location. Always enter date (YR MO DY), text of note, your initials, library location
For example:

2015 MAY 28 - (text) ...RM/6s OR 2015 5 28 - (text)...RM/6S

(b) BARCODE: Only one barcode per patron. Replace old barcode with new one in the ILS and in Envisionware. Always important to change in Envisionware in case a patron has printing funds in their Envisionware account. Merge old and new barcodes on Overdrive.

(z) EMAIL: Enter email address in lower case. A patron may have up to three emails in the account. Enter all emails in the email field (z field). Email addresses need to be separated with a comma without spaces. For example:

smith@hotmail.com,smithfamily@gmail.com,jsmith@yahoo.com

(=) PIN: Automatically set PIN as the last four digits of the patron's phone number. If the patron would like the PIN to be different we can enter it for them or patron can go online and change their PIN. **PIN MUST BE ALL NUMBERS.**

(i) INPUT BY: Your initials and library location. For example: RM/6s. (Very important for stats as is the only way to find out how many cards were created at your branch)

DIRECT LOAN (P4): Select the library representing the place where the patron lives including if in PLS. For example: MPL for Menlo Park resident or SUN for a Sunnyvale resident. OAK for an Oakland Resident. Santa Clara County for a Los Altos resident. The P4 code is used for the "Borrowed From" and "Loaned To" stats for the state report. Do not use boxes 0, 11 or 29 as these are "none" or blank (---).

NOTICE PREFERENCE: Only change this field to **MAIL** if a patron wants to receive a printed notice instead of a telephone call or email. (See section 04.01 Patron Notices for a detailed explanation on how this field works) Patrons are notified by ONE method only.

PREFERRED LANGUAGE: Choose if patron prefers to receive email notification in Spanish or Chinese. Phone and Post Mail notification are only in English.

Important to enter all information correctly to avoid Print Wizard Snags