

# **MONTANA SHARED CATALOG 4RIVERS PARTNER LIBRARIES**

## **STANDARD OPERATING PROCEDURES**

Participating libraries

Boulder Community Library  
Clancy Community Library  
Dillon Public Library  
*Lima School District #12 Library*  
Madison Valley Public Library (Ennis)  
Sheridan Public Library  
Thompson-Hickman Library (Virginia City)  
Three Forks Community Library  
Twin Bridges Public Library  
Whitehall Community Library  
Whitehall School Libraries

**DRAFT** 1/31/09

UPDATE 6/15/10

## **Checkout periods**

Checkout periods will follow the circulation rules and procedures of each partner library and fined as determined by the partner library.

## **Holds**

- Patrons are allowed to place as many holds as they please.
- Patrons are notified of available holds within 24 hours, via phone, email or mail.
- Staff must check the Onshelf Items with Holds report daily and take appropriate action.
  - i. If an item is not on the shelf:
    - Search for a maximum of two days.
    - To force the hold to another partner libraries copy, check the item out to trace, change home location to lost, or follow other library procedure accomplishing the same end.
    - If your library has the only copy and the hold is for your library's patron, remove the hold and notify the patron.
    - If the patron belongs to another library, put the item into transit to that library and add to the respective courier's deliveries .
  - ii. If a patron presents an item for checkout that has an onshelf hold, proceed with checkout by using the hold override. The hold patron will remain first in the hold queue.
  - iii. Packing requirements:
    - When containers include materials for more than one library, items must be banded together and clearly marked according to their destination library.
    - All containers must be secured (so books cannot fall out) and clearly labeled with destination library.
- Staff must check the Expire Holds and Clean Holds Shelf report.
- An Expire Inactive Holds report runs monthly for each library. This report cancels/expires holds that have been inactive or unfilled for six months.
- Patrons have a reasonable amount of time to pick up their holds, after which the book will be sent back to the owning library.
- Whether or not holds can be picked up for a patron by a spouse, child, or other representative is at the discretion of the partner library.
- Patrons may elect to pick up their holds at any partner Library. Staff will not change pick up location of holds unless asked to do so by patron. If the pickup location of an available hold is changed, contact the library where the item is currently being held so it can be rerouted accordingly.
- Items may be returned to any Partner Library, regardless of where they were checked out.

## **Receiving Partner items**

- Use the Discharge (checkin) wizard.
- If item is scanned and the option "Release Item" appears, choose "Do Not Release Item". This means the item needs to continue its journey to another library.
- If item's "Route/Transit to" location is FLOAT-RET, discharge item again.

### **Missing AV items**

- If a patron returns an item that is missing one of its pieces, call the patron and ask that they return the missing piece (tape, CD, etc.) ASAP.
- Patron has one month to return the missing item. At that time he/she will be billed for the missing part or the entire set, whichever the owning library requires.
- If the patron belongs to another library, ask that library to contact the patron and follow through in retrieving missing materials (only the patron library can modify the patron account to add extended info notes about having called patron, etc.).
- Keep incomplete items where they were returned until the issue is resolved.

### **Maintaining patron records**

- Database entry guidelines must be adhered to by all libraries. Follow the MSC Patron Registration Guidelines [located on the MSC website at http://msl.state.mt.us/For Librarians/Montana Shared Catalog/Circulation/PatronRegistration.doc](http://msl.state.mt.us/For_Librarians/Montana_Shared_Catalog/Circulation/PatronRegistration.doc)
- Maintenance of patron records must be done at the home library.

### **Checkout limits/circulation rules/billing structure**

- Checkout periods will follow the circulation rules and procedures of each partner library, and patrons will be fined as determined by their home library.
- If a patron wants to check out items at another partner library and their account is blocked, staff can place holds on the items, choosing the patron's home library as the pickup location. The partner library can then trap the holds and send the items to the patron's home library for pick up.
- Because each partner's library card will work at any of the partner libraries, each patron may only have one card.
- Patrons may return partner items at any partner Library.

### **Overdue items/damaged, lost & long overdue items**

- If an item belonging to another library is returned damaged or in need of repair, return the item to its home library with an explanation of damage or loss attached to that item. Notify the owning library of the loss/ damages so that an arrangement can be made for the patron to pay fines/fees or replace the item.
- If a patron claims to have lost an item belonging to another library follow these steps:
  - i) Mark item lost using default item price.\*
  - ii) Contact the owning library to notify them item is marked lost.
  - iii) Collect money from patron and clear their account.  
(\*The lending library can also mark the item lost)
- If a lost item from another library is returned, refunds are not available.

### **User Claims Returned process**

- Always check the shelves before sending an item to User Claims Returned.
- When using the User Claims Returned wizard, the system asks for a date that the item was supposedly returned. Use the actual due date to prevent fines from being assessed and overdue notices from being generated.
- User Claims Returned will be looked for at least twice a month for a period of three months.

- If the item has not been found within three months, contact the owning library and mark it as lost using the Mark Item Lost wizard. Waive the charges. Partner Libraries agree that it is not necessary to remit payment for User Claims Returned to lost charges.

**Adding items to the system**

- New items may be added to the system 6 months before their publication date.

## Current MSC 4Rivers Partner Libraries and contact information:

MSC Code	Library	Bar Codes	Contact Info	Email/ Website
BOULDER	<b>Boulder Community Library</b> PO Box 589/ 202 S. Main, Boulder MT 59632	39515 29515	Jodi Smiley (406)225-3241 fax same	<a href="mailto:jsmiley@mtlib.org">jsmiley@mtlib.org</a> <a href="http://jeffersoncountylibrarysystem.org">http://jeffersoncountylibrarysystem.org</a>
CLANCY	<b>Clancy Community Library</b> PO Box 169/ 6 N. Main, Clancy, MT 59634	36540 29540	Carly Delisgne (406)933-5254 fax same	<a href="mailto:clancylibrary@bresnan.net">clancylibrary@bresnan.net</a> <a href="http://clancylibrary.googlepages.com">http://clancylibrary.googlepages.com</a>
DILLON	<b>Dillon Public Library</b> 121 S. Idaho Street, Dillon, MT 59725	39512 29512	Marie Habener (406)683-4544 fx:(406)683-2504	<a href="mailto:mhabener@bresnan.net">mhabener@bresnan.net</a> <a href="http://www.mtdl.lib.org">http://www.mtdl.lib.org</a>
LIMA	<b>Lima School District #12</b> PO Box 186/ 1 N Harrison, Lima, MT 59739	39876 29876	Kathleen Martinell (406) 276-3571	<a href="mailto:kathleen@3rivers.net">kathleen@3rivers.net</a>
MADISON	<b>Madison valley Public Library (Ennis)</b> PO Box 178/ 210 E. Main, Ennis, MT 59729	39539 29539	Kathy Knack (406)682-7244 fx:(406)682-7669	<a href="mailto:ennislib@3rivers.net">ennislib@3rivers.net</a> <a href="http://www.3rivers.net/~ennislib">http://www.3rivers.net/~ennislib</a>
SHERIDAN	<b>Sheridan Public Library</b> PO Box 107/ 109 E. Hamilton, Sheridan, MT 59729	39867 29867	Bill Talbot (406)842-5770 fax same	<a href="mailto:shrpilib@3rivers.net">shrpilib@3rivers.net</a> <a href="http://sheridanlibrary.googlepages.com">http://sheridanlibrary.googlepages.com</a>
THOMHICK	<b>Thompson-Hickman Library (Virginia City)</b> PO Box 128/ 217 Idaho, Virginia City, MT 59755	39550 29550	Joanne Erdall (406)843-5347 fx:(406)843-5347	<a href="mailto:vclibrv@3rivers.net">vclibrv@3rivers.net</a> <a href="http://madison.mt.gov">http://madison.mt.gov</a>
THREEFKS	<b>Three Forks Community Library</b> PO Box 1350/ 607 N. Main, Three Forks, MT 59752	33773 23773	Debbi Kramer (406)285-3747	<a href="mailto:tfllibrary@hotmail.com">tfllibrary@hotmail.com</a>
TWIN	<b>Twin Bridges Public Library</b> PO Box 246/ 206 S. Main, Twin Bridges, MT 59754	39542 29542	Betty Humbert (406)684-5416 fx:(406)684-5260	<a href="mailto:twin@3rivers.net">twin@3rivers.net</a>
WHITEHALL	<b>Whitehall Community Library</b> PO Box 659/ 110 First St. W., Whitehall, MT 59759	39516 29516	Donna Worth (406)287-3763	<a href="mailto:dworth@mtlib.org">dworth@mtlib.org</a> <a href="http://whitehall.library.googlepages.com">http://whitehall.library.googlepages.com</a>
WHITEHS	<b>Whitehall Public Schools Library</b> PO Box 1109/1 W Yellowstone Whitehall, MT 59759	39529 29529	Holly Harper or Linda Blomquist (406)287-3862	<a href="mailto:hharper@whitehallmt.org">hharper@whitehallmt.org</a> <a href="mailto:lblom@whitehallmt.org">lblom@whitehallmt.org</a>