

Sage Library System Circulation Policies 2023

The purpose of standardizing Sage Library System circulation policies is to reasonably ensure that residents receive consistent access to the Sage Library System. Some library jurisdictions may have additional local policies. This document combines policies and procedures as a single resource and is intended primarily for library staffs, though it will be made publicly accessible.

Library card eligibility and registration

Residents of any public library jurisdiction within the Sage Library System are deemed eligible to receive a library card from their home library, subject to resolving any previous restrictions. Completion of a **library card application** and presentation of **acceptable ID and proof of residence or property ownership** in one's home library jurisdiction will be required. Borrowers may only have one Sage System public library card for personal use. Students enrolled in schools, including regional colleges and universities, may have school library accounts in addition to a public library account.

Nonresidents and temporary residents may be required to pay a fee to receive a library card including Limited or Special Use cards at the discretion of each library jurisdiction. Lost or damaged cards may be charged a fee and should be referred to home library for replacement.

Borrowing policy for accounts for minors under the age of 18 will be set by local libraries. Each Sage System Library jurisdiction may establish local probationary limits on new borrowers or those unable to provide proof of current jurisdictional residence, property ownership or acceptable ID.

Library cards for permanent residents will expire at a default period of three years. If not renewed or reactivated within two years after the expiration date, the record will be deleted from the database unless there are unresolved blocks on the account.

Cardholder Responsibility Statement

- Cardholders are responsible for all materials checked out on their cards and on the cards of their minor children.
- Lost or stolen cards should be reported at once to one's home library. Materials checked out on a card prior to the date it is reported lost are the responsibility of the patron whose card was lost.
- Borrowing libraries will attempt to notify cardholder by e-mail, mail, or phone when items are overdue.

Library card application procedure

Submit an application and present acceptable ID with proof of residency or property ownership in one's home library jurisdiction.

The application form or resulting library card should provide for the following information

(*required):

Name*

Mailing address*

Physical address if different from mailing address*

1st phone number

2nd phone number

E-mail address

Other contact information (name, phone and/or address)

Date of birth*

Parent or guardian's name (if under 18)*

Valid ID*

Applicant's signature requirement may vary by library

Parent or guardian's signature (if under 18) may vary by library

Date of application*

Circulation Policy

Circulating public and academic libraries will extend library privileges to all Sage patrons with a card in good standing from any other circulating public or academic library in the Sage Library System.

- Academic libraries will provide non-student privileges to other Sage patrons.
- Public and academic libraries that provide library cards outside of their service area (e.g. to non-residents or non-students/staff) must identify such patrons as non-Sage patrons. This can be accomplished through an alert on the patron's record or similarly obvious measures. Sage libraries are not obligated to honor non-Sage patron accounts.
- Patrons will be responsible for following all rules and policies of any library they use.
- Patrons will be responsible for all fines or fees incurred at any library they use including lost or damaged material charges.
- The lending library will be responsible for getting items returned from patrons. Overdue notices will be the responsibility of the lending library.
- The patron's home library will be responsible for keeping patron records up to date and accessible to all other circulating libraries.
- Contact information, telephone number and email, may be updated by other Sage System libraries.
- If the expiration date is renewed manually, set it to no more than 14 days. This allows the patron to work with their home library.
- Patron record deletions will only be performed by home library staff.
- All Sage staff can add notes to patron records if needed. Please include date, library, and initials
- Reference and Special Collection items are generally non-circulating at the discretion of the owning library.

Limits on borrowing, holds/requests, and interlibrary loans

- Cardholders must present their card or acceptable ID to check out items.
- Maximum number of items checked out per card is 50
- Maximum of 15 holds (requests) and/or interlibrary loan requests per public library card at any time.
- Maximum of 20 (change to 30) holds (requests) and/or interlibrary loan requests per educator card at any time.
- At the discretion of each library, holds (requests) on some new items may not be allowed for up to 90 days after accession.

Exceptions

- Special loan periods for library materials or patrons may be approved in exceptional cases by the owning library or the patron's home library, respectively.
Fines or Fees as a result of circulation overriding patron account restrictions will be the responsibility of circulating library. Overrides should be authorized by account sponsor.
Library of things circulation periods may vary among Sage Libraries.

As patterns of demand for existing collections change, items may be moved between the two loan periods listed below at the discretion of the owning library.

Loan period for most materials including ILL

Loan period: 21 days
 Renewals: Two 21 day renewals (see renewals below)
 Fines: Up to a maximum of .20 cents a day and \$5.00 per item
 Grace period: 1 day
 Notices: Defaults:
 7 days after the due date for 1st notice
 14 days after the due date for 2nd notice
 21 days after the due date for invoice
 Notice mailing dates may vary as libraries are not open 365 days a year

Loan period for High Demand materials

Loan period: 7 days
 Renewals: Two 7 day renewals (see renewals below)
 Fines: Up to a maximum of .20 cents a day and \$5.00 per item
 Grace period: 1 day
 Notices: Defaults:
 7 days after the due date for 1st notice
 14 days after the due date for 2nd notice
 21 days after the due date for invoice.
 Notice mailing dates may vary as libraries are not open 365 days a year

Educator patron profile type loan periods for general materials:

Loan period: 42 days
 Renewals: 1 renewals (see renewals below)
 Grace period: 1 day
 Notices: 7 days after the due date for 1st notice
 14 days after the due date for 2nd notice
 21days after the due date for invoice
 Notice mailing dates may vary as libraries are not open 365 days a year

Educator Patron Profile Type loan period for High Demand materials

Loan period: 14 days
 Renewals: 1 (see renewals below)
 Grace period: 1 day
 Notices: 7 days after the due date for 1st notice
 14 days after the due date for 2nd notice
 21 days after the due date for invoice.
 Notice mailing dates may vary as libraries are not open 365 days a year

Renewals

Items, including overdue items, may be renewed twice online, at the library, or by phone with library staff at any Sage Library, provided there are no holds or blocks.

Items on Educator patron accounts may be renewed once online, at the library, or by phone with library staff at any Sage Library, provided there are no holds or blocks.

Auto renewal of items may vary within Sage Libraries

Most items borrowed from outside the Sage system are subject to the loan rules of the owning libraries and may not be renewable. Fines or fees may be different when borrowing these items. Fees may be assessed by lending libraries outside the Sage Library System.

Lost Book Policy

If item is checked out by a patron who does not respond to notices sent:

- It will be the responsibility of the patron's home library to collect the item's cost from the patron for reimbursement to the owning institution.

If the item is lost in transit before reaching its destination library:

- Both libraries involved should attempt to locate the item.

- If the item is not found, an email should be sent to Courier participants in the event that the item was delivered to the wrong location.
- If the item still cannot be located, the Owning institution is responsible for the item's cost

If the item is lost in transit on its way back from the Borrowing institution:

- Both libraries involved should attempt to locate the item.
- If the item is not found, an email should be sent to Courier participants in the event that the item was delivered to the wrong location.
- If the item still cannot be located, the Borrowing institution is responsible for the item's cost.

Lost or Damaged Materials – Responsibility: A loaning library may opt to bill lost or damaged charges for materials lent to the requesting library if not resolved by the requesting library's patron after 60 days. The billing must be within 12 months after the 60 days. Libraries with chronic delinquent reimbursement issues may be subject to loss of local and Sage ILL privileges or increased membership fees. At the discretion of each library, barter and exchange may also be acceptable methods of payment.

Lost out-of-print

The charge for a lost or non-repairable out-of-print item will be based on the estimated market price of a replacement item as determined by the owning library, plus a processing fee.

Damaged

Charges for damaged items that are repairable will be based on the estimated cost of repair as determined by the owning library but will not exceed the current retail price of a new identical item, if available, plus a processing fee.

Items damaged in transit will be dealt with on an individual basis between the libraries involved. Libraries are encouraged to refer to the SAGE Courier Committee with regards to items so damaged.

Processing

A charge for processing may be assessed up to \$10, as determined by the owning library for labor and materials required to reprocess a replacement item.

Unclaimed ILL

After one warning, a Sage member library may assess a maximum \$5.00 fine per occurrence (not per title) for unclaimed ILLs, if not picked up within **a time to be determined by pick up library** after notification, excluding holds on a library's own materials.

Item Fines

Item fines (i.e. overdues, etc.) may be paid at a patron's owning library. These fines may also be accepted at other Sage online libraries. Fines may be retained by the library which collects them.

Borrowing privileges, including placement and triggering of holds, will be suspended for a patron with an outstanding balance of \$5.00 or more.

In the case of lost material charges assessed to a minor, borrowing privileges for the parent or guardian who accepted responsibility for the child's library use by signing his or her application card, and for any and all other cards issued on that adult's signature, may be suspended. Such suspensions may be manually implemented by the home library on an individual, case-by-case basis.

Special materials or circumstances may have different fines or fees applied, such as short loans on equipment, requested material not picked up, etc.

Lost items fee processing

Fees paid for damaged and lost materials should be forwarded to the owning library. Overdue fees in excess of \$25 should be returned to owning library in full.

- Include all of the information regarding patron and items when sending money to other libraries.

Non-payment: consequences

Owning libraries are strongly encouraged to work with borrowing libraries to resolve replacement fee payment issues. Borrowing libraries refusing to pay replacement costs to owning libraries may be subject to the following penalties: 90-180 days: Owning library may opt to withhold ILL lending to chronic delinquent borrowing library 180+ days: Owning library may contact Sage system administrator and request revocation of delinquent borrowing library's Sage circulation privileges. Sage administrator would then take the request to the Sage User Council.

Annual Reconciliation

Sage administration will send a report annually of ILL items that are lost. This report should be sent in January. Billings and reconciliations should be completed before June 30th. In a set time frame libraries will look for lost items and reconcile the losses with owning libraries.

Return Locations

Items may be returned to any Sage Library via the Sage regional courier system without penalty. To reduce possible handling errors patrons are strongly encouraged to return items to the same library where they were either checked out or picked up

Appendix Definitions

PROCEDURES

Patrons requesting a library card from a new home library (i.e. the patron has moved) will be required to resolve any existing charges, notes, or blockages on their existing account. The new home library will contact the “old” home library to inform them of the change in that patron’s home library once any issues have been resolved.

- Check for previous account
- Resolve account with “old library”
- Overwrite (update barcode and home library using edit function) patron account as opposed to creating a new account

- Merging an account is combining two existing records of one person.

When initially reviewing the Evergreen ILL lost item report, the committee recommends that losses over three years old should be written off.

Overriding Patron Type

- Call patron's Home library before overriding limits on patron type.

Notes vs Alerts

- Alerts are action items and should be used for immediate needs on records.
- Notes should be informational in nature.