

NetSouthwest

Best Practices Handbook

A Reference Guide to Policies,
Procedures, and Useful Information

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System Standards Quick Reference Guide:

*Items from the Best Practices Handbook that have been formally agreed upon by the Director's Council.
Adherence to the following ensures that your library is in good standing with the system.*

A. Reserves with available copies filled every day you're open (II.B.)

NetSW members voted to agree that libraries must fill reserves, at a minimum, once every day on which the library is open.

B. Newly Acquired may only be used for the first two months of an item's circulation. (II.C.)

It was voted on and passed at the August 13, 2010 Director's Council meeting that newly acquired should be limited to "the first two months of a new item's circulation." Exceptions are items that are not new but suddenly gain excessive popularity (such as a children's book that is being turned into a movie, which causes an inundation in reserves on that book title). This agreement was reaffirmed at the August 26, 2011 meeting.

C. Your library policy may override the owning library's checkout period. (II.E.)

It was voted on and passed at a NetSW meeting that the checkout location's checkout period may override the owning location's checkout period. This is done manually on a case-by-case basis, and owning library renewal limits should still be honored.

D. New Card Application Workflow and Out Of State Card Workflow (III.A.)

NetSW members voted to adopt the new card application and Out of State Card workflows so that a standard set of criteria are met for new cardholders.

E. Staff User Security Practices (III.H.2)

Members voted to adopt the ILS Security and Privacy Practices section of the Best Practices Handbook as a rule rather than a recommendation because of the shared nature of the ILS.

F. Patron Audit done every 3 years at a minimum (V.A.1.)

WI DPI as well as SWLS requires that a library's patron database is cleaned up and audited, at a minimum, every three years for statistical and county funding purposes.

G. Attendance at NetSW/PLAC Meetings (VI.A.)

Members have formally agreed that each library must be represented at 3 out of the 6 NetSW/PLAC Director's Council meetings in a calendar year to remain in good standing with the system.

I. Cataloging, Acquisitions, and Holdings

A. Barcode Placement

- Books: Upper right-hand corner of the first page
- Board Books: Top corner of the back cover OR upper right-hand corner of first page
- AV materials: Upper right-hand corner of the front cover OR inside the case as long as it is at the top, preferably the right-hand corner whenever possible.

B. Database Holdings Maintenance

- Members are to add and delete their own holdings from specific Bibliographic (Bib) Records. If a library deletes the last holding on a record, ***do not delete the Bib Record***. SWLS staff will do this, since they also need to remove the record from the OCLC database.
- Bib Records found with no holdings attached will be deleted if the “create date” for the record is older than one year.
- It is not necessary to alert SWLS staff if the last holding on a Bib Record is withdrawn. Staff systematically finds these empty Bib Records and delete the records.

C. Bib Records and Holdings

1. New Holdings

- Libraries should add their holdings to Bib Records within two weeks of receiving them. ***All circulating materials should be barcoded and added to the ILS.***
- When adding holdings, search for items in the catalog by ISBN. Make sure the entire Bib Record is consistent with the format being added (Blu-Ray, DVD, Hardcover, paperback, LTE, etc.)
 - For some reprints, ISBN may not match. As long as other Bib Record characteristics match, a holding may be added to that record. Ask SWLS staff for assistance or clarification.
- Make sure items are not attached to ebook/digital records.
- If unsure about which record to add an item to, check with SWLS catalogers. If unable to find an item in the catalog, send the ISBN and title page to SWLS.
- For juvenile materials, hardcover/paperback is not as important and libraries may add either to a given record despite ISBN.
- For serials, search by title and be sure to add the year of the holding in the call number.
- Upon encountering a record with incorrect holdings on it, inform SWLS (headquarters) staff of the discrepancy. If the incorrect holding belongs to your library, remove it and add the item to the correct Bib Record.
- New items added before publication date should be set to the status “In Process.”

2. Multiple Items/Volumes in a Record

- Bib Records will not be created for each individual item in a series (for example, each disc in a television program series DVD set)
- Instead, multiple holdings should be placed on the same Bib Record using Volume Number information to distinguish which part of the item is on each holding.

- Language on individual holdings on items such as a TV series should correspond to the language used on the Bib Record; for example, if each disc is listed as a volume (Volume I, Volume II, etc.) library holdings should reflect this in the volume field. If they are listed as “Disc 1,” “Disc 2,” they should be listed this way in the volume field on individual holdings.
- Periodicals that are entered into Verso should include issue information in the Chronology field so that a specific issue can be requested.

D. Ownership Markings and other information

- Only one ownership stamp/markings is required, but it **should be easily visible.**
- **Items with more than one part/piece should be marked on each piece in case they get inadvertently separated. (Ex: kits, media, etc)**
- Periodicals that are circulated should also include a barcode and ownership mark.
- Items with more than one piece (DVD/CDs with multiple discs, audiobooks, etc) should have the number of pieces/discs listed somewhere prominent. If there is a spare slot for an item (for example, an empty sleeve at the end of an audiobook), it should be marked as empty.
- Suggestions for ownership marking location include:
 - On the Barcode page of print materials
 - On the title page of print materials
 - On the pages (edge of book pages when the book is closed) of print materials
 - On the disc/item AND once on the outside of AV material cases

II. Circulation

A. Placing Reserves

1. Reserves in Verso

- When placing reserves on items in Verso, check that the reserve is placed on the correct account.

2. Reserves via CILL (formerly WISCAT).

- Search the SWLS catalog for items first. If the item is not found, then search CILL.
- For libraries who mediate user requests on CILL, double check that the items are not in Verso before approving.
- For popular materials, check “[Items in Constant Demand](#)” on CILL before placing a request.
- Items which are less than six months old may not be requested on CILL.

B. Filling Reserves

*1. Reserves in Verso (**Reserves with Available Copies/ Holds**)*

(See SWLS/Verso Instruction Manual for assistance)

- Reserves should be checked and filled at least once each day that the library is open.
- If an item that appears on a library’s reserve list cannot be found within one week, it should be marked missing. If it is the only available copy, the library whose patron has a hold on the item should be notified.
- If an item is not in the location of “Newly Acquired,” or part of a non-circulating special collection, the expectation is that the item will be sent promptly if a reserve is placed on it. Libraries should not move items to Newly Acquired to avoid loaning them.

2. Reserves for CILL

- Those using CILL agree to abide by the [DPI’s best practices](#) for Interlibrary Loan.
- If your library will not lend an item to other SWLS libraries, it should not loan it through CILL.
- If your library decides to loan an item that is marked Newly Acquired, move the item to its permanent location and see if there are any SWLS holds before sending it to another system.

3. Special Considerations

- To select a specific copy of an item, un-check “Any Item” and click to checkmark the specific item(s). If more than one item has a checkmark, they will all be put on reserve.
- Special collections (such as the rotating audiobook collection—ABC—and the rotating LTE collection) should not be sent out on reserve. These items do not allow requests to be placed on them.
- When borrowing another library’s item, be sure to treat it appropriately. Avoid stamping, marking, or otherwise altering another library’s material.
- When returning another library’s item in the delivery, first check that it is complete—all discs are included, etc.

C. Blocking Reserves

- To block reserves from other libraries on a new item, use the Current Location “Newly Acquired.” For non-circulating reference materials, use a non-circulating location.
- “Newly Acquired” may only be used for the first two months of an item’s circulation. A library should check its Newly Acquired list monthly to change any items that are older than two months.
- To prevent items that are currently inaccessible within a library from appearing on its reserve list, place the items in a status of “Storage.” This is typically a short-term solution.
- To block reserves on items that are currently inaccessible within a library, place the items in a location of “Storage.” This is typically for long-term storage or facility moving/maintenance.

D. Reserve Limits

- Individual libraries may set limits on the number of reserves a user may place if they choose.

E. Checkout and Renewal Periods and Limits

- Checkout and Renewal Periods and Limits are set by individual libraries according to their policies. These settings can be found in the **Circ Admin** tab in Verso.
- A library policy may override the owning library’s checkout period. This is done manually on a case-by-case basis.
- Libraries should not override owning library renewal limits.
- The automatic renewal feature should not be used according to a DPI recommendation because those circulations would not be admissible on the annual report. There is currently no way to separate those renewals in the statistics.
- *See Appendix I for a chart of Checkout and Renewal Limits by location.*

F. Fines and Charges

- Individual libraries set their own fine and fee schedule. If a library does not collect fines, its fine schedules should be set to zero.
- Fine collection for items checked out at other locations: individual libraries should follow their own fine collection policies. If a library does not collect fines, it may delete fines accrued at that location and should do so regularly if it is within policy to do so, but ***do not delete fines accrued at another location.***
- Users should be informed of their fines regardless of your library’s policy. For questions or notes to other libraries, use the **Messages** area in the user account.
- Fine collection for items checked out at a library location: individual libraries should follow their own fine collection policies. Fines totaling under \$10 can be retained by the collecting library if that library collects fines.
- Fines over \$10 should be sent to the library at which those fines were accrued. Lost item fines and fees should always be forwarded to the owning library.

G. Payment for Lost Interlibrary Loan Items

1. *Lost Items in SWLS*

- Each library decides on its own policy regarding lost items. If a user loses another library's item, the owning library should be notified so they can inform the borrowing library of acceptable/proper procedure.
- Due diligence is requested in attempting to recover items lost by users, especially those items that belong to another library.
- **Lost item fees are the user's responsibility** and, if collected, should be forwarded to the owning library.

2. *Lost items in CILL*

- According to state agreements, **the borrowing library is responsible** for all borrowed CILL items from the moment they are shipped.

H. Overdue and Item Due Notices

- Individual libraries are responsible for running their own overdue notices.
- Overdue notices should be run a minimum of once per week, although whether or not those notices get mailed is up to each individual library to decide.
- Libraries are encouraged to set up Item Due Notices to users with email addresses.

I. User Account Messages, Notes, and Comments

- All user account messages, notes, and comments should include a library's two-letter library code. Some libraries may choose to also require the staff member's initials, a date, or both.
- Only delete your own library's notes or comments. (Messages can only be changed or deleted by the library which wrote them.)
- If an issue is resolved but the message, note, or comment was written by another library, that library should be notified so the message can be erased.
- Libraries should honor blocks placed on user accounts by other libraries; if necessary, contact that library (or have the user contact that library) to resolve the issue.
- ***See Appendix II to see Where Information Appears in Verso.***

III. Library Cards and User Accounts

A. Issuing Cards

- **Before entering a new user into the ILS, the name should be searched for possible duplicates (perhaps from a previous address or maiden/married name).**
- Libraries should issue a physical card to users. This should normally be done immediately upon receiving a completed application form. (There may be an exception at some libraries such as mailing proof, etc.)
- Residents of SWLS can receive library cards by applying in person or by mail at any library in the system.
- Out of state or temporary cards should be issued by following the adopted workflow. *See Appendix III for the adopted workflow for out of state and temporary cards.*
- The issuing library retains the hard copy of an application which holds the user's signature according to its adopted records retention policy. Exceptions include library card sign-up outreach events. (See III. F.)
- Application forms can be found and printed from the SWLS website. *See Appendix IV for an example of a Library Card Application Form.*

B. Replacement Cards

- Individual libraries set their own fee for a replacement library card.
- User account information (address, phone number, etc.) should be verified before the account's barcode is changed and a new card is issued.

C. Forgotten Library Card

- Individual libraries may decide whether or not to check items out to a user who has forgotten his/her library card.
- Users without library cards should be asked to show some form of ID if their identity is not known by circulation staff.

D. Expired Accounts

- Libraries should verify account information when renewing an expired card.
- **Expired users should be removed on a regular basis by all libraries. It is recommended that an expired patron report is run annually.**

E. Entering User Account Information

- When entering a user account into the ILS, it is important to choose the correct Township Code in order to ensure proper county reimbursement. Townships can often be looked up in local plat books or at the following link:
<https://myvote.wi.gov/en-US/MyMunicipalClerk>
- When entering surnames with prefixes (eg: Van Natta, VonFeldt) use the phone book or user's ID as a guide to spacing and capitalization. When entering names with suffixes (eg: John Smith III, David Roberts Jr.), enter the suffix after a comma in the first name field (eg: Last name= Smith, First name= John, III) Spelling should be verified by the user or via their ID.

F. Outreach Events and Digital Library Card Sign Up

1. Outreach Events Where Cards Will Be Issued

- Libraries hosting outreach events are responsible for the cost of library cards issued; those costs do not get passed on to home libraries. Home libraries should check the information on the user account and modify it if necessary before renewing the card for the standard length of time.
- Libraries hosting outreach events should:
 - Have internet access and the ability to check for duplicate cards before issuing new cards to attendees.
 - Use the SWLS standard library card application (rather than a library-specific one, if that library uses a modified version). This can be found on the SWLS website.
 - Send the hard copy of the application to the user's chosen home library (so if Platteville staff were doing an event at SWTC, they would ask each person where they prefer their home library be located. The hard applications would then be sent to that library).
 - Set expiration dates for outreach event-issued cards at one month.
 - Specify in the NOTES field that the card was issued at an outreach event, with the issuing library's name and date.

2. Digital (Online) Card Applications

- Libraries offering digital card applications/issuing cards online should follow the recommended procedure for information gathering and account creation. *See Appendix for standard procedures.*
- Libraries issuing digital cards should:
 - Check for duplicates in the ILS before issuing new card numbers/pins.
 - Set expiration dates at one month and require the user to visit the issuing library in order to receive the card and extend it to regular expiration dates.
 - Specify in the MESSAGES field that the card is a temporary card issued for a digital application.
 - Check for proof of address and other information that was missing on the digital application upon user's first library visit. User should then receive the physical card associated with their account.

G. Card Sharing and Multiple Cards

- Individual libraries should have a policy about sharing cards between more than one person.
- Some libraries may have a policy about giving certain people multiple cards (i.e. a child with divorced parents might have need for two cards—one for dad's house and one for mom's house). This is up to the individual library to manage.
- If a library encounters a user with two user accounts, it is up to the home library/ies listed on the accounts to discuss the best way to resolve the issue.

H. Staff Accounts

1. Staff Account Creation and Use

- Libraries may decide how to assign staff accounts.
- Staff accounts should not be used for checking out materials. User (patron) accounts for staff members should be marked appropriately as residents or nonresidents, not as staff.

2. *ILS Security and Privacy Practices*

- Staff permissions
 - Be sure to know which staff has access to which parts of the ILS
 - Be sure staff is trained to use all parts of their access within the ILS
 - Unverified volunteers should have limited or no access to ILS staff accounts
- New staff usernames and passwords
 - Be aware of what login information to which new staff has access
 - Include privacy training in new staff orientation
- Retiring/departing staff access
 - Passwords on ILS staff accounts to which departing staff had access must be changed promptly
 - Permissions should be checked on accounts to which leaving staff had access.

IV. Van Delivery

A. Procedures

- Stacks of books should be rubber banded in heights not to exceed 4”.
- Books should not be stacked “pyramid style.”
- Routing slips or transit receipts should be taped (top and bottom) using removable tape only.
 - CILL items should not have tape used directly on the item; instead, tape the rubber band to the shipping label or put the shipping label inside the item with its destination visible.
- Routing slips should not be slid underneath plastic covers on items like DVDs.
- Two rubber bands should be used on each item/stack of items.

B. Routing Slips

- Transit receipts (printed from Verso) are a suitable replacement for intrasystem routing slips.
- Intrasystem routing labels for public libraries may be handmade so long as the destination and origination libraries are clearly noted. Libraries shipping items for statewide delivery or school delivery should use the provided routing label templates. ***For templates of Intersystem and Intrasystem routing slips, see Appendix VI.***
- Receipt-style transit slips should reflect a library’s municipality rather than its formal library name (i.e. “Lancaster” rather than “Schreiner Memorial”). This helps delivery drivers, especially substitutes, get items to the correct locations.
- To help save paper for all libraries, transit receipts should only include a library’s name. Library addresses, phone numbers, and other messages are unnecessary.

C. Supplies

- SWLS will handle bulk orders of library cards and barcodes. For more information, contact SWLS headquarters.

D. Handling Other Libraries’ Materials

- Before sending another library’s materials in the delivery, please be sure that the material is complete. Check for missing discs, etc.
- Upon receipt, verify that the material is complete. Check for missing discs, etc.
- Use only removable tape on other libraries’ materials.
- Avoid stamping, marking, or otherwise permanently altering another library’s material. If a library stamps due dates in its own materials, use a post-it note or other removable method for materials belonging to another library.
- If an item arrives from another library damaged, make a note that it was received in that condition.
- If another library’s item is returned damaged, make a note of where it came from so the owning library can follow up.

E. Rotating Collections

- Rotating collections (ABC and LTE) should not be sent in transit for reserves.
- When it’s time to move the collection to the next location, use only dedicated ABC or LTE rotating collection bins. Label the bin with the destination you’ve been assigned.
- **It is not necessary to check every item in before sending the collection.**

V. ILS Maintenance Activities

A. List of Annual Maintenance Duties (*See Appendix G for a recommended calendar of maintenance activities, or the SWLS/Verso Instruction Manual for guidance on completing the tasks.*)

1. Expired Patron Maintenance

Users who have been expired for a certain length of time should be deleted from the system. Exceptions are users with large fines or lost items. Each library may choose the length of time a user account must be expired before it is deleted; a common choice is one year.

2. Annual Report Preparation

A. Material Types—A library that does not own any Art Prints should not have any materials with the Art Print material type.

B. Township Codes—Check that Township Codes are correct on all user accounts- improperly attributed Bridgeport Township and ILL/Institution Township codes are common mistakes made in user accounts.

C. Patron Categories—Make sure that user accounts are not inappropriately marked as homebound or Library Staff.

D. Items Without Prices—A collection should not have items with no price; this makes annual report numbers harder for SWLS to compile.

3. Delete Lost and Missing Items

In order to maintain the database, it is important to delete items that have been lost or missing for a long time; a common choice is to delete items that have been lost or missing for more than one year. Lost item fees remain on user records when the material is deleted.

4. Aging Juveniles to Adult Users

In order to keep the database as accurate as possible, resident and non-resident juveniles should be changed to resident and non-resident adults as they turn 16 (based on state statute). This can be set up to be done automatically through the reports section.

B. List of Regular Maintenance Duties

1. In Transit Items (To My Library and From My Library)

Each month, someone in the library should check the shelves for all items in these categories. If found, the item should be checked in (and, if applicable, sent in transit).

2. Move Overdue Items to Patron Lost

This will help maintain the shared database and keep it as accurate as possible. This can be done with a monthly scheduled report.

3. Check shelves for Missing, Claimed Returned, and Patron Lost items

Shelf lists can be scheduled to run for these items if desired.

4. Move items older than 2 months off of Newly Acquired

A report can be run that will list all items marked “Newly Acquired.” Their barcodes can be entered into “Temporary Transfer Return” to move them to their permanent collections.

6. Check settings in Circ Admin

Due to frequent Verso updates from AutoGraphics which sometimes affect settings without warning, it is a good idea to be familiar with the library’s settings and check that they’re consistent each month.

VI. NetSouthwest Committees, Meetings, and Duties

A. NetSouthwest Meetings

- Meetings are held six times per year (every other month). Decisions are made at these meetings that directly affect this Best Practices Guide as well as financial obligations for ALL NetSouthwest libraries
- **A representative (either the director or someone authorized to vote on behalf of the library) should attend at least three of these meetings per year, including the June budget meeting.**
- Meeting minutes will be recorded on a volunteer basis.

B. Committee Formation and Meetings

- Committees are formed as necessary and comprised of those volunteering to serve on said committee.
- Individual committees decide when, where, and how often they need to meet.

C. Role of SWLS in Best Practices

- SWLS staff does not create the Best Practices but will have input on the Best Practices committee.
- SWLS staff will maintain the accuracy of the Best Practices Guide and associated materials.
- SWLS staff will help inform member libraries about best practices and assist in the implementation of these activities.
- SWLS staff will serve as a resource for ILS training and/or troubleshooting.

VII. Best Practices Guide Appendix

A. Renewal Limits by Library (last updated Jan 2020)

<u>Renewal Limit Policies</u>			
<u>Library</u>	<u>Books</u>	<u>DVD</u>	<u>Audio</u>
Argyle	2	2	2
Barneveld	4	4	4
Belmont	3	1	1
Benton	2	2	2
Blanchardville	2	1	2
Bloomington	2	1	1
Boscobel	2	2	2
Cassville	2	2	2
Cobb	3	3	3
Cuba City	2	2	2
Darlington	4	2	2
Dickeyville	2	2	2
Dodgeville	3	3	3
Fennimore	3	3	3
Gays Mills	3	1	3
Gratiot	2	2	2
Hazel Green	2	1	2
Lancaster	2	2	2
Livingston	2	1	1
Lone Rock	2	2	2
Mineral Point	4	2	4
Montfort	3	3	3
Muscoda	1	0	1
Platteville	1	1	1
Potosi	2	2	2
Prairie du Chien	3	0	3
Richland Center	2	2	2
Shullsburg	2	2	2
Soldiers Grove	3	3	3
Viola	2	1	2

B. Where Information Appears in Verso User (Patron) Records

- A **Message** pops up on the screen as a warning when an account is called up. The library which wrote the message must delete it in the **Patron Edit** screen.
- A **Note** appears in the **Notes** tab in a user's account. This tab turns red when there is a note in that tab. Any library can delete the note from **Notes** or the **Patron Edit** screen to make the **Notes** tab turn black. Libraries should only remove notes authored by their own library.
- A **Comment** appears in the **Patron Summary** tab. This tab does not turn red. Any library may delete the comment from the **Patron Edit** screen to remove it from the Patron Summary. Libraries should only remove comments authored by their own library.

*REMINDER: Patron users CANNOT see **notes, messages, or comments** from their personal account. Only library staff can see them.*

- **Primary/Home Phone Number** is the only number to appear in the user account search screen AND the only number to print on reserve receipts.
- **Cell Phone, Work Phone, Pager Phone, and Unlisted Phone** only appear in the Patron Summary and Patron Edit screens. If you use text notifications, the cell phone number must be entered with no characters or spaces.
- **Linking Households:** When you link a household, it is important to begin the process from the Adult record (mother or father, etc.) This is because overdues and hold notices are mailed or emailed to the "head" of the household. Therefore, if you start with a child, that child could potentially be receiving overdue notices for his/her parent's items.
- **Notification Preferences:** At the bottom of the Patron Edit screen, there is a Notification Preference dropdown menu. This is for overdue and item due notifications. There is a second dropdown for reserve notifications.
 - **None:** Overdues will always print out for mail. Reserve notification will not be automatically sent.
 - **Email:** Overdues and reserve notices will be emailed automatically (the user must have an email address to choose this option.)
 - **Paper:** Overdues will print out for mail. Reserve notification will not be automatically sent.
 - **Phone:** DO NOT CHOOSE. This is for library systems that have automatic phone messaging systems.
 - **SMS:** (Only visible to libraries with Text notifications turned on) Overdues will be sent via text message. Because of the length of these notices, it is not recommended to use. Reserve notifications are sent via text message.
- **Email Me On:** Users can choose to get a weekly account status email. Choose the day of the week for that email to be sent. If they don't want a weekly email, select "No."

C. Workflow for Issuing Temporary and Out of State Library Cards

1. Fill out application, including identification confirmation (driver's license preferred; State ID, Military ID, Tribal ID, Governmental ID, work visa, or Passport # also acceptable)
2. Confirm address and other information from standard card application.
3. Offer the user two options (if your library chooses to do both): an **in-house/temporary out of state card** which only grants access to that specific library (or that library and its branches, if applicable) or a **system out of state card**.
 - a. For In-House out of state library cards, use the **orange** card. Charge the user what your library board has settled on as the fee. Set an expiration date one year from today's date. Identify your library on the card before issuing to the user. Also put a note in the **Message** field of the user account: *"Local Out of State Card issued at (your library)."*
 - b. For System-Wide out of state library cards, use the **green** card. Charge your user \$100 PLUS your library's in-house fee. \$100 is sent to SWLS, % System Director. Set an expiration date one year from today's date.
4. Check that "Township Code" is listed as out of state and that the patron category is correct as well.

Rules for in-house out of state library cards:

1. Patron may only check out books and place holds on books owned by the issuing library. They may not use their card at another library (unless that library has a branch, in which case they may use the branch library).
2. Patron may not use SWLS ILL or WISCAT (CILL), or any system or state funded resources including OverDrive and Badgerlink, unless using them from within the library.
3. Cards expire one year from date issued; the fee must be paid annually. (Library boards set their own fee for this type of card.)
4. User must present his/her card at time of service.

Rules for temporary residents:

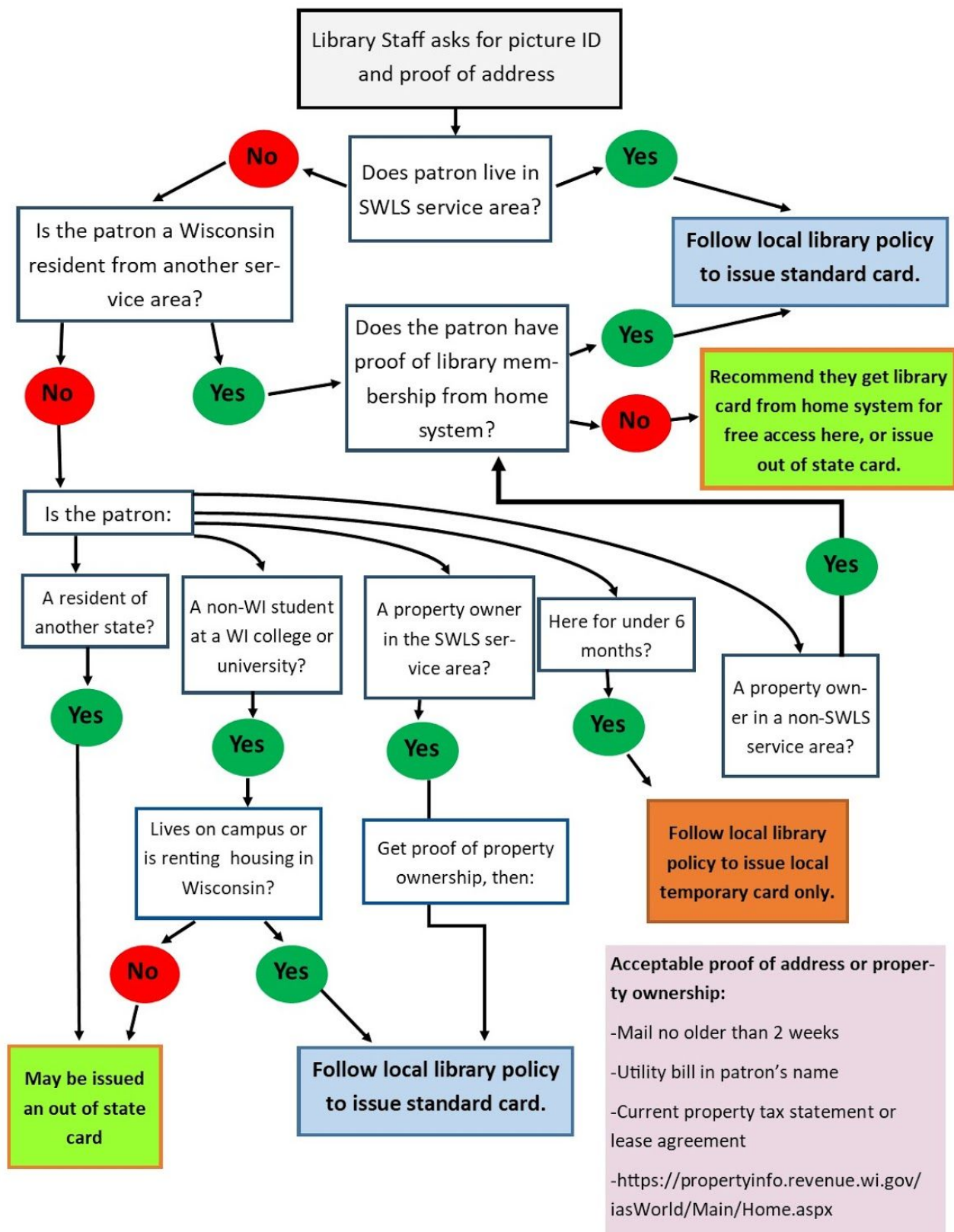
1. If the individual will be living in WI for fewer than 6 months (and doesn't own property in WI), they may only be issued an in-house library card for that specific library. (Library boards set their own fee for this type of card.)
2. Temporary users may only check out books and place holds on books owned by the issuing library. They may not use their card at another library (unless that library has a branch, in which case they may also use the branch library).
3. Temporary users may not use SWLS ILL or WISCAT (CILL), or any system or state funded resources including OverDrive and Badgerlink, unless using them from within the library.
4. Additional restrictions and expiration date are decided by individual libraries.

5. User must present his/her card at time of service.

Rules for system-wide out of state cards:

1. User may use their out of state card for SWLS ILL and may use any SWLS library.
2. Out of State user may not use WISCAT (CILL) or any state funded resources including OverDrive and Badgerlink, unless using them from within the library.
3. Cards expire one year from date issued; fees must be paid annually. (Library boards set fees in addition to the \$100 SWLS fee for this card.)
4. User must present his/her card at time of service.

See next page for Library Card Application Flowchart



D. Example of a Library Card Application

Cardholder's Name		BARCODE STICKER	
<i>First name</i>	<i>M.I.</i>	<i>Last name</i>	
Address 1 _____			
PO Box Address _____			
City/State _____		Zip _____	
Address 2 _____		State _____	Zip _____
My residence is located in _____		COUNTY	
and in (check <input type="checkbox"/> one)		_____ T ownship	_____ C ity
		_____ V illage	
Name of T wp, C ity, OR V lg _____			
Email _____		@ _____	
Primary Phone (____) _____		Alternate Phone (____) _____	
Date of Birth _____			
Parent/Guardian Name <i>[print]</i> _____			
Valid Driver's License or State ID required for all applicants (Parent/Guardian must provide a Driver's License or State ID # for unlicensed applicants under age 16.)			
State _____ DL# or other valid ID _____			
Language _____ English		_____ Spanish	Other _____
Signature of the applicant or juvenile applicant's Parent/Legal Guardian verifies their acceptance of library policies, including the Internet Use Policy, of financial responsibility for all use made of the library card issued to this applicant, and that the information herein is correct.			
_____ <i>(Signature of applicant/Parent/Legal Guardian)</i>			
Submit this application form to your local SWLS Member Library for processing.			

See the SWLS website for printable templates.

E. Digital (Online) Library Card Application Procedure

1. Collect the following information from the individual:
 - a. Name (First, Last, and Middle Initial)
 - b. Email address
 - c. Date of Birth
 - d. Address (including street address, City, State, and Zip Code)
2. Check Verso for users with cards already in the system. Avoid creating duplicate accounts. Instead, update current accounts.
3. Create a new account using the information provided. This account should be set to expire one month after issuing the card. Check the address and verify the township code is correct.
4. Contact the new user with account number and password/pin information. Inform them that they must visit the library within a month to complete the transaction and turn the temporary card into a permanent account (extending expiration out to standard time). They'll need to bring proof of address and their ID. They will then be given the physical card associated with the account.
5. Place a notification in the Messages field of the account stating that it was created as a temporary card for a digital application. This may be deleted once the individual visits the library and receives their card.

Digital card applications should not be used for:

- Out of State individuals
- Individuals who live outside of the SWLS region
- Minors/Juveniles

F. Label Templates for Delivery

SWLS VAN ROUTE DELIVERY SERVICE
Please circle or highlight the library

ARGYLE (AR)	HAZEL GREEN (HG)
BARNEVELD (BA)	LANCASTER (LA)
BELMONT (BE)	LIVINGSTON (LI)
BENTON (BN)	LONE ROCK (LR)
BLANCHARDVILLE (BR)	MINERAL POINT (MI)
BLOOMINGTON (BT)	MONTFORT (MO)
BOSCOBEL (BW)	MUSCODA (MU)
CASSVILLE (CA)	PLATTEVILLE (PL)
COBB (CO)	POTOSI (PO)
CUBA CITY (CU)	PRAIRIE DU CHIEN (PR)
DARLINGTON (DA)	RICHLAND CENTER (RC)
DICKEYVILLE (DI)	SHULLSBURG (SH)
DODGEVILLE (DO)	SOLDIERS GROVE (SO)
FENNIMORE (FE)	VIOLA (VI)
GAYS MILLS (GM)	SWLS (AA)
GRATIOT (GR)	

FROM: _____ **DATE:** _____

Print on blue paper

Regular member library transit slips:
May print on white paper if desired.

Route to _____
(System Delivery Hub)

For _____
(Receiving Library)

Date _____

Notes _____


From _____

Wisconsin Libraries Delivery Network

WISCAT (statewide delivery) routing slips

Print on blue paper

SWLS INTRASYSTEM DELIVERY SERVICE
for Academic, School, & Special Libraries



TO: _____

FROM: _____

DATE: _____

Multi-type routing slips for schools and special libraries: May print on white paper if desired.

See the SWLS website for printable label templates.

G. Suggested Calendar for ILS Maintenance Activities

This list is only a suggested timeline; if a certain activity works better at a different time in a month or throughout the year, feel free to adjust your own library's schedule accordingly.

JANUARY

Monthly Tasks:

- Jan 2: Remove Newly Acquired
- Jan 8: Check In Transit Items
- Jan 15: Check Shelves for Missing, Lost, & Claimed Returned
- Jan 22: Move Overdue Items to Lost
- Jan 30: Check Settings in Circ Admin

Special Tasks:

- Delete Lost and Missing Items from your collection

FEBRUARY

Monthly Tasks:

- Feb 2: Remove Newly Acquired
- Feb 8: Check In Transit Items
- Feb 15: Check Shelves for Missing, Lost, & Claimed Returned
- Feb 22: Move Overdue Items to Lost
- Feb 28: Check Settings in Circ Admin

Special Tasks:

- **NetSW Director's Meeting**

MARCH

Monthly Tasks:

- Mar 2: Remove Newly Acquired
- Mar 8: Check In Transit Items
- Mar 15: Check Shelves for Missing, Lost, & Claimed Returned
- Mar 22: Move Overdue Items to Lost
- Mar 30: Check Settings in Circ Admin

Special Tasks:

- Check your Fine Amounts, Loan Periods, and Renewal Periods

APRIL

Monthly Tasks:

- Apr 2: Remove Newly Acquired
- Apr 8: Check In Transit Items
- Apr 15: Check Shelves for Missing, Lost, & Claimed Returned
- Apr 22: Move Overdue Items to Lost
- Apr 30: Check Settings in Circ Admin

Special Tasks:

- Check that you have your reports scheduled for aging Juveniles to Adult Users
- **NetSW Director's Meeting**

MAY

Monthly Tasks:

- May 2: Remove Newly Acquired
- May 8: Check In Transit Items
- May 15: Check Shelves for Missing, Lost, & Claimed Returned
- May 22: Move Overdue Items to Lost
- May 30: Check Settings in Circ Admin

Special Tasks: None

JUNE

Monthly Tasks:

- Jun 2: Remove Newly Acquired
- Jun 8: Check In Transit Items
- Jun 15: Check Shelves for Missing, Lost, & Claimed Returned
- Jun 22: Move Overdue Items to Lost
- Jun 30: Check Settings in Circ Admin

Special Tasks:

- **NetSW Director's Meeting**

JULY

Monthly Tasks:

- Jul 2: Remove Newly Acquired
- Jul 8: Check In Transit Items
- Jul 15: Check Shelves for Missing, Lost, & Claimed Returned
- Jul 22: Move Overdue Items to Lost
- Jul 30: Check Settings in Circ Admin

Special Tasks: None

AUGUST

Monthly Tasks:

- Aug 2: Remove Newly Acquired
- Aug 8: Check In Transit Items
- Aug 15: Check Shelves for Missing, Lost, & Claimed Returned
- Aug 22: Move Overdue Items to Lost
- Aug 30: Check Settings in Circ Admin

Special Tasks:

- Expired Patron Maintenance
- **NetSW Director's Meeting**

SEPTEMBER

Monthly Tasks:

- Sept 2: Remove Newly Acquired
- Sept 8: Check In Transit Items
- Sept 15: Check Shelves for Missing, Lost, & Claimed Returned
- Sept 22: Move Overdue Items to Lost
- Sept 30: Check Settings in Circ Admin

Special Tasks:

- Check all staff accounts for your library. Make sure they have the correct permissions and there are no outdated or expired staff accounts.

OCTOBER

Monthly Tasks:

- Oct 2: Remove Newly Acquired
- Oct 8: Check In Transit Items
- Oct 15: Check Shelves for Missing, Lost, & Claimed Returned
- Oct 22: Move Overdue Items to Lost
- Oct 30: Check Settings in Circ Admin

Special Tasks:

- Annual Report Preparation: Check and, if necessary, correct Material Types for your collection (Art Print, etc)
- **NetSW Director's Meeting**

NOVEMBER:***Monthly Tasks:***

Nov 2: Remove Newly Acquired

Nov 8: Check In Transit Items

Nov 15: Check Shelves for Missing, Lost, & Claimed Returned

Nov 22: Move Overdue Items to Lost

Nov 30: Check Settings in Circ Admin

Special Tasks:

· Annual Report Preparation: Check Township Codes and Patron Categories with a Patron listing (found in Circ Reports: Run Reports)

DECEMBER***Monthly Tasks:***

Dec 2: Remove Newly Acquired

Dec 8: Check In Transit Items

Dec 15: Check Shelves for Missing, Lost, & Claimed Returned

Dec 22: Move Overdue Items to Lost

Dec 30: Check Settings in Circ Admin

Special Tasks:

· **NetSW Director's Meeting**