

**NORTH COUNTRY LIBRARY SYSTEM
JAB (JOINT AUTOMATION BOARD) USERS GROUP
POLICIES**

(The approval date for each item is shown in parenthesis)

A. Patrons Records:

1. Patrons that have been inactive for over five years will be purged. Patrons with fines/bills/etc will not be purged. The purge will take place once a year (10/2005)
2. It is our goal that there will be only one patron record for each patron. Therefore, the libraries agreed to accept other SIRSI library cards from other libraries in this system and to encourage patrons to have only one registration record. (11/1999)
3. In general, the understanding is that the patron's home address would determine which library got to "claim" them as a patron. But the exceptions include where the patron frequents also. Some libraries keep their own registration files which they use as a patron count, since those people do come and use the library and therefore, should be counted as a patron. (4/2005)
4. If the patron has moved or legally changed names, or would like a card from the new library, that library will change the database information and notify the original library that the change has been made. (05/2007)
5. Several new libraries were concerned about what to do with problem patrons and fines that existed before they automated. Everyone agreed that it was a good idea to have them in the database to prevent those patrons from getting cards at other libraries. It was agreed that the patrons would be added (using whatever information is available), but given a different patron number. The number would actually be the library's three letter code, followed by a unique number. (10/2004)

B. Patron Information:

1. Verify user identification using the following sources (check to see if ID includes name and current address and matches the information the customer has written on the application form). Driver's license, non-driver's license, checkbook, bill, school id, personal identification by known user, parent with child. (10/2006)
2. The following information is REQUIRED for each patron record: (04/2009)
 - i. First Name
 - ii. Middle Name
 - iii. Last Name
 - iv. Street
 - v. City
 - vi. State – US Postal Code (2 letters) (04/2009)
 - vii. Zip Code
 - viii. Phone (10/2005)
 - ix. Town/Village (User Cat1) (10/2005)
 - x. County (User Cat2)
 - xi. Birth Date (Located on the Demographic Tab) (06/2008)
3. Email is a recommended field (type text as it appears on registration card & only one address) (04/2009)
4. Student ID is a recommended field (10/2005)
5. The libraries agreed that Social Security Numbers should not be part of the patron database. NCLS will either remove them or provide a list of the patrons that need to have that information removed (10/2005)
6. Telephone numbers will be standardized. The format is 315-782-5540. (10/2005)

7. The libraries agreed to use full legal names typed in upper case. (04/2009)
8. All patron information will be typed in upper case, except email addresses. (04/2009)
9. Address information should be spelled out and not abbreviated. The address should be the physical location of the resident. The PO Box can be included but should not be the only address information. (04/2009)
10. No middle name, type (NMN) in the middle name field. (04/2009)
11. When staff is made aware that patron information is not current the following notation is made in the corresponding field (not current mm/dd/yy) ex. 123 MAIN STREET (not current 03/20/09) (04/2009)
12. The Care/Of information is to be entered in the Address 1 section of the patron record. This way the information will display anytime the patron information is on the screen. The address, phone, email, etc... of the “care/of” person will be entered in the Address 3 section of the patron record. (05/2010)

C. Open Entries and Multi-volume sets:

After much discussion regarding open entries for magazines and travel guides/reference material, etc, the following format was agreed upon: (5/2004)

APR 2004

APR/MAY 2004

APR 24 2004

APR 24/31 2004

DEC 24 2003/JAN 7 2004

641.53 GRAY |z 2004 24th A-G V02 BK02 TAPE02 (04/2009)

D. Fines:

1. Fines \$5.00 or less will be kept by the library that collects the fines. Fines over \$5.00 will be sent to the library where the fines are due. If the patron is making out a check, the check should be made out to the owning library. As a courtesy, the library will email the owning library regarding the fine collection. (11/1999)
2. If a patron is unwilling or unable to pay the fine, the policy of each individual library will be in effect. If it is the policy of the library to not lend items out to patrons with more than \$5.00 in fines, then the policy is in effect regardless of the fact that the fines are due at a different library. (11/1999)

E. NCLS Catalog:

1. Each library is given the choice of searching “ALL” libraries or just their own library holdings by default when a patron performs a quick search. (5/2004)
2. The libraries voted to have buttons for “title”, “author”, etc. instead of a pulldown menu in the quick search window. (5/2004)
3. The libraries wanted the e-library timeout removed. This was done. (10/2004)
4. The ability for the patrons to renew online (May/2005)

F. e-Library Pins:

When a patron is given a new card, the library staff will have to manually delete the automatically generated PIN and then add the correct PIN to the information. (5/2004)

G. System Upgrades (10/2004)

1. NCLS will notify all the libraries, in advance, when planning to do an upgrade

2. NCLS will try to identify the things that will be changing after the upgrade
3. The upgrade release notes will be made available to the libraries
4. The libraries understand that not all changes will be able to be documented
5. When doing a system upgrade, there is no choice of which options can be installed
6. Upgrades will be done during off hours as much as possible to minimize the impact on the libraries.

H. Items:

1. When items are discarded, damaged or missing, the staff should check that item out to that user (Discard, Damaged, Missing), not change the location. Each library is responsible for running a report to address the items that are Missing, Damaged, Long overdue, etc..(5/2010)
2. A list of recommended call numbers is provided by NCLS and is located on the NCLS webpage. Each Library will create a standard call number list to assist staff with consistency when adding items to the collection. (04/2009)