

WRLSWEB Rules and Guidelines

Established by the Network Advisory Committee (NAC)

Note: The date in parentheses following each item heading indicates when the issue was decided. In most cases this is the date of the minutes that describe the Committee's actions.

RULES

The NAC has defined Rules as practices and procedures which all WRLSWEB members agree to follow except in extreme or unusual situations. Current Rules are listed below:

BOOK DROP CHECKIN (1/8/2004): WRLSWEB members will use book drop checkin for any items returned during the library's closed hours. Book drop checkin is defined as using a pre-set checkin feature of the software or by setting the checkin date as the last date the library was open.

CHECKOUT LOCATION PARAMETERS, Following (2/11/10 - 4/8/10): ILS profiles will be set up so that checkout location parameters will be in effect for all checkouts, regardless of which library owns the item.

COMMUNITY NAME on Barcodes (11/16/2000): Item barcodes will identify members by using the name of the community rather than the library. If there is space on the barcode, and the library's name includes the name of its community, the full library name will be printed.

COMMUNITY NAMES as Holdings Indicators and other Identifiers (7/17/2002): For WRLSWEB purposes generally, the community name will be the lead identifier and, if space permits, a memorial name may be attached. Example: Mauston (Hatch).

CONVERSION PROCESS (3/29/2001): The conversion process for a library joining WRLSWEB will be to directly search the WRLSWEB database and:

1. If a matching record is found, the library will add their holding to that record.
2. If no match is found the library will use the MARC Requests feature on the WRLS intranet to request a bib record. The library will then enter its holdings on that record as soon as it appears in the catalog

FINES, Handling of: Given the movement of patrons from one library to another the collection of fines and fees issued by one library could be a collection concern at another library. In order to avoid unwieldy recordkeeping any fine of less than \$10.00 will be retained by the collecting library, regardless of what library issued the fine. Any fine of \$10.00 or more will be forwarded to the issuing library.

HOME LOCATION DATA for the User Record, Determining the (9/9/2004): A patron's Home Location in the user record will be the library in the municipality where he or she registers. If the patron lives in a municipality or township that does not have a WRLSWEB library the Home Location will be the member library nearest to where the patron first registered for a library card, unless the patron prefers to set a different Home Location.

ITEM BARCODE ORDERS (6/7/2007): Item barcode orders will be placed twice a year, in April and October.

ITEMS WITH RESERVES, Treatment of Patrons Holding (1/8/2004): If a patron approaches the circulation desk of any WRLSWEB library with a book in hand which they wish to check out but which has a reserve, the reserve should be overridden and the patron allowed to check out the item. Likewise, if a patron wishes to renew an item, and there are other available copies, the patron will be allowed to renew. The only time a checkout or renewal would be denied is if the patron is returning the item with the intention of renewing it and there are no other available copies in the system. In that case reserves will take precedence over renewals.

LENDING RESTRICTIONS and OPEN ACCESS (4/7/2005): All WRLSWEB members are expected to lend all circulating materials to all patrons. If a library chooses not to lend any category of materials its patrons cannot borrow those types of items from other libraries.

LOST AND DAMAGED MATERIALS (3/20/2002): All WRLSWEB libraries agree to do whatever they can to protect other member libraries from loss of their materials. This includes taking all reasonable measures to recover borrowed items or to secure payment from the borrowing patron for lost or damaged material. All libraries will carefully examine returned items for damage and missing pieces before checking in.

MAILER AND PHONE CHARGES, Responsibility for when joining (5/8/2003): Part of the process of joining WRLSWEB includes adding and modifying patron records. Once a library has added a patron record and the patron is listed as a user in WRLSWEB the software begins to assign the cost of notices to that library. Whenever one of its patrons has an overdue, reserve, or other printed or phone notice, charges will accrue, even if the library is not yet using WRLSWEB software for circulation control.

MAXIMUM FINES (6/10/10): Libraries will adopt a universal maximum overdue fine of \$5.00 per item for all routinely circulating item types.

PATRON GROUPS, Township Level (8/7/2008): Patron Groups for all legal jurisdictions in all counties in or adjacent to WRLS have been entered into the ILS software. The NAC has agreed that:

1. In every applicable situation the specific township Patron Group will be utilized.
2. When registrations are entered, reviewed, or renewed the township level Patron Group will be applied.
3. Each patron's accurate jurisdiction will need to be determined by library staff and coded properly in the registration record by assigning the correct Patron Group.
4. Eventually the Patron Groups for patrons living in communities without libraries will cease to exist at the county level.

PAYMENTS from Delinquent Patrons (7/8/2004): When taking payments from delinquent patrons, the following procedures will be followed:

1. If a library attaches a note to a patron record in the WRLSWEB database requesting unique handling of a delinquent patron, this notice will be adhered to in each and every case. This is especially important if the note indicates the patron is in collection.
2. Any library collecting payments from delinquent patrons will forward those payments to the library which issued the charge. WRLS has a standard payment envelope which members may choose to use. If not, the following information should be sent:
 - a. Item barcode
 - b. Title of the item
 - c. Author (if applicable)
 - d. Format
 - e. Patron barcode
 - f. Patron's name
 - g. Name of the library transmitting the payment (Collecting Library)
 - h. Name of the staff person handling the transaction.
 - i. Payment information, including:
 - i. Amount of payment
 - ii. Date of payment
 - iii. Amount cleared from the patron's record

PIN PROTOCOLS (1/23/2002): A Personal Identification Number (PIN) will be assigned to each patron at registration, under the following rules:

1. A PIN is required in order for patrons to access personal information.
2. The PIN will be the last 4 digits of their primary phone number, unless the patron specifies another PIN at the time of registration.
3. Patrons can change their PIN at any time, either by accessing their account directly or with the assistance of staff.

REGISTRATION INFORMATION, Minimum Required (1/25/2001) The following data is the minimum that must be provided or the applicant cannot receive a library card:

1. Barcode
2. Home Location (see "HOME LOCATION DATA" for more information).
3. Applicant's primary telephone number (if he or she has a telephone)
4. PIN (see "PIN PROTOCOLS" for more information)
5. Applicant's last name, including suffixes like Jr. or III if applicable (e.g. "Jones Jr., John P)
6. A Patron Category
7. A Patron Group identifying the applicant's place of residence (city, village, township), See "PATRON GROUPS, Township level" for more information.

8. Applicant's Primary Address 1, City, and State
9. Applicant's Primary Address 2, if different from or additional to Primary Address 1
10. Information to verify the applicant's identity, entered on the Alternate ID line. Each library can determine what will be acceptable for verification of identity, although a driver's license or other official identification number is strongly recommended.
11. Name and (if different) address of parent or guardian for children applying for library card , entered on the Alternate Contact and Alternate Address lines.
12. Signature of the applicant
13. Signature of an adult who has responsibility for a child who is applying for a library card. Local policy will define 'child'.

RENEWALS, Standard Practice for (6/4/09 - 10/1/09): WRLSWEB members will adopt the following parameters:

1. Up to three renewals will be allowed for all circulating materials, using the initial loan period as the loan period for each renewal.
2. No renewals will be allowed on items with reserves and no available copies.
3. Renewals will be allowed on overdue items.
4. No overrides, extensions, or exceptions will be allowed after the three renewals have been used.

RESERVES, Local vs. Network (7/8/2004): Within ILS software it is possible to set parameters that would allow local items to be used exclusively to satisfy local reserves before they were sent outside the library to satisfy other reserves. While this would reduce the amount of traveling that local items would do, it would also undermine the reserve queue by ignoring the first-made-first-satisfied structure. Therefore, the next available item will always be used to satisfy the next hold in the queue, regardless of ownership or pickup location.

GUIDELINES

The NAC has defined Guidelines as practices and procedures that are strongly recommended as advisable, but not required. Current Guidelines are listed below:

BARCODE PLACEMENT on Items (11/16/2000): The preferred location for item barcodes will be horizontally in the upper right corner of the back of the item.

CLAIMED RETURNED, Handling (6/7/2007): Because Claimed Returned is not used universally and each library has different desires as to how their items should be designated, it is recommended that a library receiving a claim for an item they don't own should call the owning library before designating the item Claimed Returned. If the library is closed at the time of the claim, use email to explain the situation.

CONVERSION for Joining WRLSWEB, Completion of (9/11/2002): From the date that a library has access to the WRLSWEB software it will have nine (9) months to migrate 60% of its holdings and add them to the WRLSWEB database. From the date that the library begins using the WRLSWEB software for circulation control it will have six (6) months to complete conversion of all item and patron records.

FINE THRESHOLDS, Uniformity of (7/7/2008): Each library is encouraged to set its fine threshold at \$10.00, although this is ultimately a local decision under the control of a local library board. Other members are encouraged to refuse service to patron exceeding this threshold until the matter is resolved with the library assessing the charge.

NOTICES, Handling (5/13/2004): It is recommended that all members choose one of the following two options for handling patron notification:

1. The library may choose to have all notices handled centrally, using the mail and the telephone notification system. Under this option all notices for overdues, bills, and reserves will be handled by the ILS software.
2. The library may choose to handle its own notices. Under this option files of needed notices will be made available, either by email or within the ILS software. The library will then notify patrons by whatever method it prefers.

REGISTRATION FORMS, Archiving of Signed (3/29/2001): WRLS will provide a single part registration form for those libraries which choose to use it. Each library will decide whether and how it will retain its registration forms.