CARL.X & CARL.Connect Manual

Note: The CARL Manual is being moved to Metro Support. Try searching 'credit card', 'special stop', 'returned mail', or 'periodical'. Not finding something in Metro Support? Keep checking! The manual is being moved section by section.

Last Updated: October 28, 2024

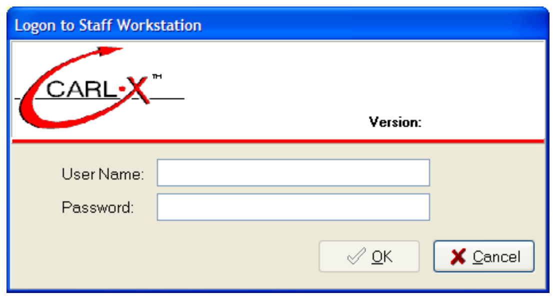
CARL.X

CARL.X BASIC NAVIGATION

LOGGING IN & OUT

The CARL.X shortcut is on the desktop on each PC for easy access to the Staff client.

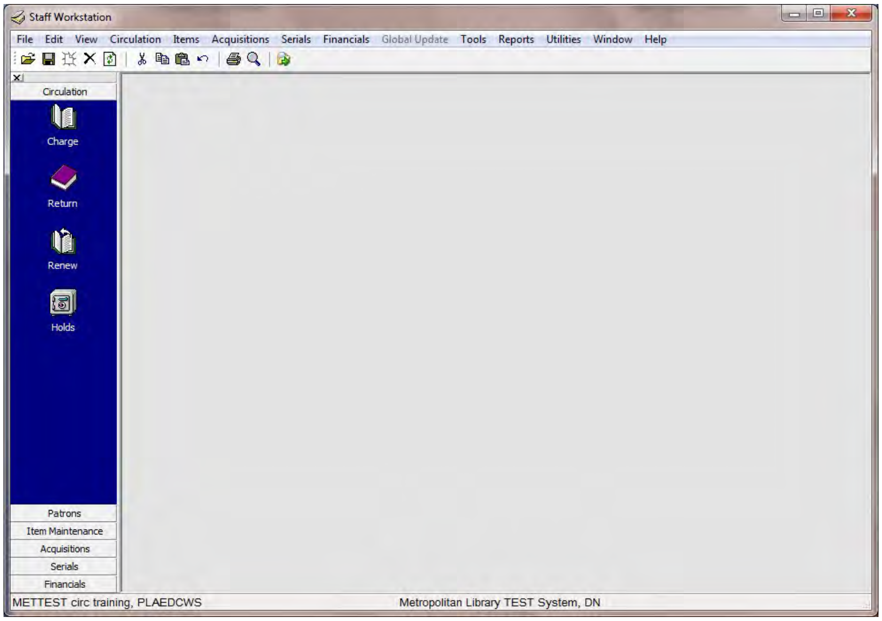
Logging In: The logon window appears when the CARL.X Staff workstation is launched. A valid User ID and Password are required at the Logon window to access the Staff workstation. ID and Password are case-sensitive. There are no minimum requirements in setting CARL.X passwords.



> ***HINT:*** *Passwords should be something that can be entered quickly (you will be logging in and out A LOT each day).*

DO NOT share your login and password! The system will log who completes each action in the system. Logins assist in tracking down the source of reported problems in the way the system is functioning. Knowing who to talk to when following up on a reported problem is important. Always lock windows when stepping away from your computer.

The **Main Window** appears after successful logon. When logging on, the security level setting linked to your User ID and Password will determine which functions are available.



Logging Off: To log out of the CARL.X Staff workstation, use Ctrl+F or go to File > Exit.

MENU OPTIONS

Let's review the different menu options across the top:

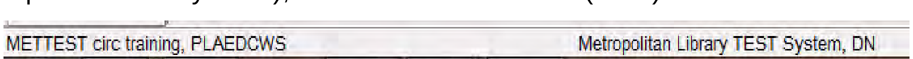
File: Access logon and logoff functions, printer and receipt printer setup, and exiting the application.

Edit: Provides standard editing capabilities: Undo, Cut, Copy, and Paste, Delete, and Select All. The menu also contains the shortcut keys.

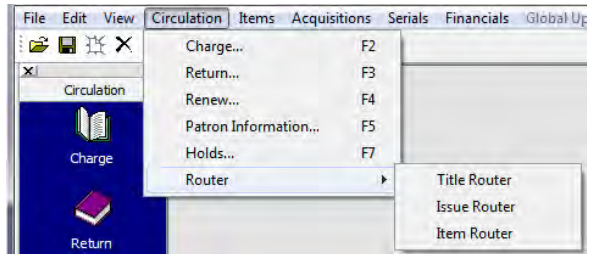
View: Allows you to customize the look of the workstation. From here, toggle off/on the Outlook Toolbar (blue panel on the left to get shortcuts to Circulation, Items Maintenance, etc) and the Status Bar.

The **Outlook Toolbar** is the blue panel on the left of the screen and can be closed by clicking on the X in the upper left corner. The Outlook Toolbar can be opened again by clicking on the X when the toolbar is closed.

The **Status Bar** displays the connection information. This shows the database the user is connected to (in the below example this is 'METTEST'), the user who is logged on ('circ training'), the name of the PC being used ('PLAEDCWS'), the Institution name ('Metropolitan Library TEST'), and the Branch code ('DN').

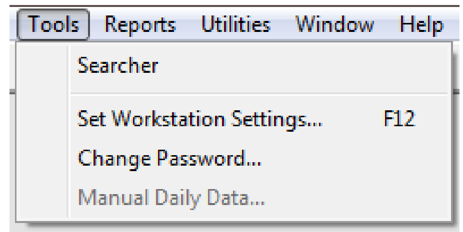


Circulation: Allows navigation to the various circulation modules, which can also be accessed by using a function key (F2, F3, etc.) or by using the Outlook toolbar.



Items: Provides access to Item Information (F6) where detailed information about each item is available.

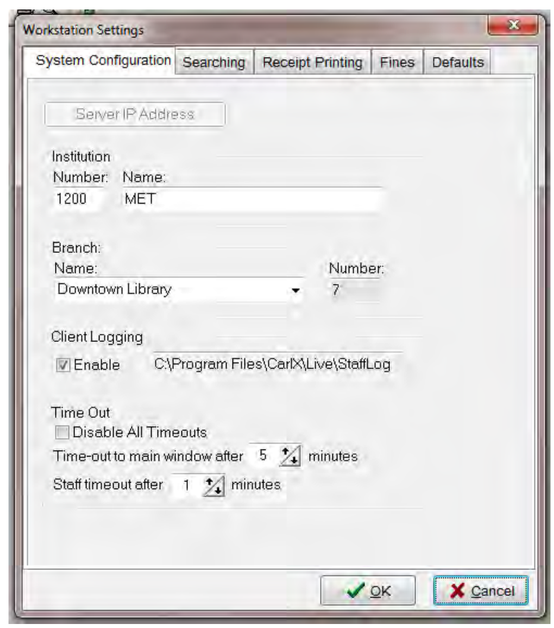
Tools: Navigate to the stand-alone Companion Searcher tool, Set Workstation Settings where defaults and preferences can be set (F12), and the ability to Change Password (for the user currently logged in).



Let's take a closer look at Workstation Settings.

Workstation Settings allow each workstation to be customized for the workflow that makes that computer the most productive. The settings available depend on your permissions.

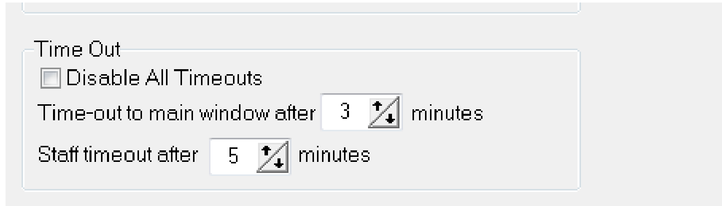
Be aware that changing these settings changes them for everyone who uses this station. Managers at your location can help determine the best settings for your library.



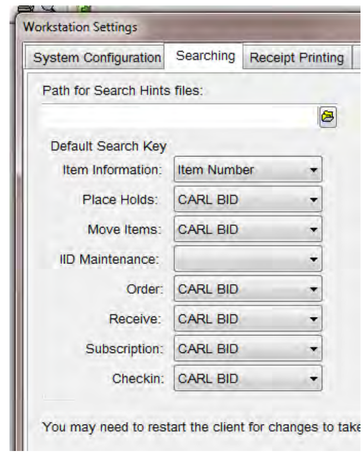
System Configuration:

- Institution, Branch, Client Logging: Shows the institution and branch the client is pointing to, and the location of the error log. If you are experiencing error messages in the client, turning on the error log will log the messages, and this log can be sent to the system administrator for analysis.
- Time Out: The amount of idle time before the workstation closes windows and logs out of the client will be displayed. The Main Window timeout will close all the functions within the staff client.

- NOTE: CARL.X will be closed upon logoff or user switch. However, if the staff member locks their station only, CARL.X will close at the end of the Carl-defined timeouts. The default time out settings will be 3 minutes for main windows and 5 minutes for staff timeout for all staff members.

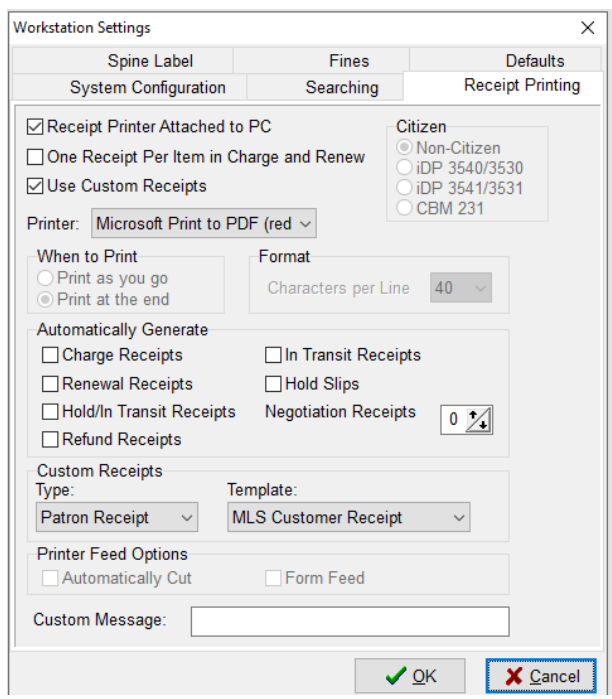


Searching: Sets search defaults. For most frontline staff, the most search keys to set will be Item Information, Place Holds, Checkin.



Receipt Printing: Creates a quick and easy way to set the receipt printer settings that best meet local workflow. **Remember that these settings affect everyone using that workstation.** Managers can help determine the best settings for your location.

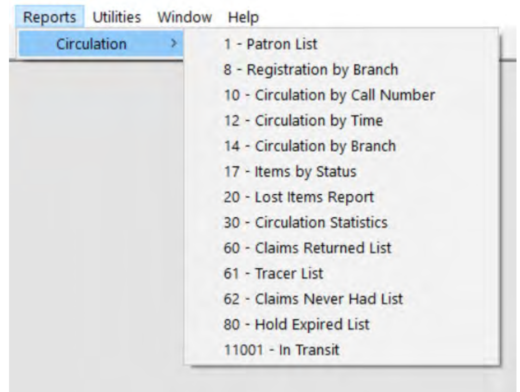
- Selecting "automatically generate" will result in a BRB even though a slip has printed.
- For "custom receipts", frontline staff use "default" or "fold receipt" as the template for the "hold-shelf slip" and "hold/in-transit receipt".
- *Any changes to print settings require staff to log out of CARL and log back in.*



Fines (this is not something that needs to be modified by staff)

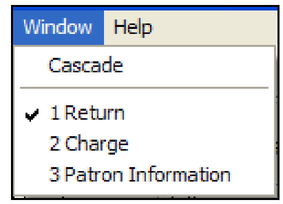
Defaults (this is not something that needs to be modified by staff)

Reports: Provides access to reports. Access to reports will be dependent on each employee's permission level.



Windows: This becomes active when more than one window is open within Circulation. The top portion arranges the various windows in a cascade manner. The bottom portion shows you which windows are open, and the active window has a check mark next to it.

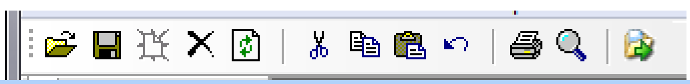
Window Maximums:



- Only 1 each for Charge, Renew, Return, Item Info, and Holds
- 5 Patron Windows allowed

Help: Frontline staff generally will not use this tool. Help is available through the CARL Manual documents or your supervisor.

Tool Bar: Contains the standard Cut, Copy and Paste functionality. The print button will print information displayed in the active window. This does not print a screen shot of the information in the window, so the format will look different on the printed page. The magnifying glass will open Companion Searcher. Help files are accessible from the toolbar as well as information about reports currently running via the yellow and green icon on the end.



CARL.X HOT KEYS AND FUNCTION KEYS

File

Ctrl L – Login

Ctrl F – Log Off

Ctrl R – Print Receipt

Circulation

F2 - CHARGE

F3 – RETURN

F4 – RENEW

F5 – PATRON INFORMATION

F6 – ITEM INFORMATION

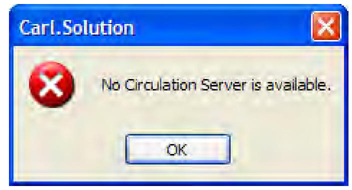
F7 – PLACE HOLD

F12 – WORKSTATION SETTINGS

CARL.X ERROR MESSAGES

Listed are the most common error messages and what to do about them.

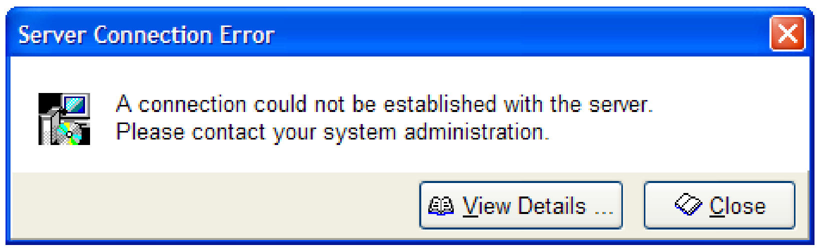
No Server Available



This error will occur if one of the servers CARL.X is attempting to log onto is not available. The server that is not available will be named in the text of the message.

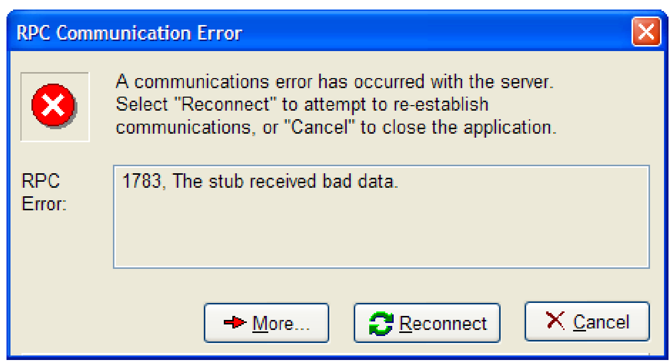
Try to re-launch 2 or 3 times. If you continue to see the error message, report the problem to IT.

Server Connection Error



This error will occur if the PC is unable to communicate with the application server. This is often an indicator of network outages, or that the server address in the configuration of the client is incorrect.

RPC Communication Error

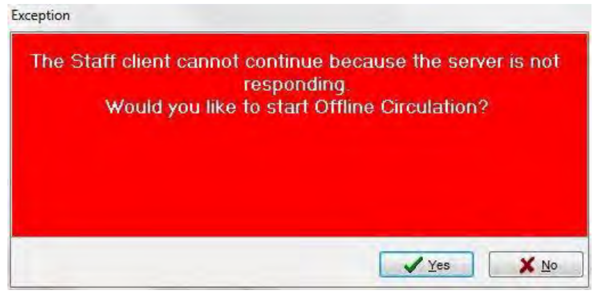


This error message may be seen when launching the Staff Workstation or while working in the client. Click on “Reconnect” to attempt to connect to a different server. If the user is still unable to connect, click “More” for detailed information about the connection problem. Report the problem to the helpdesk, providing them with any RPC Error text.

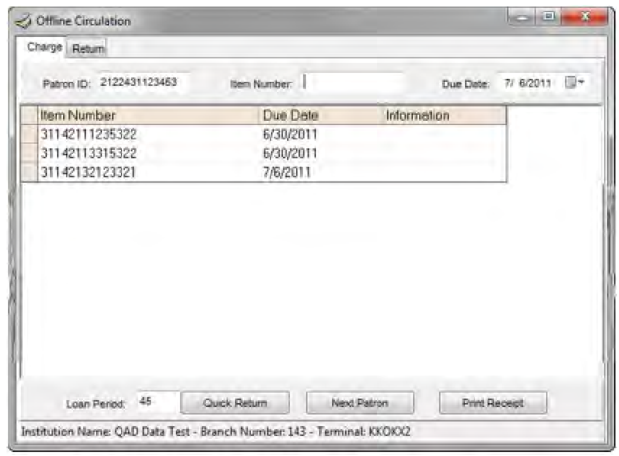
This often appears right before a message displays to work in Offline Circulation.

OFFLINE CIRCULATION

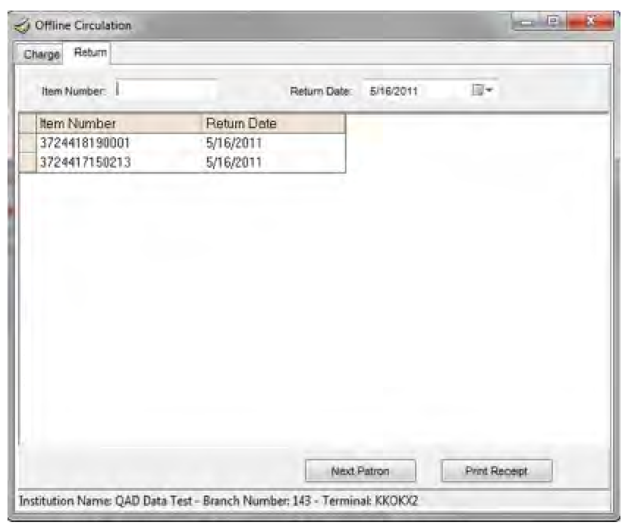
When unable to reconnect to the Circulation Server, the option to launch the Offline Circulation client displays.



The Offline Circulation client will allow staff members to scan a library card and charge items to their account. It will also print a receipt of the transaction. The receipt will only contain item numbers and due dates since it is unable to pull item specific information from the server. ***Staff must manually change the due date in the upper right-hand corner from two weeks to three weeks.***



The offline mode will also allow items to be returned, but they will need to be set aside and re-returned once the server is back up and running as it will not indicate if the item is on hold. Receipts can also be printed for returns when the server is offline. You can change the check-in date in the upper right-hand corner.



During Offline Circulation, CARL.X will continually try and re-connect to the server. Once it has reconnected all the data entered while offline will automatically upload into the program. Depending on how many offline transactions occurred, this could take a couple hours or to the next day.

LIBRARY ACCOUNTS

LIBRARY ACCOUNTS POLICY

To create a new account, staff need to know the individuals' identity, eligibility, and contact information. See the current AL 200: Library Accounts policy for the most up-to-date list of types of accounts. The AL 200.1 Library Accounts Procedure provides guidance on issuing accounts.

The CARL Establishing Eligibility course in MetroU offers an introduction on establishing eligibility.

Review this link for the full list of patron types: Shelving Orientation Location and Media Code Breakdown.

TRANSITIONAL HOUSING

Individuals utilizing transitional housing *may* qualify for a primary library account. Transitional housing organizations that qualify have the following characteristics:

1. The organization provides overnight facilities for sleeping.
2. All residents are expected to stay there on consecutive nights for a long period of time. In other words, they do not stay there only 1 or 2 days a week.
3. The organization tracks who stay at their residence and can provide confirmation of who is staying there. Confirmation can come from a letter, receiving a postcard at that address, from a caseworker, etc.
4. There is a method of notifying the library system that the resident is no longer at that address (returned mail, caseworker notification, etc.).

Here are the current, approved transitional housing locations that meet the requirements:

- Boys Ranch Town: 5100 E 33, Edmond 73103
- Cardinal Community House (DN), 517 SW 2, 73109
- Carver Center (RE) : 400 S May, 73108
- Dunamis House (AL) : 5905 S May, 73119
- Homeless Alliance Long Term Apartments: 1704 NW 4, OKC 73106
- Jesus House : 1335 W Sheridan 73106
- Journey2Healing : 1101 N Fretz, Edmond 73003
- Pivot : 201 NE 50 73105
- Rescue Mission (DN) : 800 W California Ave 73106
- Salvation Army : 1001 N Penn 73107
- Salvation Army Adult Rehabilitation Center: 2041 NW 7, 73106
- Sisu (BI, DN) : 2129 NW 30, 73112
- Speck Homes for Boys:
    - 1425 N Lincoln Blvd 73104
    - 434 NE 14 73104
    - 432 NW 17 73104
    - 7101 Miramar Blvd 73111
- Veteran's Harbor, "Harbor" (BI): 4100 N Newport Ave 73112

Note: These are subject to change at any point they do not meet our characteristics listed above.

To get an organization approved for transitional housing, have your Library Manager contact their Regional Director and the ILS Administrator.

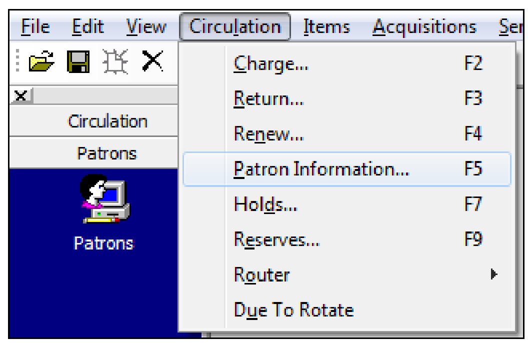
ECARDS

Individuals can apply online for a library account when they live within the MLS Primary or Reciprocal service areas. This process verifies that the individual can be associated with that residential address. ECARD will not work for those who are eligible for School or Annual Fee accounts, or for those who are eligible for Reciprocal accounts based on their school attendance or working in the Pioneer service area. These individuals must come to a library to receive a library account.

Guests may choose to keep their ECARD number or trade it in for a physical library card when they visit a library. To replace the ECARD with a physical account in either CARL.X or CARL.Connect, replace the existing account number with the new library card number and save the account.

Additionally, if guests call the library and speak with a staff member in Central Information Services (CIS), they can do verification over the phone or via email.

CARL.X – SEARCHING AND CREATING A NEW ACCOUNT



Begin by searching for the account. The system requires searching for an account before a new account can be created. Access the Patron Information function by clicking the icon, using the menu, or selecting F5.

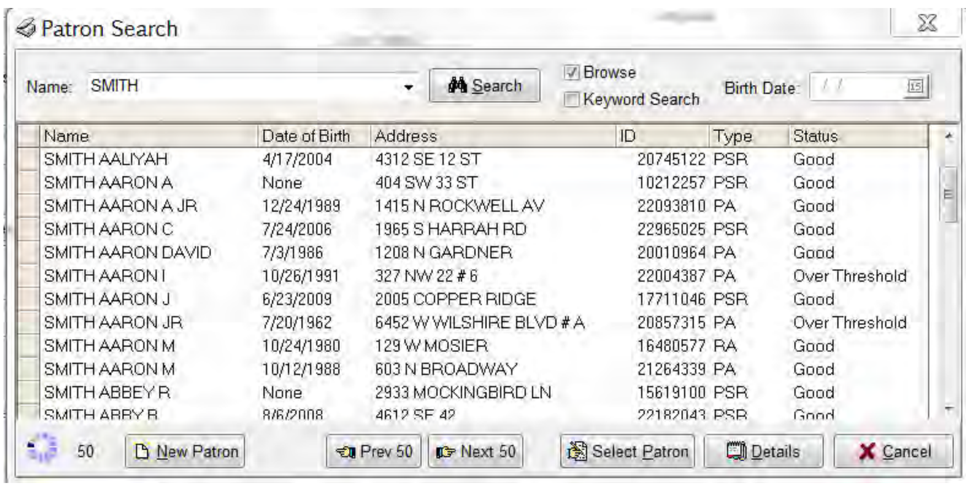
PATRON SEARCHING

When searching for a guest to establish a new account, it is helpful to do both a **Keyword** search as well as a **Browse** search. This prevents creating duplicate accounts.

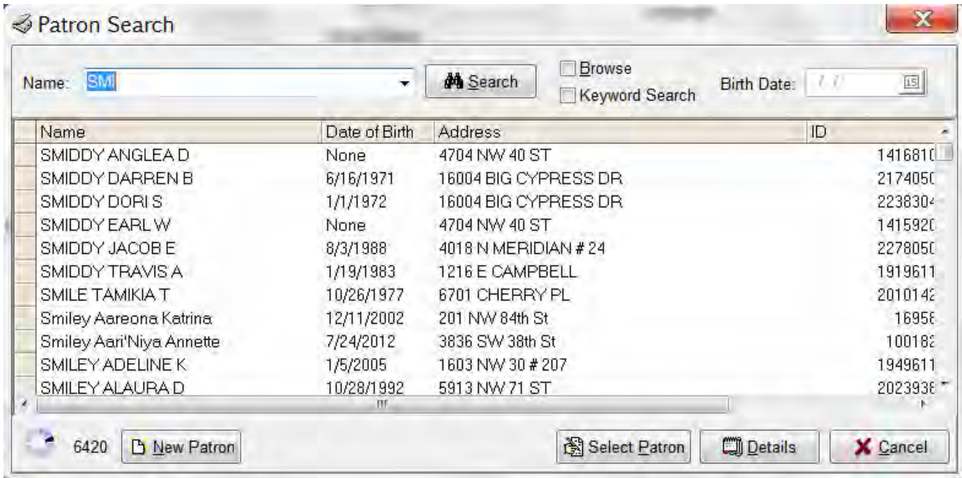
A Patron **Keyword** Search will search the records for the entered terms. All accounts that contain the entered search terms in any indexed field will be displayed in the results screen.

- **Keyword** searches can be combined with searching by **birthdate**.

- A **Phrase** Search can also be used when using a Patron Keyword Search. Enter the search terms in the Name field in quotes. For example, type **"MAIN AVE"** to search for the words MAIN and AVE next to each other in the record. Make sure the Keyword Search box is checked and click Search or select <Enter>. Keyword Search and Phrase Searching can be combined. For example, entering **SMITH "MAIN AVE"** will search for records with SMITH and MAIN AVE.
- Wild cards can be utilized in searching if there may be multiple ways a word is saved in the account. For example, search **"MAIN AVE*"** to find the phrase MAIN AVE or MAIN AVENUE. Wild cards also help search various name spellings; "**JEN***" will give Jen, Jenn, Jenifer, Jennifer, etc.
- A Patron **Browse** Search will display an alphabetical listing of accounts starting with the entered search term. Compare the two different searches for Smith in the screens below. When completing a **Patron Browse**, the Previous and Next buttons will become available, allowing the user to move forwards and backwards in the alphabetical listing.



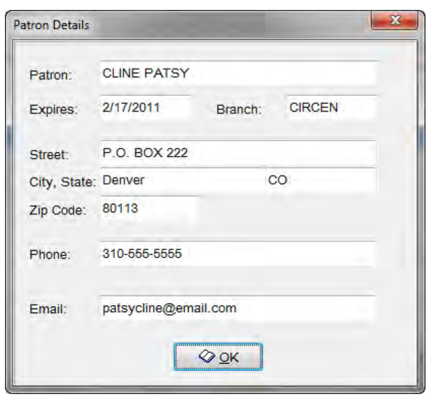
- Complete a "**begins with**" search by un-checking the Browse and Keyword Search boxes. A "begins with" search will look for names that begin with the letters you have entered. Entering **SMI** will display those accounts that have the first three characters of their names that begin with SMI.



Some searching hints include:

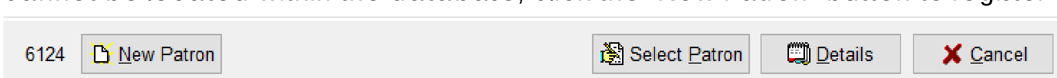
- Leave off the middle initial and any name suffixes
- Look up addresses by leaving off words like Dr, St, Blvd, etc.
- Use a wild card search (e.g. Anders* to get both Anderson and Andersen results).

To find out more detailed information about an account without selecting the record into Charge, highlight the account in the grid and click the  button.



Clicking **OK** on the Details screen will bring back the search result screen.

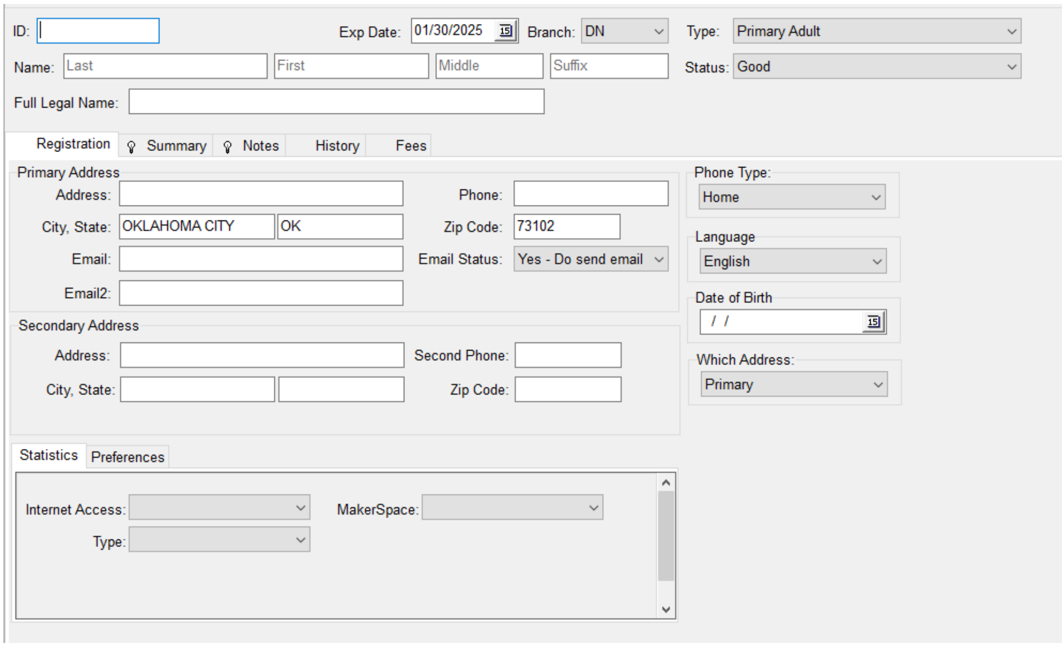
If the account cannot be located within the database, click the 'New Patron' button to register a new account.



NOTE: If a guest has a previous card in the system and it is not caught when you search for them, the accounts can be merged when staff notice multiple accounts.

CREATING A NEW ACCOUNT

After selecting New Patron, the registration screen appears. When all registration information is entered, click the Register button. Here is a look at the full window of the patron record.

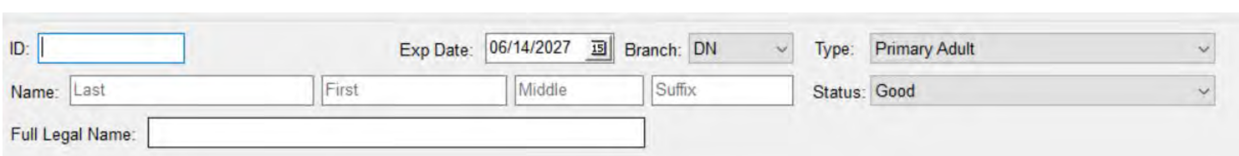


When entering account information:

- Use **ALL CAPs** (for consistency in name sorting when searching for accounts)
- Do not use periods when abbreviating

ONECard accounts are automatically entered as mixed case. ECARDs are entered by guests, so typically do not follow our formatting.

Let's break down each section. More details on account formatting best practices and miscellaneous patron registration situations may be found below.



ID – Scan or type in the library card number.

> **Note:** IDs with ECARD as part of the library card number means the guest signed up on the online ECARD library card application. If a guest already has an existing library account when they sign up for an ECARD, both accounts will be flagged with 'See Notes'.

Expiration Date – Expiration dates are automatically set to expire in three years. If staff change the Type, it will update accordingly based on the selected Type.

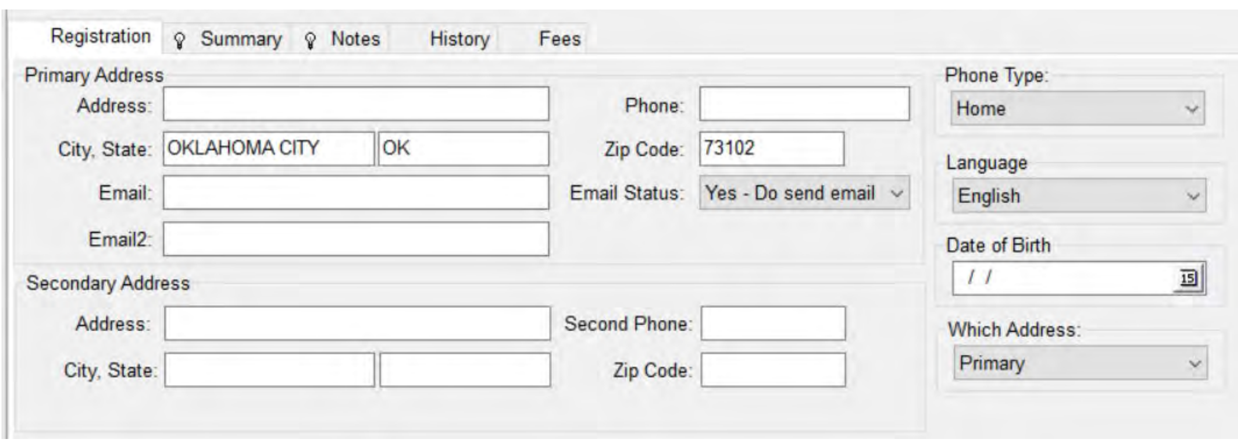
Type – Select the appropriate account type. Library Accounts that staff can issue can be found in the current AL 200 Library Accounts policy.

> **Note:** 'Student Restricted' indicates the child is unable to check out R-rated visual materials.

Status – Indicates the account standing. All new library accounts will be automatically in "Good" status.

Name – The name field consists of four editable fields, which combine to form the searchable name field. The name fields are in Last, First, Middle, and Suffix order. This should be the **preferred** name they go by.

Full Legal Name – This is a searchable field in CARL. The field should only be used if their preferred name is different than their legal name on their Identification. The name on the guest's ID should go into the *Full Legal Name* field with their preferred name in *Name.* This field is searchable, however only the preferred name will show up in the search results. This field should be entered as FIRST MI LAST.



Primary Address – Contains the primary contact information, such as mailing address, city, state, zip code, phone, and email.

> **Note:** Entering the Zip Code will cause the City and State fields to automatically populate. **Be sure to verify the city as some Zip codes may populate with an incorrect city.**
>
> If the account holder wants their mail to go to a different address, staff will change '**Which Address**' to Secondary. See Secondary Address below for more specific information regarding this function.

Phone Type – Phone numbers must include all 10 digits using **dashes**. When entering the Phone Number, select the Phone Type. Selecting Home, Work, or Cell-No Text Message will indicate that this account holder does not receive text message notification for holds. Selecting a carrier from the list of providers indicates the account holder wishes to receive a text message for hold arrival notification and/or Coming Due notifications.

> **NOTE:** Select the phone type before setting SMS notifications. If the phone type is changed, it will clear any SMS notification preferences. Selecting a provider with an MMS designation will send the account holder a Multimedia message. MMS require the phone to be connected to a cellular network, not just Wi-Fi.

Email Address – Enter the email address. Email address information is to be entered in lowercase (as there are some domains that do have their email users set-up to be case-sensitive since most users create their email address in lower case).

Email Status – Select the appropriate notification preferences:

- *Yes – Do send email* – This will automatically enroll the account in email notifications for holds, coming due notices, and overdue notices.
- *Bounced* – When a customer's email returns as undeliverable, there's an automated process that will change the email status to "bounced". When working with an account, be sure to ask the individual if we have the current email on file as it was returned as undeliverable.
- *No – Do not send email* – No email was provided or they do not want to receive email at the provided email address.
- *No – Opted Out* – The account holder has declined to provide an email address and doesn't want to be asked for one again.

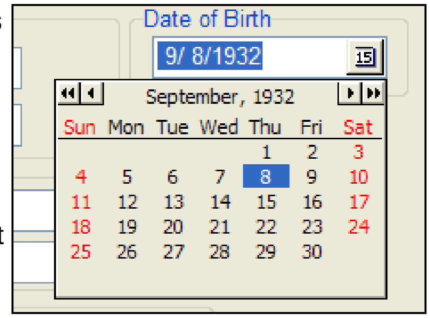
Email2 – Display purposes only. It is searchable. If there is an error in the top *Email* filed or it is blank, it will not default to *Email2* to send notices.

Language – The language preference (English or Spanish) of the account holder can be set in this field. This will determine in which language they will receive email and print notices.

Secondary / Sponsor Address – Contains alternative address information, such as address, city, state, zip code, secondary phone, etc. When you select any of the Student account types, the 'Which Address' field automatically changes to Sponsor.

> **Sponsor Name** – Enter the parent/guardian's name in the Sponsor name field as follows: LAST (comma) FIRST (space) MIDDLE INITIAL (no period) (e.g. TRAINER, IMA U)
>
> If the address for both the student and the parent/guardian is the same only enter the address information in the Sponsor field. The address only needs to be entered in this area since all mail goes to the parent/guardian and not the student unless they want the mail to go to a different address like a PO Box. Then the primary address would go with the student name and the PO Box would go with the parent/guardian name.
>
> If the parent/guardian provides an e-mail and/or cell number, that information will need to be entered in the "Primary Address" part of the registration screen.

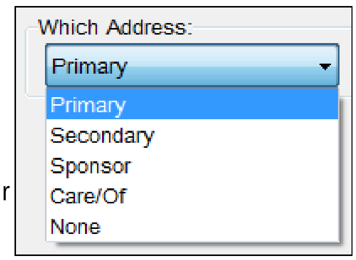
If the parent/guardian has a different address than the student, complete **both** address fields with the corresponding information.



Date of Birth – The date of birth is entered by typing the numbers into the field or by using the calendar feature. The single arrows move backwards and forwards by one month per click. The double arrows move backwards and forwards by one year per click.

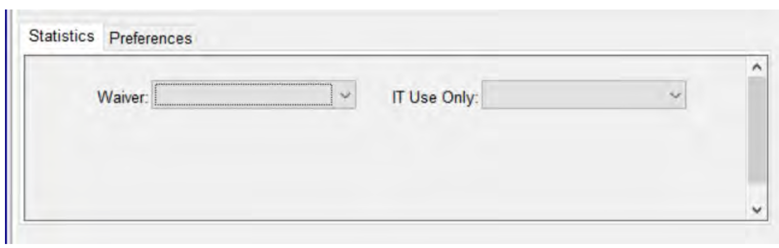
CARL.X has a "Grow Up" feature. When a Child/Student reaches his/her 17th birthday staff will be notified to update the Patron Registration, at which time staff will change the account type to one of the Adult account types. A new card may be issued but it is not necessary. Account holders may keep their old card as a memento if desired.

Which Address – This allows staff to designate which address should be used when contacting the account holder with account notifications. When Sponsor is selected, additional fields will be displayed on the screen that will require information before the Registration screen can be saved. If 'none' is select, NO notifications will be sent. This is not preferred.



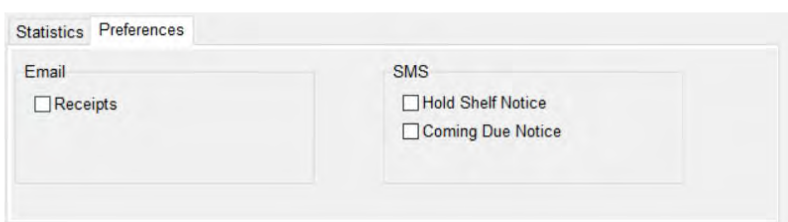
Care/Of – Put the C/O person's name in Address line. For Power of Attorney, use the Care/Of option and add a standard note to the account.

Statistics – Includes dropdown boxes for Waiver and IT Use Only.



- **Waiver** should **only** be used by MLS Studio and Library of Things library staff. There is an entire process on how to use.
- **IT Use Only** should **only** be used by the IT Department. This assist with tracking employees and additional Aspen Discovery access.

Preferences – Includes additional notifications for Email and Text (SMS):



- If Email Status is set to – 'yes, do send email' staff may check 'Email receipts' to receive checkout and renewal notifications.
- If phone carrier is selected, guests can opt in SMS Hold Shelf Notice and SMS Coming Due Notice.

A NOTE ABOUT NOTIFICATIONS

Accounts signed up to receive email notifications will **not** receive paper notifications unless their email bounces. Accounts signed up for text notifications and NOT email notifications will ALSO receive paper notifications because these are considered less reliable methods of communication.

Text notifications are sent using Email to Text services. This requires knowing the cell carrier (who they pay their cell phone bill to). For example, a text notification would be sent to 4051234567@att.net. We have a SMS lookup tool that will provide who the carrier is for any mobile number entered: http://smslookup/.

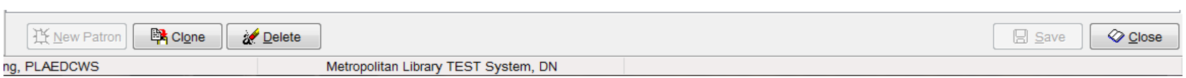
If IT receives a notification a text SMS bounced, they verify the correct carrier is listed for that phone number. If it is correct, they leave it alone. If it's incorrect, they update the carrier. Carrier bounces happen often when there isn't anything wrong other than something with the Carrier's Email-to-SMS gateway and often will bounce one day and work fine the next. An account

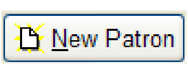
NEW ACCOUNT OPTIONS

When creating a new account, once the information is entered, staff will select Register at the bottom of the screen.

ACCOUNT OPTIONS

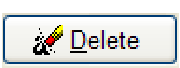
The buttons available on the bottom of the registration tab provide options for actions in the account.



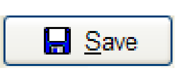


is not used by Metro.

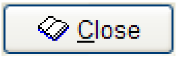
button will open a new Patron Registration screen. Information in the Primary Address, Secondary Address, and email fields will be copied over to the new registration screen. Then enter in barcode, name, and specific information, such as Date of Birth, then Save.



button will delete the account from the database [Only completed by ILS Administrator]. If there are existing transactions (i.e., items checked out, fines, holds, etc.), the account cannot be deleted. All transactions must be cleared before the account can be deleted. Merging is preferable to deleting accounts whenever possible.



button will save any changes made in the Registration screen.



button will close the Patron Information screen. If registration information has changed, and the account has not been saved, the system will prompt to save the changes to the record.

ACCOUNT FORMATTING BEST PRACTICES

When creating a new account, follow these best practices to ensure consistency. It helps us maintain healthy data, which improves searching and customer service. Staff do not edit user entered account information unless it is wrong.

Primary addresses are residential and/or owned property.

ECARD and ONECard do not follow staff conventions. ECARD can catch misspelled streets when verifying addresses, but it does not change the formatting of the address to our conventions.

All accounts need to have a first name, a last name, and a birthdate.

ADDRESSES

Incorrect Examples	Correct Examples
123 S W 5th ST CIR	123 SW 5 CIR
300 S BLVD	300 S BOULEVARD
4617 S SHIELDS BOULEVARD	4617 S SHIELDS BLVD
8125 F WHITE CT	8125 WHITE CT # F
123 D HAPPY ROAD APT 3	123 HAPPY RD # D3
3682 ST PATRICK	3682 SAINT PATRICK DR
2345 NORTHWEST EXPRESSWAY	2345 NW EXPY
9786 N PENNSYLVANIA AVE	9786 N PENN AVE

Numbered Streets

- On numbered streets do not use -th, -rd, -st, etc. like 4th, 3rd, 1st
- Use the suffix for the street if it has one: ST, PL, CIR, TER, etc.

Named Streets

- Always spell out the street name, but you can abbreviate the suffix.
- PENN (Pennsylvania) and NW EXPY (NW Expressway) can be abbreviated

Apartments / Duplexes

- Put # instead of APT then enter the unit number.

PO Boxes

- If an account uses a PO Box as a primary address remember to verify they qualify for the selected account type.
- You may abbreviate PO Box as BX or spell it out as PO Box

Secondary addresses

- This is used when a person lives at one location, but wants their mail delivered at a different location. Generally used for PO Box situations.

Sponsor address

- This is used when the account is a student account.
- Enter the parent name on the Sponsor line. Mail will be addressed to the Sponsor.
- Enter parent/guardian name as: SponsorLast, SponsorFirst, SponsorMiddle
- Do not put a period after the middle initial.

Correctional institution address

- For adults, use as the primary address.
- For students with a parent as guardian, use as the Sponsor address. Enter on the Sponsor line: StudentLast, StudentFirst/ParentLast, ParentFirst. This way we have the sponsor's name, but the student will receive the mail.
- For students with an institution as guardian, use the Sponsor address. Enter on the Sponsor line: StudentLast, StudentFirst/GuardianLast, GuardianFirst

Care/Of address

- This is used for Power of Attorney situations. Add a standard note to note additional details.
- Enter the c/o person's name in the Secondary Address field, NOT an address.
    - Their mail will be addressed: PrimaryLast PrimaryFirst C/O COLast, COFirst

Address Confidentiality Program

- Participants will have a card they show that includes their name, ACP number, and expiration date.
- The reason for entering the ACP number by the name is that the mailing address for all ACP eligible people is the same. Their card will provide the PO Box that the mail is delivered to. Then, once the Post Office delivers the mail to that PO Box, the ACP organization uses the number and name combination to get the mail to the right people. Enter the PO Box just like any other address for a Primary account using the Primary address field. The secondary address is not required because there is no street address to be entered in this situation.
- Including the number by the name indicates that this is an ACP customer and that having a PO Box as a primary address is fine.
- Adult account
    - List the ACP number to the Middle Initial (SMITH, JOHN T-1324)
- Student account

    - On Sponsor line, list the ACP number as the Sponsor's middle initial (SMITH, JANE A-1324)
- Set expiration date to match the expiration on the ACP card.

PHONE NUMBERS

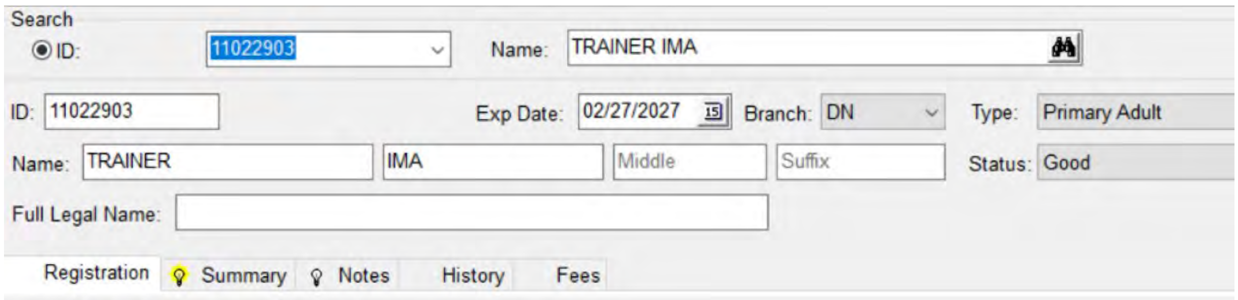
- Phone numbers must include all 10 digits
- There must be division between the area code, the prefix, and the last 4 using dashes
- 405-606-3779 is the correct format

MISC. PATRON REGISTRATION SITUATIONS:

- **Emancipated Minors** – Make the card a 'Primary Student' card, change 'Which address' to 'Primary.' Fill out the required information. In the Secondary Address line put Emancipated.
- **School Accounts** – Must be re-issued each year based on continued eligibility. Set card expiration at one year.
- **Special Stop** – When an account resolves a Special Stop status issue contact the ILS Administrator or your Library Manager (ban) to be removed. DO NOT delete any notes from the account.
- **No Primary Address Listed** – In the rare instance an account holder is adamant they do not want their address listed on the account, we will follow these conventions:
    - If they have a PO Box, we will list that as their primary address and in the secondary address field staff will enter "physical address verified staff initials/location". "Which address" should be set to Primary.
    - If they do not have a PO Box, in the primary address field staff will enter "physical address verified staff initials/location" and change the "Which address" to none.
        - By doing this, they will not receive any notifications.
- **School Visits and Library Cards** – We should not be issuing library accounts without parental authorization. For school visits, teachers need to coordinate with library staff to get library card applications. The school can send home library card applications and if the parent is okay with us issuing them a card, the parent needs to return the completed form to the school. Once the school has a completed library card application, they can give those to the library for us to issue cards.
    - Since most school visits have students that reside within our service area, they will receive a Primary account. However, for districts that may have students that live outside our service area, those students should be issued a School account.

PATRON INFORMATION TABS

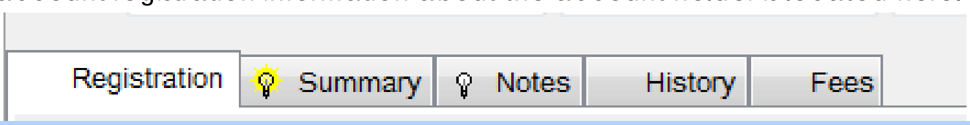
When a record is selected from the search results, the complete details of the record will be loaded into the Patron Information function. The top portion of the Patron Information screen (above the tabs) displays primary account information. This information can be changed while in any tab of the Patron Information function.



Let's look at each Tab.

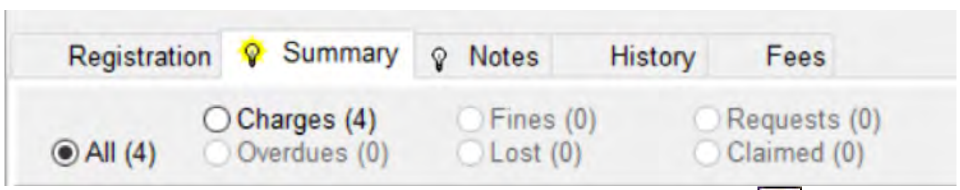
REGISTRATION

Detailed account registration information about the account holder is located here.



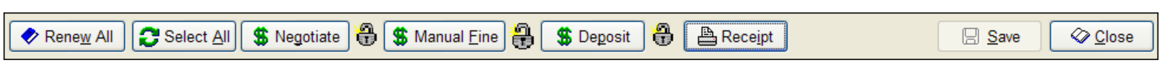
SUMMARY

The Summary tab provides information on any active transaction against the account record. The All button displays all transactions and fines. Note that the number in parentheses after each radio button shows a running tally for each transaction or fine.



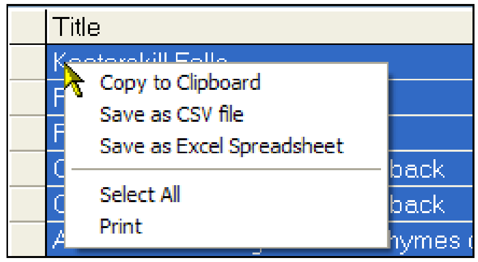
- If there are current transactions on the account, the light bulb icon is lit.
- If the icon is not lit, then there are no transactions on the account.

Based on the radio button selected, the tool bar at the bottom may display different options.



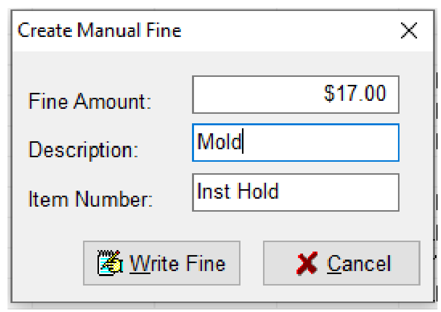
- Renew All
    - Clicking **Renew All** will go through the Renewal Process for all items checked out to the account. If the renewal is successful, the item's due date will be updated, and the renewal count for the item is incremented. If the renewal failed, a Big Red Box will be displayed explaining the reason for the failure. A Renewal Receipt will be printed.
    - We prefer not to renew material for account holders. We have an auto-renewal process that will renew material 3 days before the item is due. If the account holder mentions being unable to meet that due date, we may renew their material. Otherwise, we want to encourage them to use the auto-renewal process that occurs automatically.
- Select All

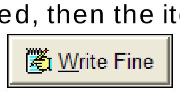
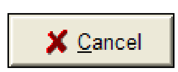
- o After clicking the **Select All** button, right-clicking on the grid will show the following options (functionality may depend on whether MS Office is on that device):



  - ▪ ***Copy to Clipboard*** –copies the information in the grid to paste the information to a new document.
  - ▪ ***Save as CSV file*** – saves the grid as a comma delimited file.
  - ▪ ***Save as Excel spreadsheet*** – saves the grid as an Excel spreadsheet.
  - ▪ ***Select All*** – if the list is not highlighted, Select All highlights the entire grid.
  - ▪ ***Print*** – prints the information in the grid.

- Negotiate
  - o The **Negotiate** button navigates into the Negotiate function. This is where fines and fees owed by the account are cancelled or waived. Never PAY fines in CARL.X.
- Manual Fine
  - o **Manual Fine** will manually add a fee to the record. For example, if an individual damages an item or returns an item missing a piece, we add a manual fine for the replacement cost. Every fine has an item # starting with 1200__(MLS's unique CARL #), which counts up from 1. This number can be found in Transaction File available to Admins.
  - o After clicking Manual Fine, enter the dollar amount, including cents, into the Fine Amount box. Enter the reason for the fine in the Description box (16 characters maximum). If entering a Manual Fine in relation to a specific item (e.g. damaged item), enter the Item Number. *The Item Number is not a required field when creating a Manual Fine*. If an item is highlighted when the Manual Fine button is clicked, then the item number will be filled in automatically.



  - o Click  to save the fine to the record. The fine can now be paid through the Smart Money Manager (Point of Sale) software. Click  to close the Create Manual Fine window without creating the fine.
- Deposit Balance: This is not used by MLS
- Receipt

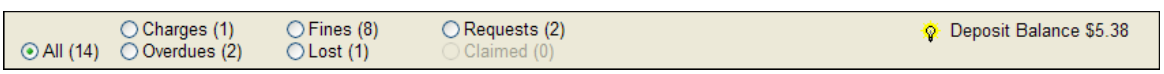
- o After clicking the **Receipt** button, the Patron Receipt Options menu will display. Select the desired options to print by checking or un-checking the boxes next to each transaction type. Click **OK** to print a receipt from an attached receipt printer. Clicking **Cancel** will not print a receipt and the Patron Information screen will return. If an account holder only wants a list of items that are currently checked out on their card a shorter receipt can be printed from the RENEW screen.

- Save
  - o If changes are made to the Patron Registration information that is available at the top of the screen, the **Save** button will be enabled. Clicking this button will save the changes to the account. If the user tries to close the account without saving, it will prompt to save the changes.
- Close
  - o Selecting **Close** will close the Patron Information window. If the Registration Information has changed without being saved, it will prompt to save the changes on the account.

SUMMARY – RADIO BUTTONS

ALL RADIO BUTTON

This option displays all active transactions on a record. The Status column describes what type of transaction is listed.

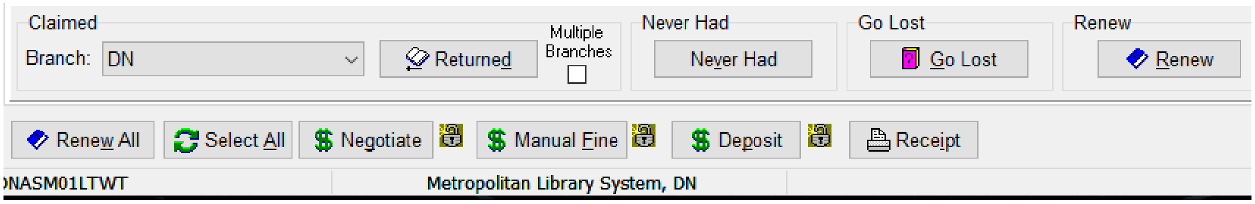


CHARGES RADIO BUTTON:

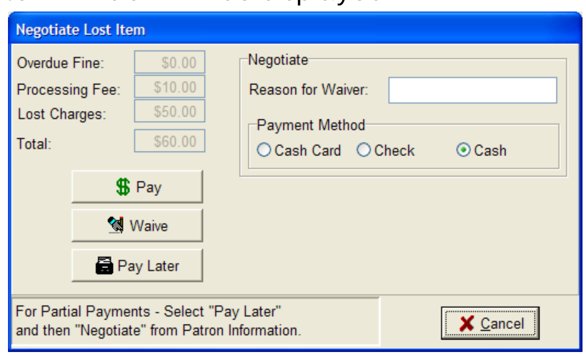
This option displays only the items in Charged status. This does not include Overdue or Lost items. This view shows the date the item was charged, when it is due, and from where the item was checked out. The Status column will list if an item is Charged.

Title	Call Number	Item Number	Status	Due/NNA	Fines	Fees	Branch	Location	Media
The Green and the Gray		31730000012837	Charged	11/15/2006			YCIRC	YCIRC	YCRC
The green eyed marriage surviving		31730000012835	Charged	11/15/2006			YCIRC	YCIRC	YCRC
Cartoon festival The cat came bacl	JVHS CAR66	31730000012834	Lost	11/8/2006		$11.00	NORTH	YCIRC	YCRC
Cartoon festival The cat came bacl	LATIN JVHS C/	31730000014184	Brw. Fee	10/11/2006	0.01		WEST	YCIRC	YCRC
Home and beyond an anthology ol		Inst Hold	Hold In Queu	10/12/2005					

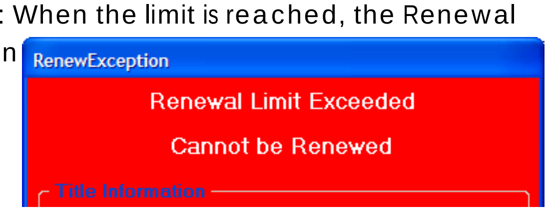
When the **Charge** radio button is selected, additional buttons will be available. The buttons are used to act on individual titles listed within the radio button.



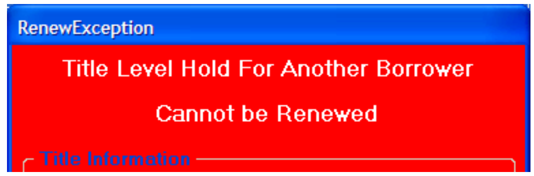
- Charges – Claim Options
    - Claims Returned is not used by MLS
    - Claims Never Had
        - See Claims Never Had for more information about that function.
    - Go Lost
        - If an account holder is ready to pay for a lost item before the item is declared Lost by the system, highlight the item and click **Go Lost**. This will place the item into Lost status and assess the cost of the item to the account. The Negotiate Lost Item window will be displayed.
        - Always select **Pay Later** to post the cost associated with the item to the account. The cost of the item will be available for future payment, but it will block the card as a 'Lost' item is a blocking threshold. Payments are made in the Point of Sale software.



-
    - Renew
        - This option allows for the renewal of individual items, without printing a receipt. To renew an item, highlight the item in the grid and click the **Renew button**. A renew attempt will be made. If the renewal is successful, the item's due date will be updated, and the renewal counter of the item will be incremented. If the renewal failed, a failure Big Red Box will be
        - displayed with the failure reason.
        - We want to encourage accounts to use the auto-renewal process instead of staff renewing material in CARL.
        - Renewal Exceptions
            - **Renewal Limit Exceeded**: When the limit is reached, the Renewal Limit Exceeded exception box will display. The only option is to **Deny Renewal**.



- **Title Level Hold for Another Borrower:** Accounts may renew items if there is an equal number of on shelf items and items on the holds list. If there is not an equal number on shelf, the following BRB will display. The only option is to **Deny Renewal**.



- **Overdue/Lost Items:** Items that have gone Lost are prevented from being renewed. Overdue items can be renewed up to 59 days past due. The only option for these items is to **Deny Renewal**.

OVERDUES RADIO BUTTON

This option displays information on items that are in an Overdue status, including the Overdue Fine that would be assessed if the item were returned or renewed today for items that still accrue fines. Additional buttons are available when the Overdues radio button is selected. These options are the same that are available in the Charge section above: Claimed Returned/Never Had, Go Lost, and Renew. Claims Returned is no longer used by MLS.

Title	Call Number	Item Number	Status	Due/NNA/Posted	Fines	Fees	Transaction Branch	Item Branch	Location	Media
Oklahoma bandscapes : wind music o	CLASSICAL MAG CO	M06451209	Overdue	5/26/2021	$0.00		DN	ED	M	CD
Experience pass : OKCMOA.	PASS OKCMOA 01	M12721826	Overdue	5/26/2021	$6.00		DN	WR	PASS	PASS
Oklahoma bird life,	598.09766 B348o	65918032	Overdue	5/26/2021	$0.00		DN	DN	ANF	BK
MLS Sprint MiFi 8000 hotspot.	HOTSPOT 2019	M12780806	Overdue	5/26/2021	$3.00		DN	CT	HOT	MOB
ILL material 0120	Late Shakespeare, 1	ILL0163095223	Overdue	5/26/2021	$6.50		DN	ILL	ILL	BK

FINES RADIO BUTTON

This option displays information about fines and fees that the account owes. Included in the grid is the Assessed Date, the amount that was originally owed, any partial payments made against the fee, the alias of the staff member that was logged in when the fine was assessed, and the

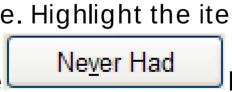
Title	Call Number	Item Number	Status	Assessed Date	Fines Total	Fines Paid	Notes	ID	Transaction Branch	Item Branch	Location	Media
Experience pass : OKCMOA.	PASS OKCMOA 01	M12721826	Fine	6/8/2021	$6.00	$0.00		ta0	DN	WR		
MLS Sprint MiFi 8000 hotspot	HOTSPOT 2019	M12780806	Fine	6/8/2021	$3.00	$0.00		ta0	DN	CT		
ILL material 0120	Late Shakespeare. 1	ILL0163095223	Fine	6/8/2021	$6.50	$0.00		ta0	DN	ILL		
Oklahoma bandscapes : wind music o	CLASSICAL MAG CO	M06451209	Manual Fin	6/8/2021 11:38:51 AM	$5.00	$0.00	Missing Dis	ta0	DN	ED		

branch where the fine was assessed.

LOST RADIO BUTTON

This option displays information on items that are in Lost status (items that have been checked out and overdue for 60 days or more). The Fee Total column lists the Lost fee amount that is owed for the item.

Title	Call Number	Item Number	Status	Charge Date	Due Date	Fee Total	Branch	Location	Media
Mr. Brown can moo! Can you?	READER SEU	M03332853	Lost	10/17/2019 11:29:00 AM	11/18/2019	$14.00	DN	R	BK
Lexi's clean kitchen : 150 delicious Pal	641.5638 D2521I	M04261464	Lost	10/22/2019 4:07:59 PM	10/30/2019	$34.95	DN	ANF	PBK
Noel Street /	FICTION EVA	A00000117	Lost	11/18/2019 8:48:36 AM	12/9/2019	$21.99	DN	F	BK

When the Lost radio button is selected, the option to mark the item Claims Never Had is available. Highlight the item they say they never checked out (or have already returned) and click the 

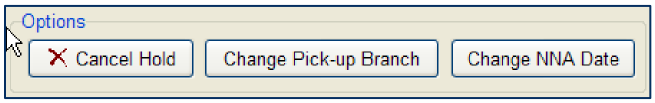
button. The transaction will be logged in the Claimed History tab and the item will remain with a Lost holding status so that staff and guests know it is not available. The Claims Never Had information is available in Item Detail. Staff should never Claim an ILL item.

REQUESTS RADIO BUTTON

This option displays information about account holds. It includes the title, NNA or Suspend until date, status (Hold Shelf, Hold In Queue, Hold In Transit, etc.), place in the Hold Queue, and Pickup Branch. To see an account's queue position, this radio button must be selected.

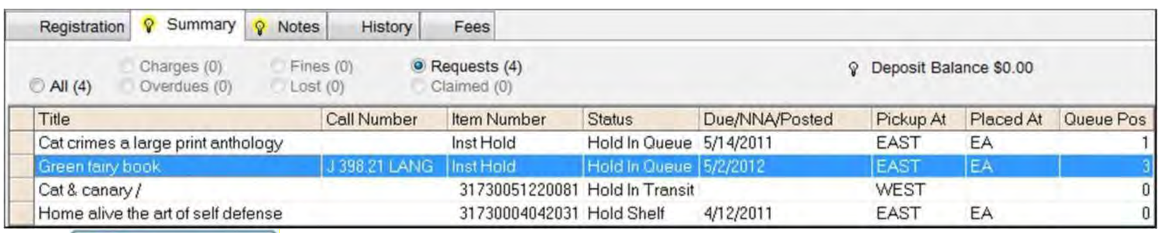
Title	Call Number	Identifier	Status	Due/NNA/Posted	Pickup At	Placed At	Queue Pos
Cat poems.	J811 C9111c TWEEN	BID: 32700	Hold In Que	7/18/2020	DN	VRTL	1
Fox in socks.	READER SEU	Item ID: 82139695	Hold Shelf	2/16/2019	DN	DN	0

When the Requests radio button is selected, the following buttons become available.

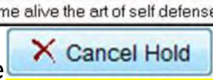


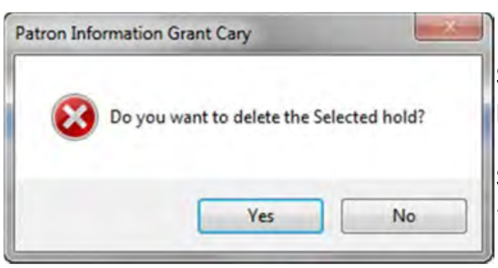
Requests – Cancel Hold

To cancel a Hold for an account, click on the Requests radio button and highlight the hold that is to be removed.



Title	Call Number	Item Number	Status	Due/NNA/Posted	Pickup At	Placed At	Queue Pos
Cat crimes a large print anthology		Inst Hold	Hold In Queue	5/14/2011	EAST	EA	1
Green fairy book	J 398.21 LANG	Inst Hold	Hold In Queue	5/2/2012	EAST	EA	3
Cat & canary /		31730051220081	Hold In Transit		WEST		0
Home alive the art of self defense		31730004042031	Hold Shelf	4/12/2011	EAST	EA	0

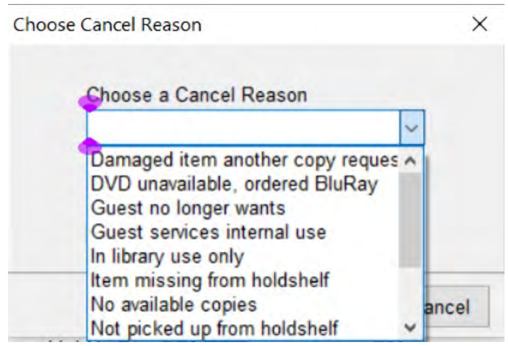
Click the  button to initiate the deletion against the selected hold. A confirmation window will display.

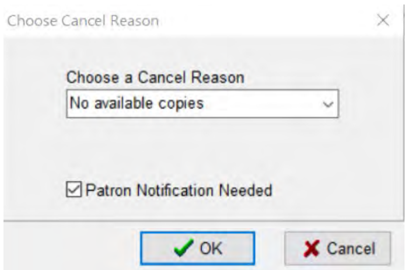


Selecting **No** will close the confirmation box and return to Patron Information. The hold will not be deleted.

Selecting **Yes** will bring up the Choose Cancel Reason window with a dropdown menu.

Choose any preset hold cancellation reason.





If a notification of the cancellation is needed, ensure the Patron Notification Needed box is checked. It is default the box is unchecked as we prefer to only cancel holds per guest request.

Clicking **Cancel** will close the Choose Cancel Reason window and go back to the Patron Information screen and the hold will not have been cancelled.

Clicking **OK** will return the Patron Information screen, and the hold will have been removed.

To delete a Hold that is already in Transit or on the Hold Shelf for an account, go through the steps listed above. After choosing a cancel reason and clicking **OK**, a Big Red Box – Hold Cancel Exception will come up. There are 4 options to choose from: Cancel and Place First in Queue, Cancel Hold, Cancel and Trigger next hold, and Do Not Cancel Hold.

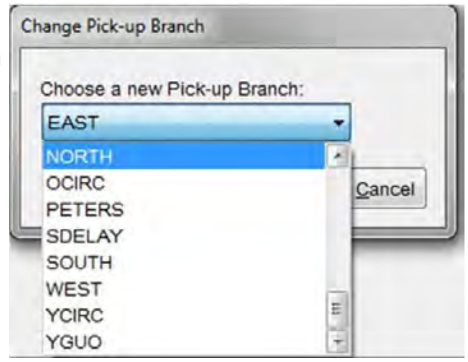
Cancel and Place First in Queue – Will cancel the existing hold for the account and place them first in the Hold Queue for that title. The item status will change to 'On Shelf' (it will be 'on shelf' whether the location is the owning location or not) and the item will be removed from the account. In Patron Information, there will be a new request where the account is first in the queue, and the pick-up branch will be the same as what the original hold pickup branch was.

Cancel Hold – Cancels the existing hold for the individual, removing it from their account. The status of the item will change to 'In Transit' if not the owning location or to an 'On Shelf' status if the owning location. If there is an existing hold queue associated with the item or an Item Level hold for the item, it will not be triggered.

Cancel and Trigger next hold – Cancels the existing hold for the account and triggers the next hold in queue or item level hold. Only use this option if the item is in hand.

Do Not Cancel Hold – Does not cancel the hold and returns to the Patron Information screen. The hold stays on the account.

Requests – Change the Pick-Up Branch



In the Patron Information screen under the requests radio button, the pick-up branch of a 'Hold In Queue' or a 'Hold In Transit' request can be changed. Highlight the request to change and click the

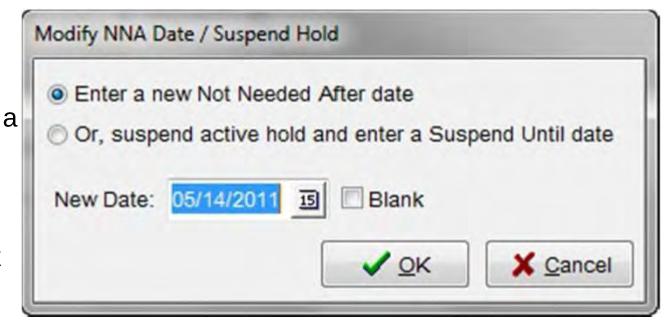
button.

Select the new Pick-up Branch from the dropdown list and click OK. The new Pick-up Branch will be displayed in the Pickup At column in Patron Information.

Requests – Modify the NNA Date

If a Hold has passed the NNA (Not Needed After) Date, it will fall off the Hold Queue. To extend the NNA date of a hold, highlight the Hold to be extended and click the

button. Select the 'Enter a new Not Needed After date' radio button.

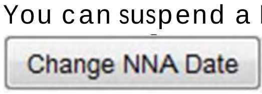


Enter the new Not Needed After date in the field or select a date from the calendar. Click OK.

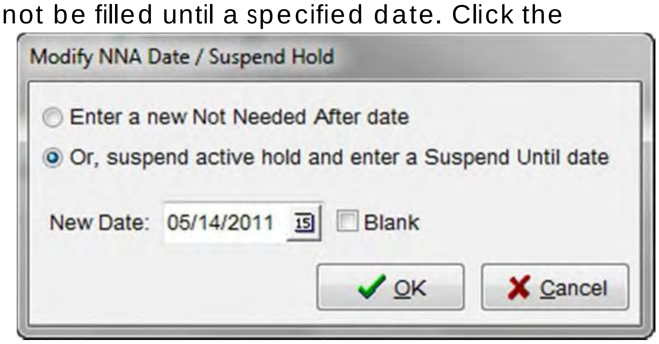
DO NOT select the Blank checkbox as this will allow the Hold to remain in the Hold Queue without a NNA date.

Requests – Suspend a Hold

You can suspend a Hold so that a request will not be filled until a specified date. Click the



button.



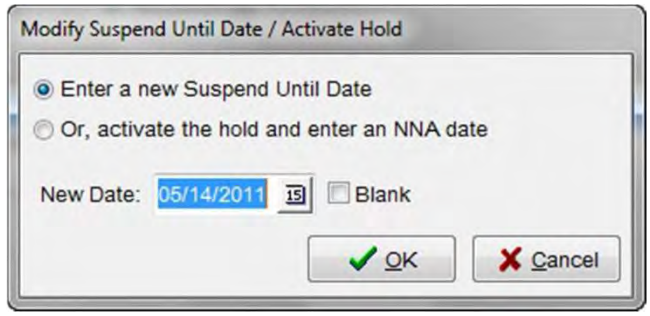
Select the 'Or, suspend active hold and enter a Suspend Until date' radio button.

Enter the date that the Hold should be suspended until and click **OK**. The hold will be skipped over in the hold queue until the Suspend Until date is passed, or until the Hold is reactivated by a staff member.

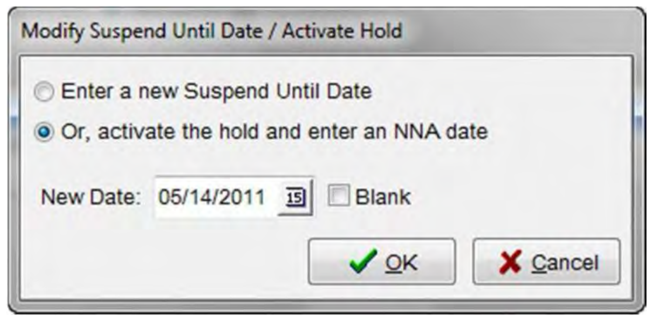
Request – Modify a Suspended Hold

Highlight the suspended hold and click the 

button. You can change the Suspend Until date by selecting 'Enter a new Suspend Until Date' and entering a new date. Click **OK** to update the hold with the new date.



To reactive a suspended hold, select the 'Or, activate the hold and enter an NNA date' radio button and enter a date into the date field. Click **OK** to change the hold status to Hold in Queue.



CLAIMED RADIO BUTTON

This option displays the items that have been Claims Returned for this account. Since MLS is not using this function, nothing should ever be displayed here.

NOTES

The Notes tab is used to communicate information about an account to staff who are working on the account. The notes can be system generated (e.g., when they sign up for an ECARD but already have a card in the system); however, most notes have been placed by staff to share information about an account with other staff members (e.g. a payment plan for fines has been set up). The light bulb icon will light up when notes are on the account. Click on the Notes tab to view the notes.

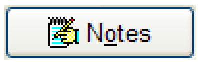
MLS expectation of use

- While these notes are not guest facing, staff must write them as though the guest or a supervisor could see it.
- It is important delete outdated notes. Access staff, librarians and managers may add or delete notes.
- Urgent Notes regarding system bans may only be removed by the Library Manager or ILS Administrator.

Utilizing 'See Notes'

Setting a status of 'See Notes' blocks accounts from using self-checks. Use this when it is ESSENTIAL to draw attention to the notes for an account. Be sure to remove the status and the associated note as soon as possible. If you place an "Urgent" note on the account, it will block the account in CARL.X so staff cannot override the note to check out to the account. Therefore, if you place an "Urgent" note on the account, you will want to change the status to "See Notes" as well.

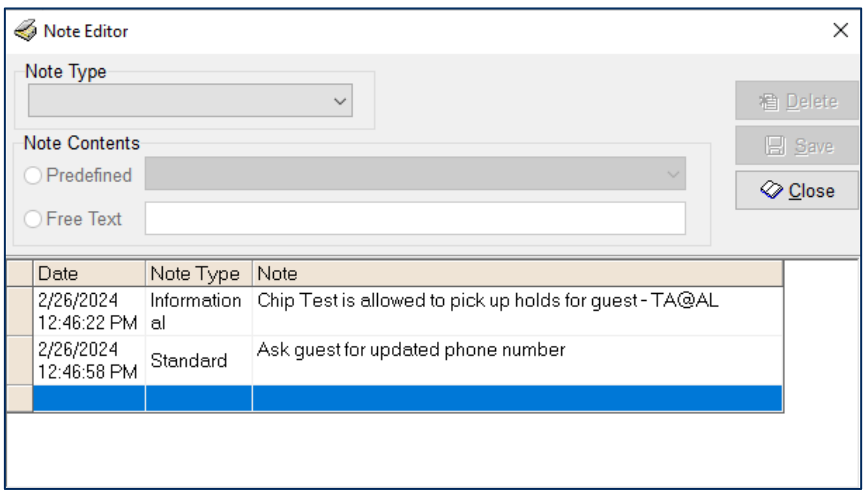
How to Add a Note

At the Notes screen, click on the 

button and the Notes Editor window will display. Double click on the grid where the notes are displayed to open the Notes Editor window.

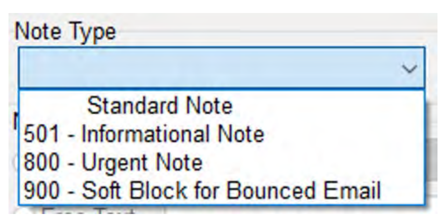
The cursor will default in the Note Type field. Most notes entered by staff are Standard Notes. To change the Note Type, click on the down arrow next to the **Note Type** field. Staff will have the option to select standard, information, or urgent note type.

A best practice for entering notes in CARL is to include your initials and branch.



STANDARD NOTE

There are no system or client actions with this note type. This note will display in the Notes tab for informational purposes. For example, noting missing pieces, damaged material, a request to show ID prior to checkout, or Power of Attorney situations.



Standard Note will be selected, and the cursor will be placed in the Free Text field to enter the note text.

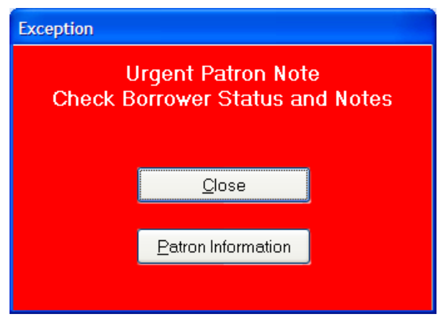
INFORMATIONAL NOTE

When we want to alert staff to a note on an account, but do not want to use a See Notes status, we can use an Informational Note. The informational note BRB will only populate in Charge / Check Out.

We will use an informational note to identify payment plan details, and when someone other than the account holder is able to pick up holds on an account, and potential quick issues to alert to staff with holds held behind the desk long-term. Additionally, we would use informational notes for:

- consistent issues with material being returned in poor condition and the account holder says the damage was like that,
- identifying accounts consistently over 100 limits where we need to check in previous material before checkout,
- clearly stating we need to do shelf-checks before marking items Claims Never Had,
- noting we should not waive fines.

800 – URGENT NOTE



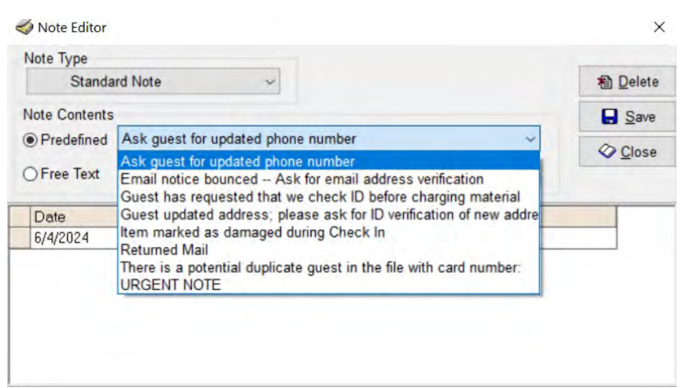
An Urgent Note forces client actions. If an Urgent Note is on an account, the Urgent Note Big Red Box will be displayed. It will not allow staff to check out until the note is resolved.

Urgent Notes are used to notify staff of accounts with a system ban, a lost/stolen library card, a Lost Item/card held at a library, returned mail, or other urgent matters.

900 – SOFT BLOCK FOR BOUNCED EMAIL

When an email returns as undeliverable, the email status is set to "bounced" and a Soft Block for Bounced Email BRB will display. The account is also set to See Notes. When working with an account, be sure to ask the account holder if we have the current email on file as it was returned as undeliverable.

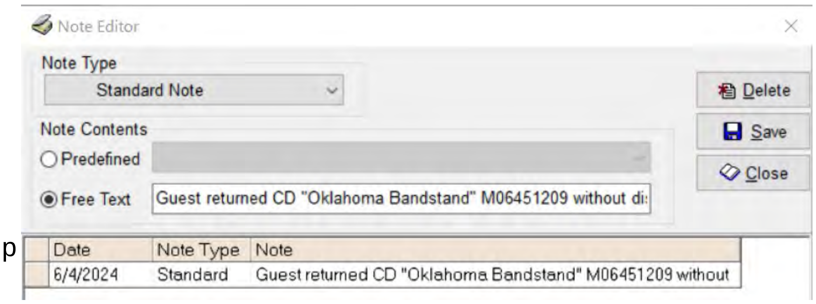
Predefined Notes



To add a Predefined note to an account, click on the Predefined radio button and then click on the dropdown list box to select a note from the list. Click **Save** to add the note to the record.

Free Text Notes

To add a Free Text note, click on the Free Text radio button and enter a note in the adjacent field. Free Text notes can be up to 500 characters long. Any note that is longer than the display in the Patron Information screen will wrap to the next line in the screen.



Include the two-digit library location in the note to assist other staff if there are questions regarding the note. The date is added automatically and displayed in Patron Information. If a note is modified later, the original timestamp on the note does not change.

Click **Save** to add the note to the record.

To add another note, repeat the above steps. When there are no more notes to be added, click Close.

NOTES CHART

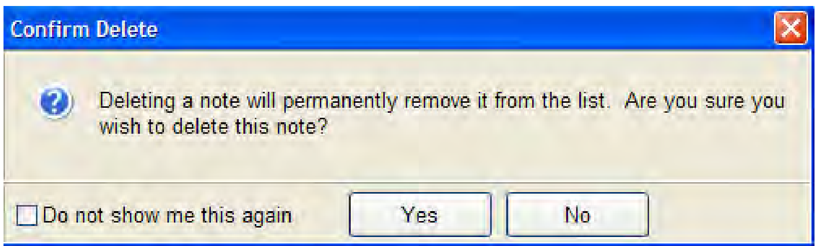
Here is a chart to help staff know when to use the different note types and if the status needs to be updated to “See Notes”:

CARL Note Language	**Note Type**	**See Notes Status?**
Ask guest for updated phone number	Standard	Yes
Email notice bounced – ask for email address verification	System Generated	Yes
Guest has requested that we check ID before charging material	Informational	Yes
Guest updated address; please ask for ID verification of new address	System Generated	Yes
Item marked as damaged during Check In	System Generated	No
Returned Mail	Urgent	Yes
There is a potential duplicate guest in the file with card number:	System Generated	Yes
URGENT NOTE	Default Selection	No
Free Text – Payment Plan	Informational	No
Free Text – Local Suspension	Informational	No

Free Text – Approval for another guest to pick up holds	Informational	No
Free Text – Local issues where we do not want to prevent guest from using self-checks	Informational	No

How to Delete a Note

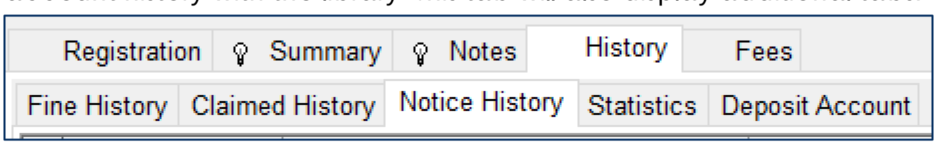
1. At the Notes window, double-click on the grid where the notes are displayed, or click the Notes Editor button.
2. Highlight the note to be deleted, then click the **Delete** button. The system will prompt the user to confirm the note should be deleted.



3. If you are deleting multiple notes, check the “Do not show me this again” checkbox. The confirmation will not display for the remainder of the notes being deleted in this session of the Notes Editor.
4. Click the Yes button and then click **Close** to exit the window. Once the Note window is closed, the note will be deleted.

HISTORY

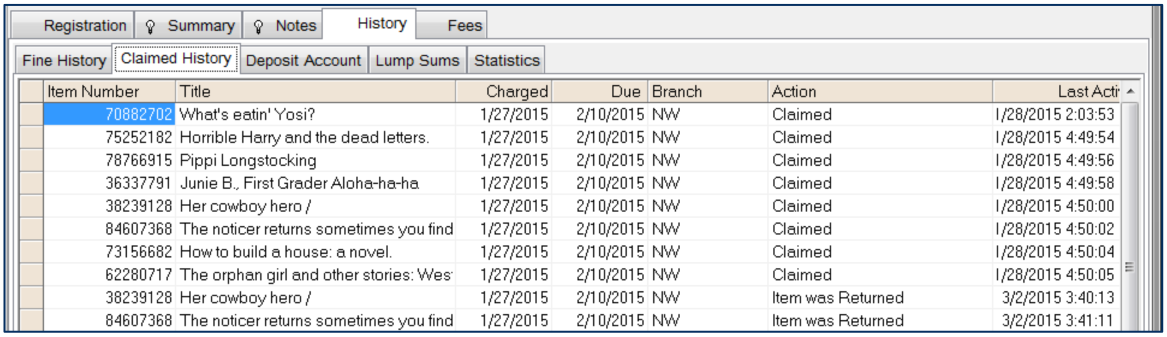
Displays the account history with the library. This tab will also display additional tabs:



The **Fine History** tab will list all fines and fees the account has owed in the past, dates they were paid or cancelled, and when lost materials were returned or paid. Fines that have been resolved via payment, waiver, or cancelling will remain on an account for 6 months. Unresolved fines will remain indefinitely.

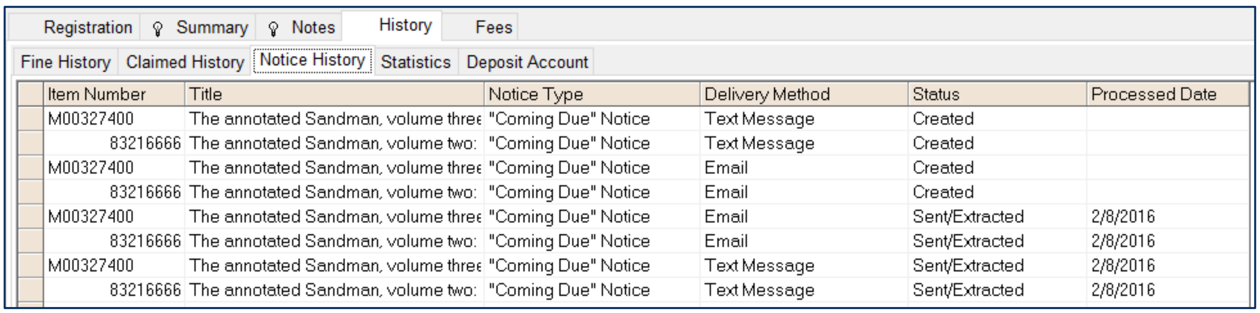
> **NOTE:** BNQ is short for a legacy term “borrower enquiry”. It means someone used a prepaid cash card at a payment terminal.

The **Claimed History** tab displays the claimed history with the library over the lifetime of the account. This tab will list all items that have been marked Claimed Never Had, and logs all transactions associated with each Claims Never Had item. No changes can be made from this tab. The Claimed History tab also logs all transactions associated with each Claims Returned/Never Had item.



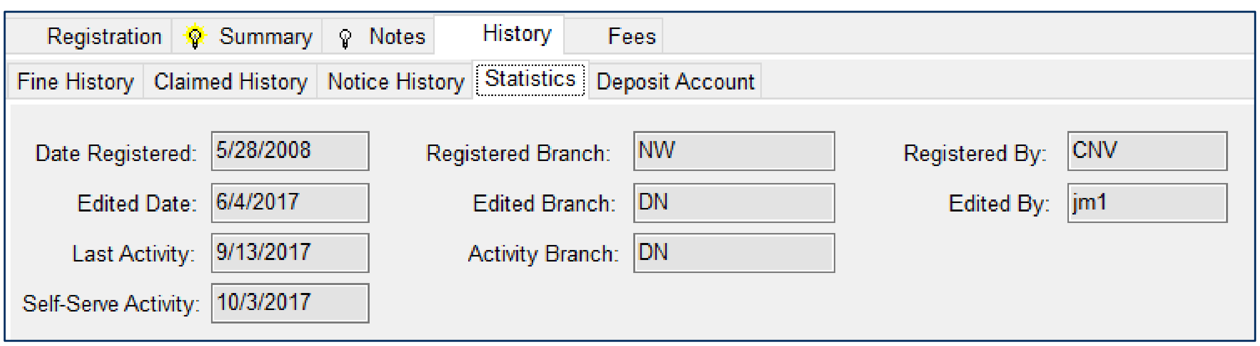
Item Number	Title	Charged	Due	Branch	Action	Last Acti
70882702	What's eatin' Yosi?	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 2:03:53
75252182	Horrible Harry and the dead letters.	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:54
78766915	Pippi Longstocking	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:56
36337791	Junie B., First Grader Aloha-ha-ha	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:58
38239128	Her cowboy hero /	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:50:00
84607368	The noticer returns sometimes you find	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:50:02
73156682	How to build a house: a novel.	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:50:04
62280717	The orphan girl and other stories: Wes	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:50:05
38239128	Her cowboy hero /	1/27/2015	2/10/2015	NW	Item was Returned	3/2/2015 3:40:13
84607368	The noticer returns sometimes you find	1/27/2015	2/10/2015	NW	Item was Returned	3/2/2015 3:41:11

The **Notice History** tab displays all text, email, and paper notices that have been created and sent in the past 6 months.



Item Number	Title	Notice Type	Delivery Method	Status	Processed Date
M00327400	The annotated Sandman, volume three	"Coming Due" Notice	Text Message	Created	
83216666	The annotated Sandman, volume two:	"Coming Due" Notice	Text Message	Created	
M00327400	The annotated Sandman, volume three	"Coming Due" Notice	Email	Created	
83216666	The annotated Sandman, volume two:	"Coming Due" Notice	Email	Created	
M00327400	The annotated Sandman, volume three	"Coming Due" Notice	Email	Sent/Extracted	2/8/2016
83216666	The annotated Sandman, volume two:	"Coming Due" Notice	Email	Sent/Extracted	2/8/2016
M00327400	The annotated Sandman, volume three	"Coming Due" Notice	Text Message	Sent/Extracted	2/8/2016
83216666	The annotated Sandman, volume two:	"Coming Due" Notice	Text Message	Sent/Extracted	2/8/2016

The **Statistics** tab displays system supplied information about the activity of the account. This includes account Registration Date and Branch, account Modification Date and Branch, and account Activity Date and Branch.



Date Registered – The date that the account was added to the database.

Registered Branch – The Branch where the registration occurred.

Registered By – The three-letter user alias of the logon used to register the account. If completed online, the alias will be ECA. If it was registered pre-CARL.X, it will be CNV (conversion).

Edited Date – The date that the account registration information was updated.

Edited Branch – The Branch where the registration update occurred.

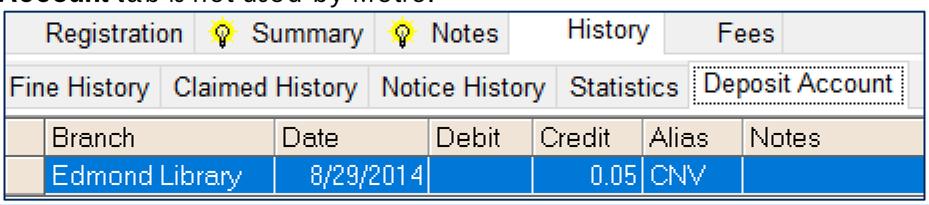
Edited By – The three-letter user alias of the logon used to update the registration information of the account.

Last Activity – The date of the most recent transaction activity that occurred on the account. Transaction activity includes item checkout, item renewal, hold placement and fine payment.

Activity Branch – The Branch where the most recent transaction activity occurred.

Self-Serve Activity – The date of the most recent self-service activity completed by the guest. Self Service activity includes logging on to view account information online, accessing online databases, or using a Self-Check machine.

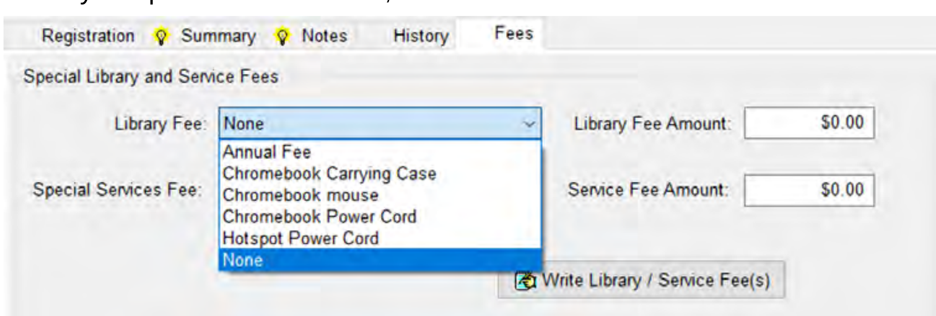
The **Deposit Account** tab is not used by Metro.



FEES

This tab displays Special Library and Service Fees created by MLS. Currently used for Annual Fee, Chromebook mouse, Chromebook Power Cord, and Hotspot Power Cord. Choosing and writing a Library/Service Fee will create a Manual Fine on an account.

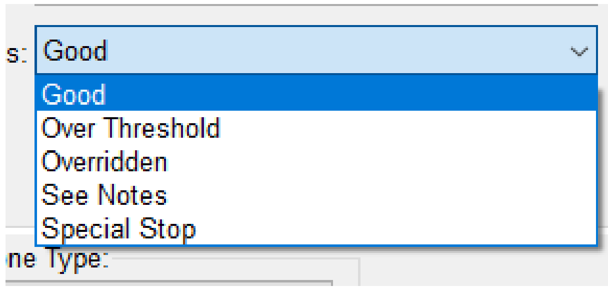
To add a Library or Special Service Fee, see more information under **Annual Fee** information.



CARL STATUSES AND BLOCKED ACCOUNTS

CARL STATUSES

As stated earlier, when we create new accounts, the account status is "Good". There are five statuses total.



GOOD

Accounts will have the status *Good* if there are no issues blocking the account. Items may be 28 days or less overdue and they may owe fines under the $50 threshold.

SEE NOTES

Staff manually add "See Notes". This will block them from using self-checks and some online services. Use this when it is ESSENTIAL to draw attention to the notes for an account. Be sure to remove the status and the associated note as soon as possible.

Note: If you place an "Urgent" note on the account, it will block the account in CARL.X so staff cannot override the note to check out. If you place an "Urgent" note on the account, you will want to change the status to "See Notes" as well.

OVER THRESHOLD

Accounts automatically go Over Threshold when there are materials 29 days overdue, $50 or more in fines, 1 or more Lost items, and over the Claims Limit.

When accounts have this status, they are allowed one override. Staff should educate account holders on the issue when they allow the override. Adding a standard note regarding education may be helpful for staff the next time they come in.

OVERRIDDEN

Overridden accounts are accounts that were over threshold that staff did a manual override. At this point, action must be taken to remove the block.

SPECIAL STOP

Special Stops are manually changed by the ILS Administrator or Library Manager (bans). If an account has a Special Stop, do not remove the status or notes on the account. Contact your Library Manager if the ban has been taken care of or the ILS Administrator if it appears the situation causing the status has been resolved and it's a system issue.

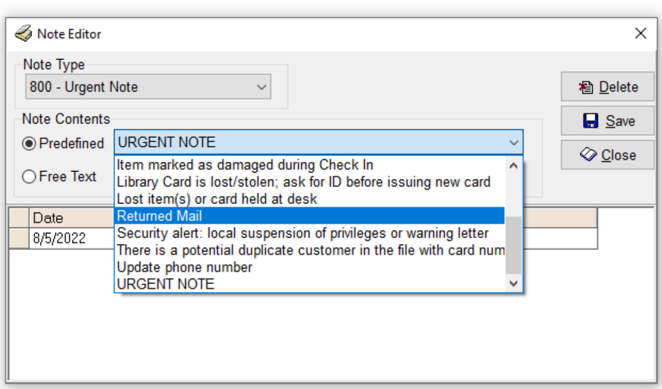
BLOCKED LIBRARY ACCOUNTS

Accounts are blocked if they have one or more of the following problems:

- Returned mail (eligibility is not clear)
- Over Threshold
  - Material 29 days overdue
  - $50 or more in fines
  - 1 or more Lost Item – over 60 days overdue
  - Over the Claim limit of 18 claims in 12 months
- Special Stops due to:
  - Bankruptcy
    - Guests receive a Special Stop if guests claim the Library as someone they owe money to. Per Oklahoma Law, materials not returned is theft, therefore, Lost material is not included in removing charges under bankruptcy. The Business Office will note the account and clear any *overdue* fines.
    - After 5 years, bankruptcy notes will be removed and the Status reset to Good.
  - Writing bounced / hot checks
    - Guests are held responsible for bounced / hot checks. Accounts are noted with an Urgent Note by the Business Office.
    - To clear these Special Stops, guests need to pay in cash. Staff must screen shot and print the CARL note and submit with the cash in the daily deposit. Questions should go to the Business Office.
    - The expiration date to these accounts are set to 12/31/2037.

RETURNED MAIL

When the library tries to send a postal notice and the post office returns it as undeliverable, a designated staff member adds a status of 'See Notes' to the account along with an Urgent Note stating there was 'Returned Mail.' Staff will also update the zip code to "00000" to assist with sending future mail to the address.



A 'See Notes' status will block the use of the self-checkout as well as some online resources.

Before removing the 'See Notes' status, verify eligibility and update the address in full, including the zip code. Be sure to remove the note when clearing the status.

LOST ITEMS

Items automatically have a Lost status when they have become 60 days overdue on an account. To be resolved, Lost items must be paid for, returned, or Claimed.

Lost items in CARL.Connect/MyAccount and Aspen Discovery show under Fees, not Loans.

CLAIMS NEVER HAD

When an item is charged to an account, but the account holder claims they never checked out the item or they have already returned the material, clear the item from the account using the Claims Never Had button. The Never Had item is removed from the account and logged in the Claimed History tab in Patron Information. The item is updated with a Lost status so staff and guests know it is not available.

> Staff should **never** mark an Interlibrary Loan item as Claims Never Had. Staff should call Interlibrary Loan for any concerns regarding the material.

Before using this process, be sure to check the shelves at any location where it might have been returned, as well as the owning location. This is the only opportunity to search for it at other locations.

Accounts may only have 18 ‘claims’ in a rolling 12-month period. All materials claimed within a 24-hour period are considered a single ‘claim event.’ If, for instance, an account holder claims two (2) items at NW at 2pm Monday and two (2) items at ED at 9am Tuesday, these count as a single ‘claim’ on the record. Once the claims limit has been reached, the guest will not be able to check out until the oldest claim is more than 12 months old or the claim has been otherwise resolved.

STEPS TO MARK AN ITEMS CLAIMS NEVER HAD

Process In Branches

1. Once the guest reaches out to staff, we need to ask them to double check at home.
    a. Possible language to use: *What branch did you return the item(s)? I will have the branch staff complete a shelf check to see if we can find the material. While I do that, please double check -- do one more check at home and your vehicle. If you still cannot find it after another search, let staff know at your next visit for next steps.*
2. Staff should take steps to complete a shelf check at the owning and returned branch(es).
    a. If staff do not find the item(s), they should make a note on the account to include: what the item(s) are, and that they were not located at “x” branches.
    b. If staff do find the item(s), they should be checked in as returned and the guest should be notified.
2. The next time the guest visits, if they comment they did not find after double checking:
    a. Staff should look at Notes for the following

    i. Is there anything about shelf checks by branches for the material?
    ii. Is there a pattern of items Never Had or concerns materials are not coming back?

b. Staff should look at History – Claims History
    i. Use this tool to help determine if the item should be claimed or see if there is a pattern/trend of staff marking items Never Had

c. Staff may mark material(s) as Claims Never Had OR let the guest know they are responsible for the replacement cost based on history, sorter operations, and/or notes
    i. Possible Language to use: *I have removed this item from your account. If you find it, please return it.*
    ii. Possible Language to use: *Based on how the sorter operates.. Based on your account.. you will be responsible for the replacement cost of the item. (Depending on the status of the item) do you want to take care of the cost today? We do have payment plan options, but once it's paid, if you find it, it's yours to keep. We don't offer refunds.*

CIS Process

1. CIS to notify the owning and returned branch locations.
2. Branch staff complete a shelf check.
    a. The last location to reply all to the email will:
        i. Notify the guest the item was not located
            1. Language to use: *We performed shelf checks at "x" branches and were unable to locate the material(s).*
        ii. Ask the guest to look one more time at home
            1. Language to use: *Please do one more check at home and your vehicle. If you still cannot find it after another search, let staff know at your next visit for next steps.*
        iii. Note on the account what the item(s) are, and that they we not located at "x" branches.
3. The next time the guest visits/Ask a Librarian and they comment they did not find after double checking:
    a. Staff should look at Notes for the following
        i. Is there anything about shelf checks by branches for the material?
        ii. Is there a pattern of items Never Had or concerns material(s) are not coming back?
    b. Staff should look at History – Claims History
        i. Use this tool to help determine if the item should be claimed or see if there is a pattern/trend of staff marking items Never Had
        ii. Staff may mark materials as Claims Never Had OR let the guest know they are responsible for the replacement cost based on history, sorter operations, and/or notes. Possible Language to use: *I have removed this item from your account. If you find it, please return it.*

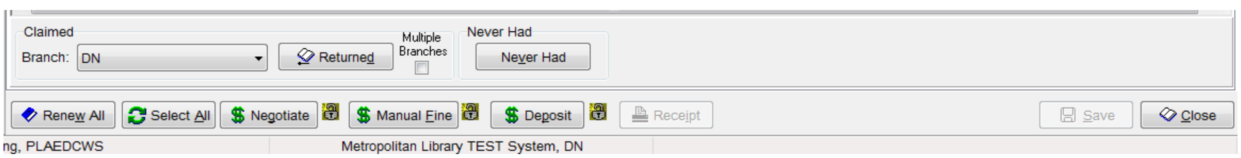
iii. Possible Language to use: *Based on how the sorter operates.. Based on your account.. you will be responsible for the replacement cost of the item. (Depending on the status of the item) do you want to take care of the cost today? We do have payment plan options, but once it's paid, if you find it, it's yours to keep. We don't offer refunds.*

Claims Never Had Report

An item that has been claims never had will appear on the Claims Never Had List (circulation report #62). This report is run every Wednesday at each branch. More details on how to run and process can be found in the [Claims Never Had Report section](#).

To mark an item Claims Never Had

In the CARL.X Patron Summary tab, select the Charges radio button. The following options will display:



Highlight the items to be claimed and then select the Never Had button.

Claims Never Had BRB

If an account is blocked due to reaching the claims limit, a Big Red Box will come up stating the account is over threshold.

- It will not prevent staff from marking more items Claims Never Had.
- If it is not clear why the account is at threshold, it is possible the guest is over the Claims Never Had limit.
  - Check the "Overdues" radio button first to ensure no items are 29+ days overdue as the same BRB will populate.
- Staff should look at the Claims History tab to see if that is what caused the block.

OVER THRESHOLD

When an account has material 29 days overdue, the material must be renewed or returned to reinstate the account. When an account has accrued over $50 in fines, the fines must be reduced to under $50 before checking out. Lost items must be resolved before checking out. This can be achieved by paying fines through the Point-of-Sale system, by staff waiving fines, returning the Lost item, or a combination of these. The status shows as 'Over Threshold'.

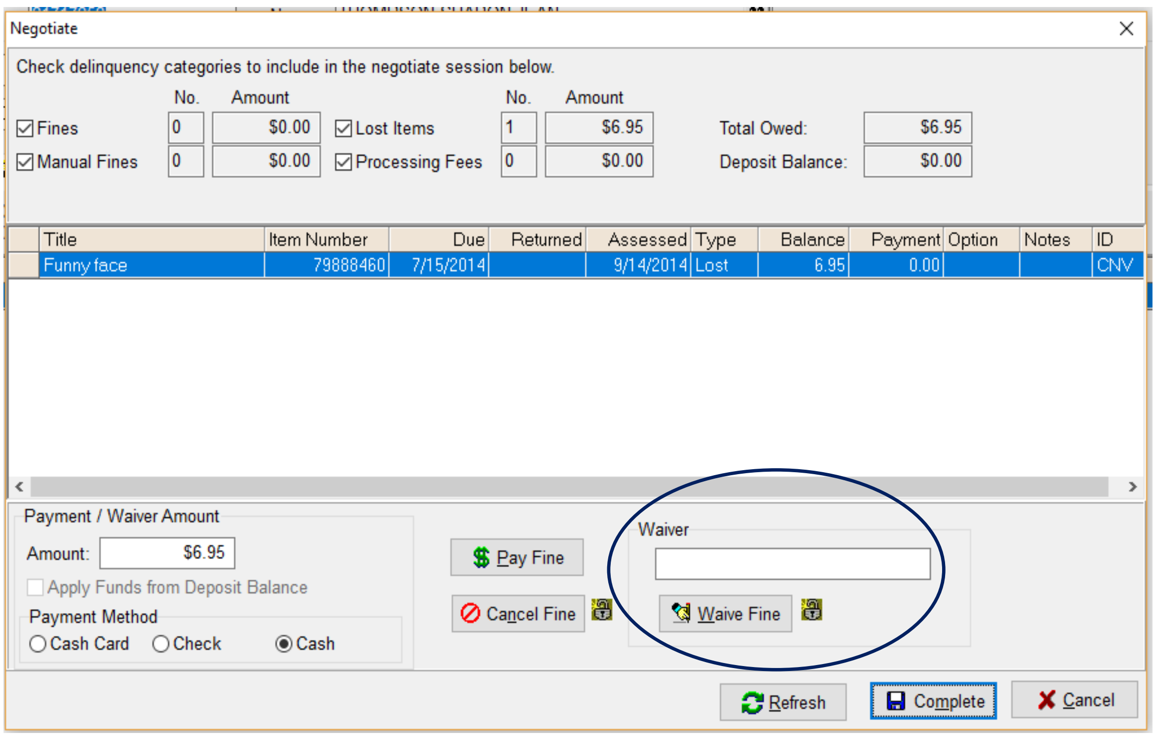
WAIVING AND CANCELLING FINES

WAIVING FINES

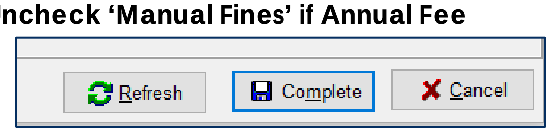
To waive fines, select Negotiate at the bottom of Patron Information.

> **For ILL fines/fees/lost items:** Requests to waive *fees* and *lost* charges on ILL items require contacting the manager of ILL. Guest Services staff are not authorized to waive these charges. Frontline staff waive ILL *overdue* fines as good gesture *if* the material is returned. Frontline staff know guests and situations best. However, it is good practice to call ILL first. Calling the main ILL line is sufficient. Of course, if it is fees or lost/damaged ILL Items, that must go through ILL.

This is the negotiate window. This is where we cancel or waive fines.

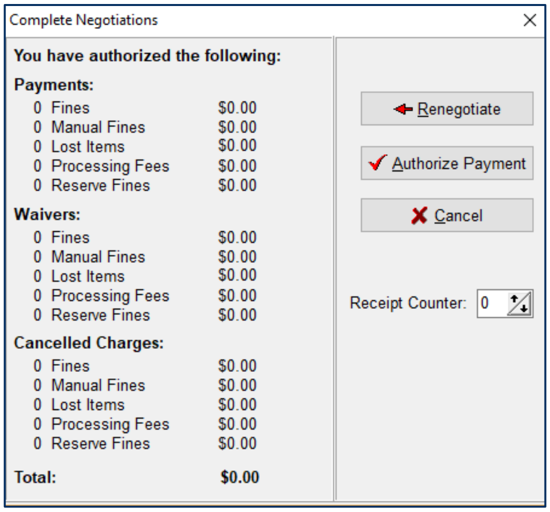


To waive the fine, check / uncheck fines as needed. **Uncheck 'Manual Fines' if Annual Fee charges are present.** Enter a waiver reason (educated, goodwill, illness, inclement weather, or employee). Click Waive Fine.



Click Complete.

The Complete Negotiations window will open:



Click Authorize Payment if everything is correct.

CANCELLING FINES

There are times when cancelling fines may be more appropriate than waiving fines. Cancelling fines should be used when the account should not have been charged. The fine could be a system error or a staff error. For example, if we charge an Annual Fee twice on an account in the same year. We would want to cancel the fine instead of waiving it.

AUTORENEWAL

Material: Accounts with “Good” and “See Notes” statuses will attempt to renew material three days before the due date. Accounts with “Over Threshold”, “Overridden”, and “Special Stop” statuses are ineligible to renew material via autorenewal.

Patron: Accounts in "good" status are eligible for autorenewal if they have a last activity and/or last self-service activity date in the past 6 months 14 days before the account expires. Accounts with statuses "See Notes", “Over Threshold”, “Overridden”, and “Special Stop” will not attempt to go through the patron autorenewal process.

DELETIONS

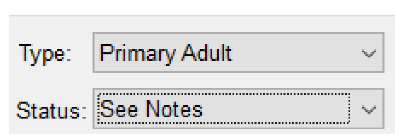
Once accounts are expired for five years, they are deleted monthly.

Once any fine / fee / lost charge is on an account for five years, it is deleted monthly.

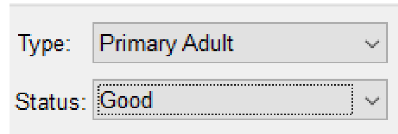
RESETTING THE OVERRIDE STATUS – SUPERVISORS ONLY

When an account has received one Override, either the block on the account must be resolved or a supervisor must reset the Override status.

To reset the Override status in CARL.X, in the Patron Information screen, change the account status to ‘See Notes’ and save the changes.



Then, change the status back to Good and save the changes again. The status will automatically change back to Over Threshold when the changes are saved.



When working with individuals with payment plans, this is the procedures local supervisors will need to reset the override status in order for material to be checked out. An informational note should be added to the account to inform staff what the agreed upon payment plan is.

PAYMENT PLANS

BEST PRACTICES

- When working with individuals with payment plans, an informational note should be added to the account to inform staff the agreed upon payment plan.
- Guests may check out one item each time they pay.
- Staff must email their local management team to reset override each time after the guest pays/checks out.
  - Managers, see the below instructions to reset the Override in CARL.X.
- Payments must be made in the library as we cannot accept partial online payments.
- Payments may be tracked in CARL for the past 6 months. For additional payment history, email ILS Administrator.

When setting up the payment plan, an initial conversation must be had between the guest and staff member to set a fair and reasonable cost to pay. Ideally, the guest is paying weekly/bi-weekly and may check out one item each visit they pay if they return their current charged item. It is recommended guests return their items to staff when they pay and/or check out.

Staff may make exceptions, but we need to make sure that the terms are agreeable and reasonable. If the guest can't meet the terms down the road, we modify and work with the guest to come up with new terms to the payment plan.

Staff should use Informational Notes to note if a guest is on a payment plan. Wording should be similar to as follows: *Guest agrees to payment plan of $x every week/month/etc. May check out x-number of materials while on payment plan.*

EXAMPLES

If the guest owes $150 in lost items but cannot pay at once, ask them what they think a fair cost to pay would be.

- Option A: A guest expresses hardship / staff see the items are older and the guest and staff member agree the guest should pay $100 instead of $150 listed on the account. Have a conversation to see what they can pay weekly/monthly. Make an informational note on the account to the terms. Make sure you add a standard note we are waiving any fines after they hit a specific dollar amount.
- Option B: Maybe the guest can pay $5/weekly. Make an informational note on the account to the terms.

If the guest owes $300 on their and their three children's accounts. They agree to pay $5/week total. They bring their three children into the library and want to allow them to have one item each week they pay.

- Note the account: Guest agrees to weekly payment plan of $5. They are allowed to have three charges total if they pay $5/week. Returns must be made to staff at the circulation desk to ensure they only have three charges total.

RENEW AND MANAGING LIBRARY ACCOUNTS

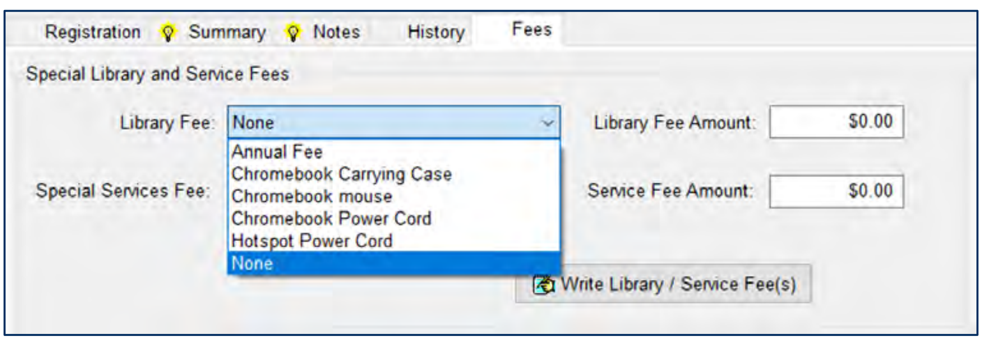
ANNUAL FEE

Account holders will receive notification two weeks before their Annual Fee account expires. The ILS Administrator will manually add the fee to their card roughly 3 days before their account expires.

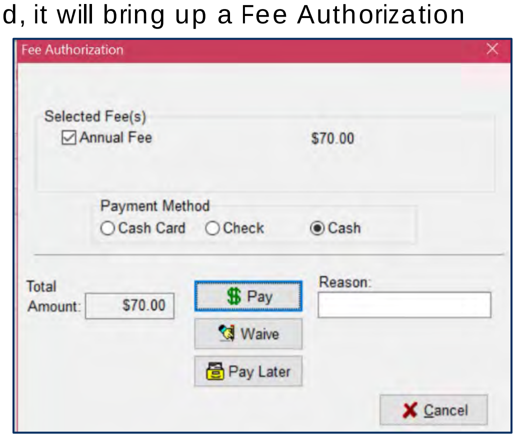
If the cardholder comes in and wants to pay their fee, make sure the fee is not already applied to another household account before processing the fee. Once paid, update all household accounts to expire one year from the expired date or one year from the date paid if the account is already expired.

To apply the Annual Fee payment:

In Patron Information, navigate to "Fees" tab, then under "Library Fee" select "Annual Fee".



Then select "Write library / Service Fee(s)" button is clicked, it will bring up a Fee Authorization box.



Always choose 'Pay Later' as the payment will need to be completed through the Point of Sale.

Once the fee has been paid, add a Standard Note to the primary account: "AFEE paid 9/13/23–[initials/branch]"

Be sure to update the expiration date for all accounts at that household and include a standard note the annual fee payment was made. Search by address to find all family members.

- If the fee is paid **before** the expiration date, set the new expiration date one year ahead from the original/current expiration date.
- If the fee is paid **after** the expiration date, set the new expiration date one year from the date of payment.

We want to keep notes on annual fee accounts for 2 years. Notes that are outdated may be deleted by any staff member.

SCHOOL ACCOUNTS

School accounts are valid for 1 year. These are different from ONECard accounts, which are updated automatically. Individuals eligible for school accounts must show their eligibility each year. Once eligibility is established, the expiration needs to be set for 1 year (365 days) from eligibility date.

Reminders for Epic, homeschool, or other school accounts:

1. Student lives in our service area: gets a Primary account
2. Student lives in Pioneer service area: gets a Reciprocal account
3. Student is zoned to attend a school in OK County but lives outside OK County: gets a School account
4. Student lives outside service and outside OK county school district: gets an Annual Fee account

Greatschools.org can help you identify the school district.

LOST CARDS

If an account holder calls and wants to report a lost card, update the expiration date (Exp Date) to yesterday and add a standard note to the account.

If an account holder comes in and the account is expired due to a reported lost card, take extra care in establishing identity and eligibility. Ensure activity (checkouts, holds) on the account are by the guest.

After establishing identity and eligibility, the expiration date should be set with the month and date the new card is being issued. The expiration year should be three years in the future.

ADDRESS UPDATES

Ensure the new address provided matches eligibility for the existing account type. When account holders move, they may transition to a different card type. For example, they may change from being a Reciprocal Account to a Primary Account.

In a previous system, if they updated their address online, a standard note was added to their account, with a status of 'See Notes'. This will block them from using some services until the status is changed.

ONECARDS

ONECard address updates are handled through the school system.

We can update the address in our system, but it will get overwritten in the next batch update from the school system. OKCPS does not require addresses for enrollment, so some ONECard accounts may not have addresses associated with them. The library system does not require an address in these circumstances. Do not manually block ONECard accounts without an address.

DUPLICATE ACCOUNTS

In the case of duplicate accounts, the duplicates are merged into a single account. If duplicate accounts exist, determine which account to keep. We should **never** merge ONEcards into Primary accounts or vice versa.

DELETING ACCOUNTS – ILS ADMINISTRATOR ONLY

Accounts are deleted by request:

- When an account holder moves out of the service area or no longer wants their account active
- When an account holder has died or is deceased (*Certificate of Death is not needed*)
- When the account is clear

Once staff are told a library account is no longer needed, staff should expire the card, cancel all holds, waive all fines, and check in all material on the account and update the status to missing. At that point, staff will email the ILS Administrator the library card number and name to share the account can be deleted due to a death.

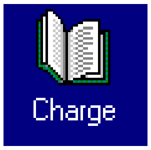
Send a request to the ILS Administrator with the name and account number to be deleted.

CARL.X CHARGE

The documents AM 100 Borrowing Policy and AM 100.1 Borrowing Procedures provide information on checkout limits, renewals, holds, what prevents someone from checking out, and damaged materials. These are found on the MLS Intranet under About > Policies and Procedures > Access to Materials.

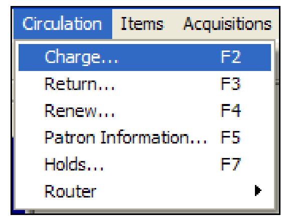
> **Customer Service Tip:** If the material that a guest is checking out is in poor condition and needs to be weeded, stamp the outside pages with a 'Damage Noted' stamp. Then,

when it is returned, it can be withdrawn. Materials may be placed on hold using the library accounts to withdraw material upon return. (<u>ILL materials will need a note added to the red label if the materials are damaged before checkout</u>). [1]



The Charge (F2) function controls the circulation of library materials by linking item records to individual account records in the form of transactions. Account records can be accessed through the library card barcode or name. Item records in Charge can be accessed by item number only.

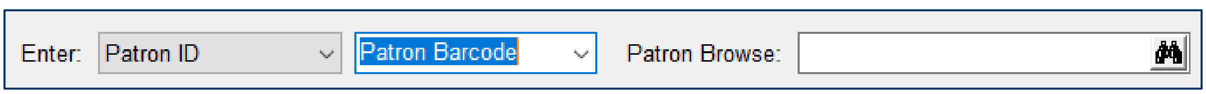
The Charge function creates a transaction record based on library-supplied parameters, determines loan periods, checks account delinquency and other blocks or flags, and calculates due dates. An item's circulation history is incremented each time it is charged, and the Charge function updates the status of the holdings record, allowing display of charge status in staff and public access modules.



Access the Charge function by clicking the Charge Icon, by selecting Charge from the Circulation menu, or by pressing F2.

PATRON SEARCHING FROM CHARGE

If the account holder does not have their card with them, their record can be retrieved in Charge through a Patron Name search. The default search is a Keyword Search. Additional searching methods can be accessed by clicking on the binoculars, or by entering no search term and pressing <Enter>.



Perform a Patron Name search by entering the search term into the Patron Browse field and either selecting the binoculars or pressing <Enter>.

Highlight the correct account from the Patron Search result grid and either double-click the line or click the 

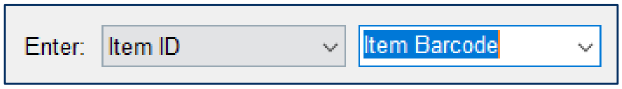
button. The record will be pulled back into Charge and will be ready to have materials checked out on the account.

HOW TO CHARGE AN ITEM

Scan or type in a Patron ID in the Patron ID Barcode field. If typing in the barcode, press <Enter> when finished.

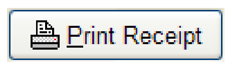
[1] *The Metropolitan Library System uses a standardized Schwaab 'Damage Noted' stamp, SKU# 37365108, which can be order from Brodart.*

Retrieve the account by scanning or typing in a Patron Barcode or by browsing by name. The cursor remains in the same box, but the box itself now says Item Barcode in highlighted text. It is ready to begin scanning item numbers to charge items out to an account.



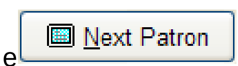
Scan or type in an Item Barcode number. Items are charged in real time, reflecting the new status in Staff and Public modules. A running list of charged items appears in the grid in the Charge window.

The Charged counter at the bottom of the grid tracks the number of items checked out in this session. The Denied counter tracks the number of items in this session that were not checked out to the account. The Quick Returned counter tracks the number of items that were quick returned in this session.

When all items are charged to the account, click on the 

button to print a receipt of items checked out and the corresponding due date.

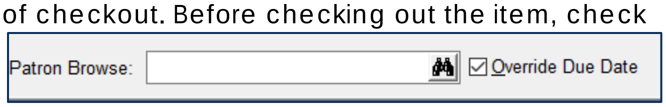
OR

At the end of the transaction, click the 

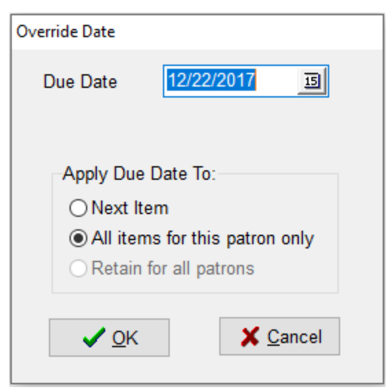
button to clear the Charge screen and print a receipt. The system is ready for the next transaction. *Note: if your location has changed the Workstation Settings for when receipts are generated, Next Patron may not generate a receipt.*

OVERRIDE DUE DATE

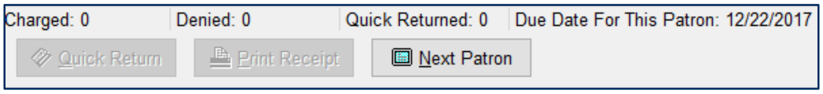
The Due Date can be overridden at the time of checkout. Before checking out the item, check the box next to the Patron Browse box.



A dialog box will appear to select the due date and whether to apply it to only the next item checked out or to all items checked out in this charge session.

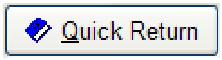


When selecting all items, a message will appear at the bottom of the Charge window:



Due dates can be overridden even if item being checked out has outstanding holds on it.

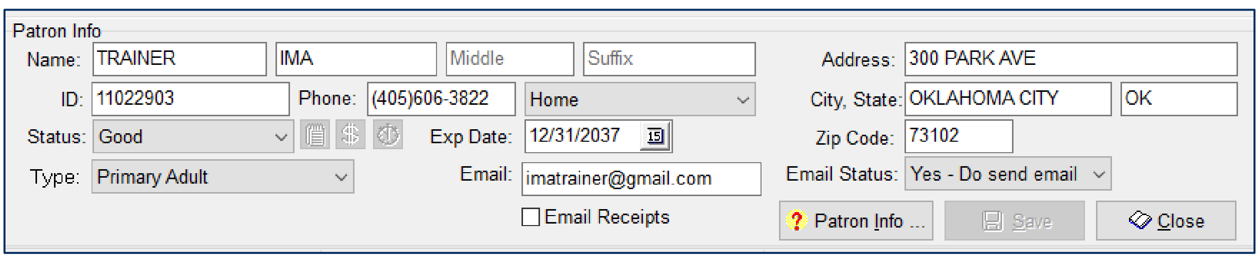
QUICK RETURN

After charging an item to an account, it may become necessary to return the item to remove it from the account. The 

option makes this an easy process without having to leave the Charge function. From the Charge window, highlight the item in the grid that the individual no longer wishes to borrow. The item will be returned from the account with the appropriate item status and the Charge grid will reflect the Quick Return.

PATRON INFORMATION FROM THE CHARGE SCREEN

In any given Charge session, you may need more details about an account. Charge makes it easy to view details about a record. Whenever an account is selected, the Patron Info panel (at the bottom of the window) fills in with basic details about the account holder.

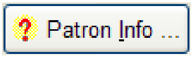


All the fields in the Patron Info panel can be edited. Status and Type fields feature drop-down list boxes for easy updates.

The Phone field is paired with a dropdown for Phone Type. This field indicates whether the entered phone number is a home or work number (i.e., a land line) or is a cell phone with the option to receive text messages. Selecting a carrier from the dropdown allows the account to receive text messages for hold notifications, but accounts must be opted-in through the Patron Information screen. There is a SMS Lookup tool available to determine the appropriate carrier for a given phone number at **http://smslookup/**. This is only available while on a staff computer inside the library.

If there have been no problems delivering the email to the account, the text will display in black. Selecting the checkbox for email receipts and saving the record will update that preference.

The Save button will become active when any changes are made in the Patron Info panel. The system will prompt you to save the changes before moving on to the next guest.

The 

button may be used at any time to bridge from Charge directly to Patron Information.

The three icons just to the right of the Status field provide quick access to account information for details about Notes, Fines, and Overdue items. These icons are only active if Notes, Fines, or Overdue items exist for the account loaded into the Charge screen. Click on the:

Notes icon to view staff or system-generated notes

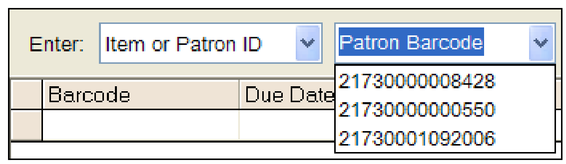
Dollar Sign icon to view fines assessed

Stopwatch icon to view overdue items

PREVIOUS SEARCH

On occasion, staff will want to access the last account used. A combo box appears in the barcode field, and the last account can quickly be retrieved. Click the down arrow to see the list of previous accounts and select the account to access it.

When an account is loaded into the Charge screen, the barcode combo box will contain the previous library account number entered in the client. *NOTE: The system will remember the last 3 accounts in the dropdown box.*



In Item Information and Holds, whenever the search key is set to Item Number Search, the last item number entered in a Circulation function will default into the search term box. To re-execute the search simply press the <Enter> key.

CHARGE SCREEN BIG RED BOX EXCEPTIONS AND DIALOG BOXES

Whenever an exception is encountered in Charge, an exception message will display. These boxes are referred to as “Big Red Boxes” or BRB’s. These boxes are designed to visually alert the staff and force action to address the situation before proceeding. Below are the various Big Red Boxes encountered in Charge and details that will determine how to proceed.

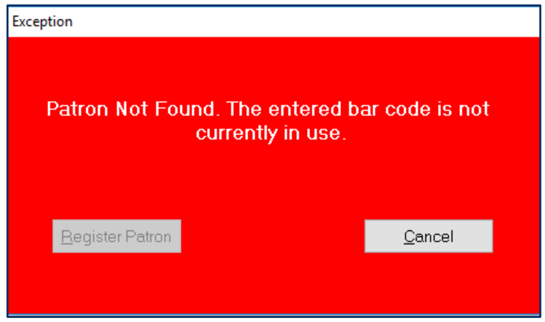
INVALID BARCODE

The Invalid Barcode box will display when an account barcode or item barcode is entered incorrectly. The only option is to acknowledge the box and try entering the barcode again. This frequently happens because an item has been scanned instead of a library card. It may also occur if the library account is typed in wrong or if an account has already been pulled up in the Charge screen.

PATRON NOT FOUND

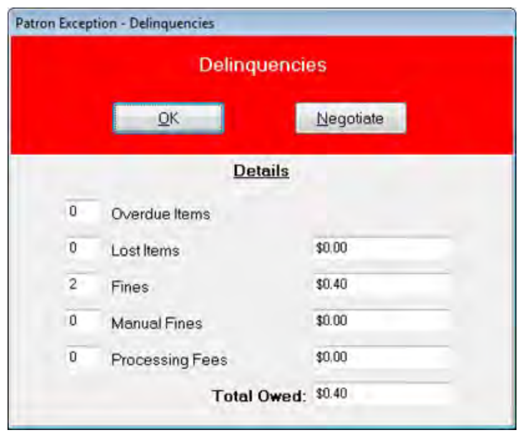
The Patron Not Found exception will display when searching by name and no names match the search data entered. The only option is to acknowledge the box and try using another search method to locate the account.

PATRON NOT FOUND, ENTERED BARCODE NOT IN USE



"The entered bar code is not currently in use" exception will display when a barcode not associated with an account is scanned into the Charge function. The only option is to select **Cancel,** navigating back to the Charge screen, for another barcode to be scanned. This can happen if they have an old library card, but it has fallen out of the system.

PATRON EXCEPTION – DELINQUENCIES



If an account currently has delinquencies (i.e., Fines, Fees, or Overdue), but not enough to block privileges, the Patron Exception – Delinquencies box will display when the barcode is entered.

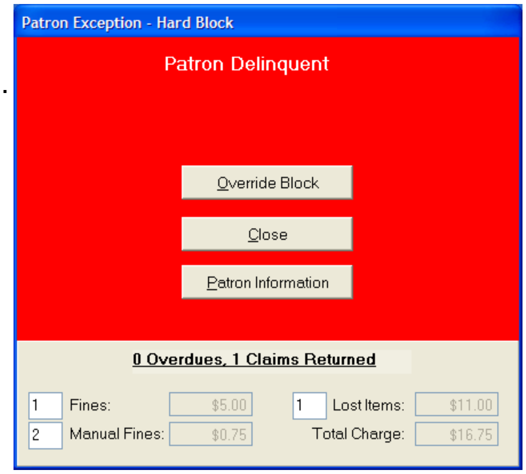
Accounts may have up to $49.99 in fines and still check out. Any Lost items or fines $50 or over will block the account.

The **Negotiate** button will allow negotiation on the delinquencies before charging any materials to them. The Charge session will be in the background, and the Patron Information – Negotiate window will be opened. Once negotiations are complete, closing the window will revert to the Charge session.

Requests to waive fees and lost item charges on ILL items require contacting the manager of ILL. Guest Services staff are not authorized to waive these charges.

The **OK** button will allow the charge session to continue and not negotiate the delinquencies.

PATRON EXCEPTION – HARD BLOCK



A hard block on an account prevents check out. A hard or system block is placed on the account when one or more of the library's delinquency thresholds is exceeded. In Charge, when a hard-blocked barcode is scanned, the exception dialog box displays, requiring action before proceeding.

Thresholds Include:

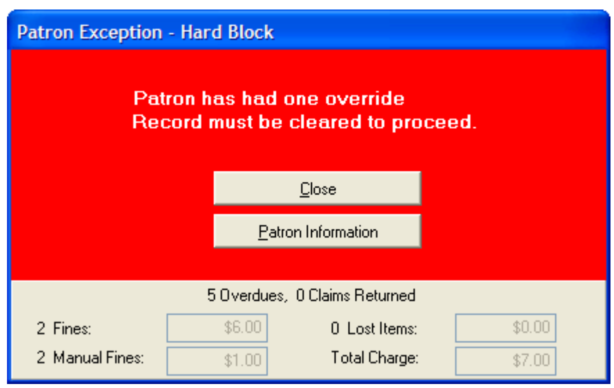
- Material 29 days or more overdue
- $50 or more in fines.
- Lost Item / Item more than 60 days overdue
- 18 Claims Never Had in 12 months

The **Override Block** button enables charging items to the account while retaining the block on the record. The Patron Exception window disappears, and the charge transaction can proceed. **Each account is allowed only one override of a Hard Block.**

The **Close** button will retain the hard block on the record and deny any charges to the account.

The **Patron Information** button will navigate to the corresponding screen. Any delinquencies can be waived or cancelled from the record then return to the Charge session.

PATRON EXCEPTION – OVERRIDDEN HARD BLOCK



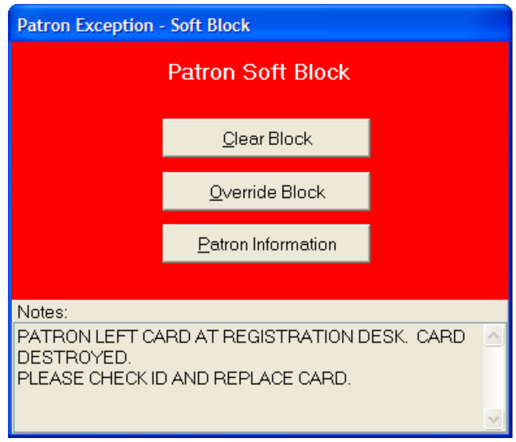
Based on library parameter settings mentioned previously, once a hard block is overridden, it may not be overridden again until the account is below all the blocking thresholds.

Supervisors have permission to reset the number of overrides an account has in extenuating circumstances. See Resetting the Override Status.

The **Close** button will retain the hard block on the record and deny any charges to the account. They may not check out any materials until all delinquencies on the record are cleared.

The **Patron Information** button will navigate to the corresponding screen. Negotiate any delinquencies from the record then return to the Charge session.

PATRON EXCEPTION – SOFT BLOCK



To add an alert for other staff regarding an account, change the status to 'See Notes' and add a note to the record. The Soft Block exception message and notes will display the next time the record is retrieved. **Soft Blocks can be overridden multiple times without being satisfied but should be taken care of as soon as possible**. *Reminder: 'See Notes' will block usage of the self-checkout machine.*

The **Clear Block** button will remove the Soft Block/See Notes status and return the status to Good. The Charge window will then display, and materials can be checked out. ***The note accompanying the status must also be deleted at this time. This does not happen automatically.***

The **Override Block** button will leave the Soft Block in place and allow material to be checked out. The next time the account holder's card is scanned, the Soft Block exception will display.

The **Patron Information** button will navigate to Patron Information. From here, view any areas of the record that are needed to resolve the alert.

If an account has an Urgent Note with a 'See Notes' status the note will not display. If the account has a Standard Note with a 'See Notes' status the note will display. If there is a Standard Note on the card but the status of the card is 'Good' no note will display.

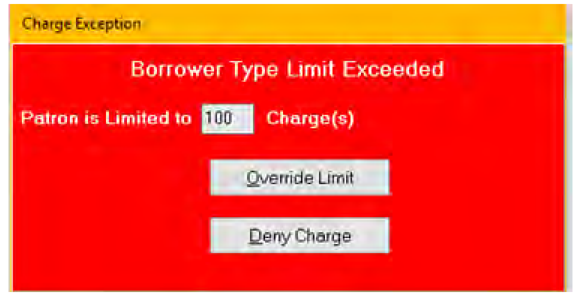
PATRON REGISTRATION EXPIRED

The Patron Registration Expired box will display when the account has expired. The box provides the opportunity to modify Patron Information and issue a renewal of the account.

The **Close** button will close the exception box without making any modifications to the record and without pulling the account into Charge.

The **Patron Information** button will navigate to the corresponding screen to view and update any information that is needed.

BORROWER LIMIT EXCEEDED



MLS maintains a 100-item borrowing limit per account, except for ONECard accounts which have a limit of 10 items. When the limit is reached, the Borrower Type Limit Exceeded box will display. It will inform staff of the number of items to which the account is limited.

The **Override Limit** button will override the limit this one time and allow all following items to be charged in the same transaction. A quick return could be performed to return the previously charged item. This may also be useful when materials were returned to the book drop but have not been checked in yet.

The **Deny Charge** button will not charge the item. The item will retain an On Shelf status.

Note: the self-check machines adhere strictly to the borrowing limit without an override option. Accounts reaching the limit are informed to speak to circulation staff.

ITEM IS CHARGED TO ANOTHER PATRON

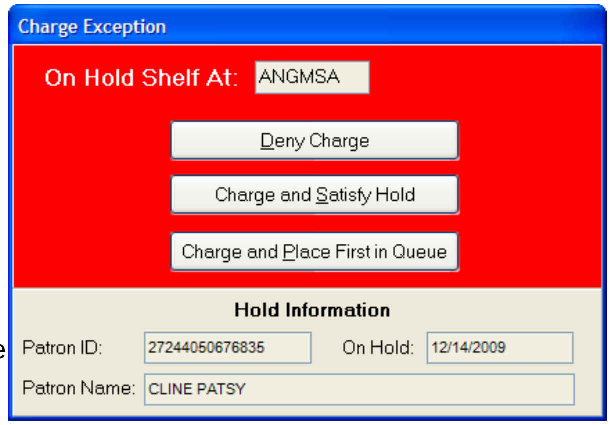
If an item charged to a different account is scanned through Charge for a new account, this exception box will display. The exception provides an alert that the item is currently charged to another account and provides options on how to proceed.

The panel at the bottom of the box displays the account that currently has the item charged and includes the date charged, the due date, and any fines that might be owed.

The **Return and Charge** button will return the item from the other account and then charge it to the new account. It will not assess the fine to the first account. Use this when the account found the item on the shelf, but it had not been properly checked in.

The **Deny Charge** button will not charge the item to the new account. The item will remain charged to the current account.

ITEM ON HOLD SHELF



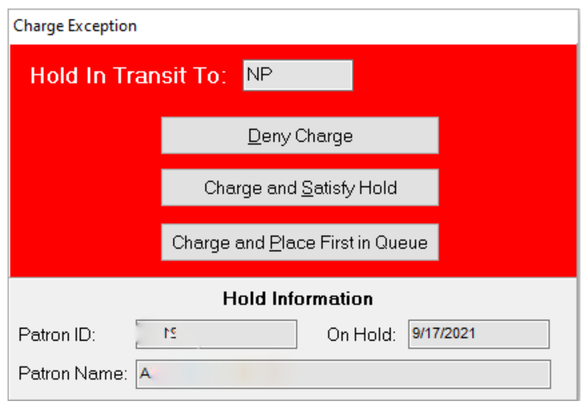
When charging items to an account, if one of the items has an outstanding hold on it for an account other than the charging account, the Hold Shelf Exception box will display.

The **Deny Charge** button will not charge the item and will leave it on the hold shelf for the account displayed in the Hold Information panel.

The **Charge and Satisfy Hold** button will charge the item to the charging account and remove the hold for the requesting account.

The **Charge and Place First in Queue** button will charge the item to the charging account and will place a hold first in the title hold queue for the account who had the item on hold.

ITEM IN TRANSIT HOLD



When an item is In Transit, if an account holder tries to check it out, the following Hold In Transit exception will display.

The **Deny Charge** button will not charge the item and will leave it as in transit status until staff trigger the hold.

The **Charge and Satisfy Hold** button will charge the item to the charging account and remove the hold for the requesting account.

The **Charge and Place First in Queue** button will charge the item to the charging account and will place a hold first in the title hold queue for the account who had the item on hold

PATRON HAS BOOKS ON HOLD SHELF

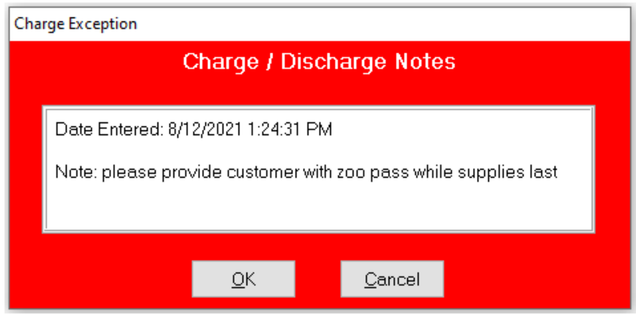
If an account holder has material waiting for them on the hold shelf, the Books on Holdshelf exception message will display when the library card is scanned or entered.

It will state which location the holds are at and how many there are.

The **OK** button will acknowledge the exception box and allow materials to be charged to the account.

The **Patron Info** button will navigate to the corresponding screen to find out what titles are waiting for the account holder.

CHARGE/DISCHARGE NOTE



Charge/Discharge Notes may be placed on items to alert staff, at the point of Charge or Return, that there is something to be noted about this item. When a Charge/Discharge Note is on an item, the Charge Exception box will display each time the item is charged or returned.

The **OK** button will acknowledge the exception and allow you to continue in Charge or Return.

The **Cancel** button will not charge the item and allow you to continue in Charge. The item will remain with an 'On Shelf' status.

Charge/Discharge Notes are currently used on hotspots that are deactivated, items with zoo pass vouchers, and for Library of Things (LOT) media codes noting a waiver is required.

ITEM NOT CONVERTED

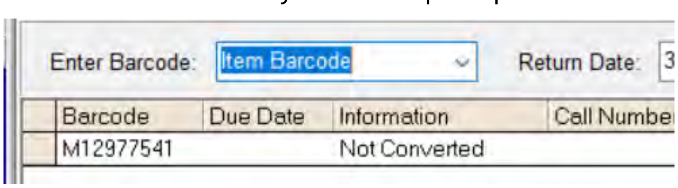
If an item barcode is scanned into Charge, but the item number is not in the holdings file, the Item Not Converted exception box displays.

Items are considered Not Converted when they are not in the item database. The exception box provides several options for how to proceed.

The **Create Temporary** button will create a temporary bibliographic record for the item. Fill in all the fields at the bottom of the window prior to clicking the Create Temporary Item button.

Note: we delete items with the status: damaged, lost and missing, lost and paid, lost to patron, missing, and withdrawn. Not all "not converted" items will be attached to a CARL account.

However, we still see returns across the system that prompts the "Not Converted" note in the Return screen:



Here are the steps when you see "Not Converted" in the Return screen.

- If you know the account holder's information:
  - CANCEL the fine. Do not use 'waive' so that it doesn't impact our waiver statistics.
- If the account cannot be identified:
  - Follow local procedures to ensure the ILS Administrator is notified.

Not Converted material may be added back to inventory as determined by the Library Manager.

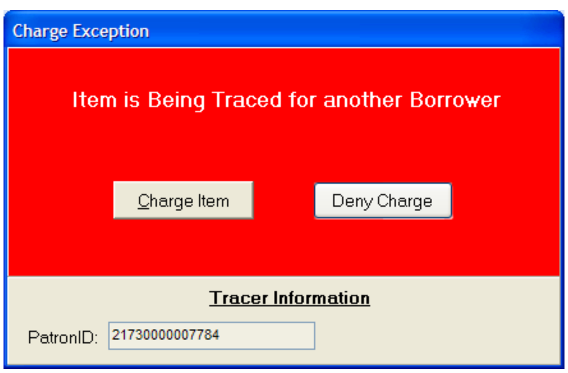
- The Library Manager will communicate with the proper selector in Collection Development to make a final determination. They will need to complete the *Catalog Consideration Form* and list the Item's BID. If there is no BID, the item will not be added back into the collection and should be sent to the Friends.

If Not Converted material is sent to the Friends, the item needs to be stamped and a line drawn through the barcode and sent to the Friends.

ITEM BEING TRACED FOR ANOTHER BORROWER

The reason items are traced for MLS is that they could not be located. Traced items are not on guest accounts; they are always on a System account. The fact that an account holder has one in hand means the original Trace is no longer needed. If a Tracer exists on an item and that item is scanned through Charge, the Traced exception box will display. Always select **Charge Item** on this screen.

The **Charge Item** button will bring up another exception box asking whether to replace the trace with an Item-Level Hold or cancel the trace. Once the selection is made, the item will then be charged. Always select '**Cancel original Trace**.'

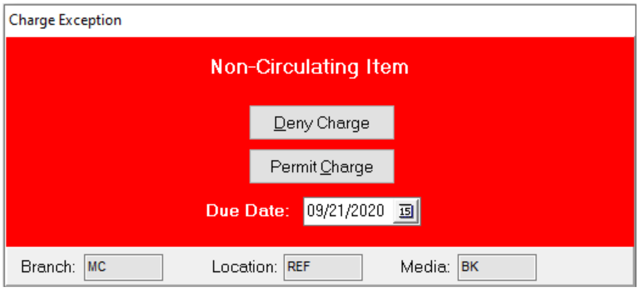


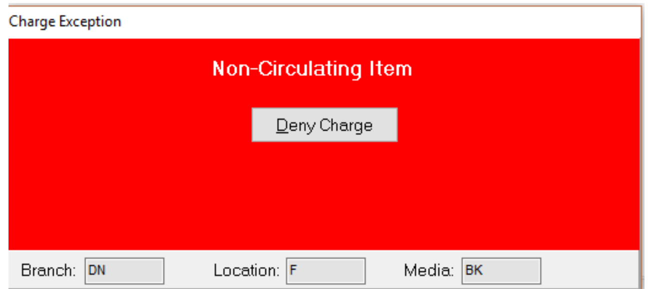
The **Deny Charge** option is not used at Metro.

NON-CIRCULATING ITEM

The exception box stating 'Non-Circulating Item' is a generic message indicating that either the item cannot be checked out or the account type is not allowed to check it out.

- Items coded Reference cannot be checked out. Staff have the option to allow an override to "permit charge". (left)
- Internet Access Only Accounts will trigger this message if they try to check out.
- Restricted accounts cannot checkout Rated 'R' DVDs and will trigger this message if they try to check one out.
- ONECard accounts are not allowed to check out non-book/non-audiobook materials and will trigger this message if they try to check one out.





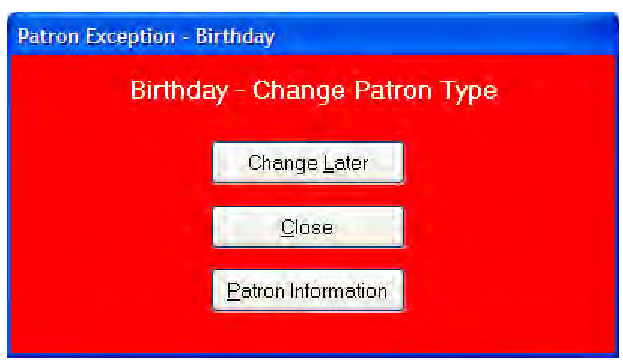
SAVE CHANGES

If the information has changed on the record without being saved, the system will prompt to save changes when selecting Next Patron or closing the Charge window.

The **Yes** button will save the changes made to the record and clear the account from the Charge function.

Selecting **No** will clear the account without saving any changes made.

CHANGE BORROWER TYPE



Parameters allow for each Borrower Type to be limited to account holders of a specified age range. The Birth Date entered in the Patron Registration screen is compared to the age range for the current Borrower Type when they are loaded into a function. If the system determines that the account holder is no longer eligible for their current Borrower Type (Student), it will prompt to update the account to the correct borrower type (Adult).

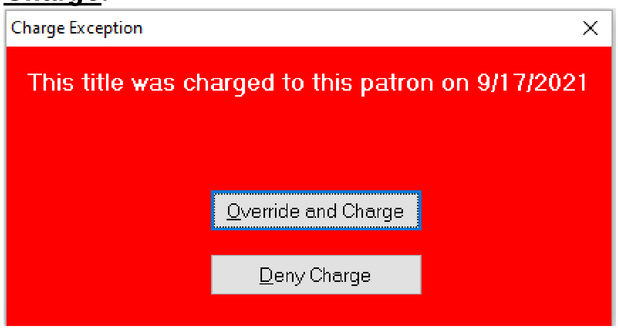
The **Change Later** button will close the box, and navigate into the Charge function, ready to check out.

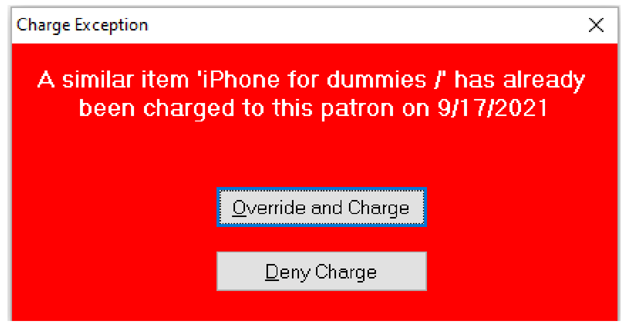
The **Close** button will close the box and navigate to the Charge screen without the account loaded.

The **Patron Information** button will navigate to the corresponding screen to update the Patron Registration Information.

OUTREACH BIG RED BOXES

Library by Mail users have the patron type "Outreach". The Outreach feature in CARL notifies staff when Outreach patron types check out material that is the same as a previously checked out item. This Big Red Box alerts Library by Mail staff to prevent sending duplicate material to users. If either Big Red Box is encountered while working in a branch, select **Override and Charge**.





Deny Charge will deny the charge.

BLOCKS AT THE SELF-CHECK MACHINES

An account will be blocked from checking out at the self-check machines if their card has a status of 'See Notes' or 'Over Threshold.' The machine will indicate that the account holder needs to visit Circulation. The same happens when an account holder reaches the borrowing limit for their account type.

CARL.X RETURN

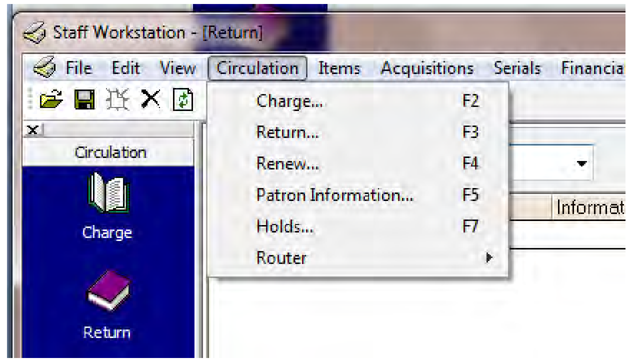
Before checking material in, staff will check the material for damage and personal effects left inside the material. This includes opening and flipping through print material and checking AV for all parts. If material is damaged or missing pieces, do not check the material in. Follow the directions below for handling Damaged Materials and Materials Missing Pieces.

For locations that use sorters, materials are generally checked when they are removed from the bin instead of before check in. Problem materials can be checked back out to the last person who had it.

If the guest questions why we check materials on check-in, one guest-oriented response is that we like to make sure they didn't leave any personal belongings in their books. For AV, another response is that occasionally people forget the last disc they used in their player. It's a courtesy for the person who last checked it out as well as the next person to use it to make sure all the expected parts are present.

The Return function removes charge transactions from account records when items are checked in. The Return function checks due dates of returned items and calculates and posts applicable fines using pre-set library-specified parameters. Return also processes outstanding holds and movement of materials between locations.

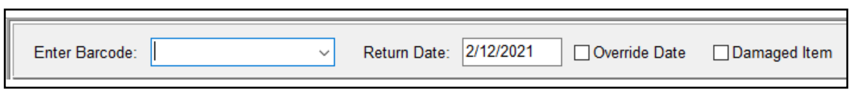
Access the Return function by clicking the Return icon, by selecting Return from the Circulation menu, or by pressing <F3>.



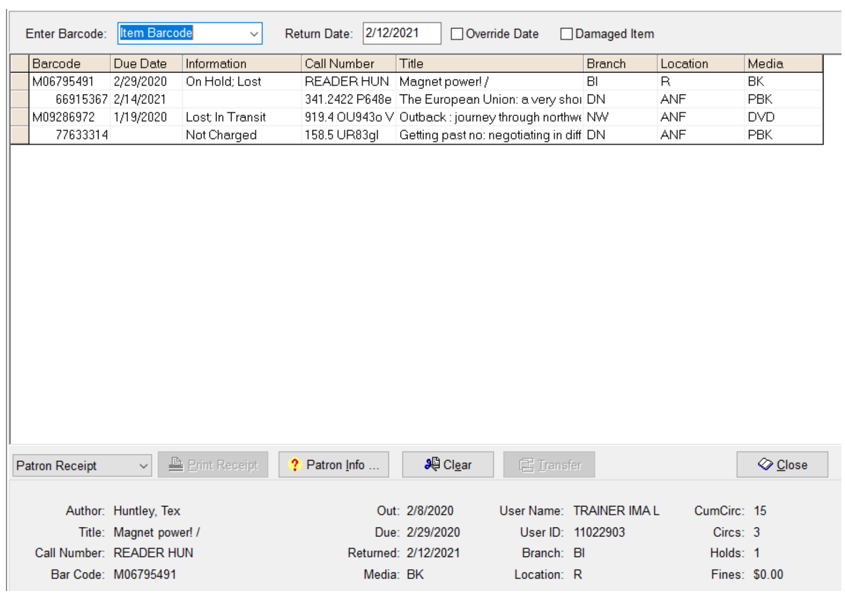
RETURNING AN ITEM

When Return is opened, the Return Date defaults to today's date. This means that all items scanned through the function will be processed using today's date.

Scan the item barcode to be returned into the Enter Barcode field. If the workstation does not have a scanner, the barcode number can be typed into the field.

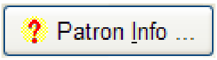


As items are scanned, the grid will populate with data about the item scanned. The grid displays data for returned items in the following columns: Barcode, Due Date, Information, Call Number, Title, Branch, Location, and Media type.



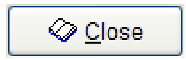
Notice that the grey area below the returned items grid displays information about the guest who had the item checked out. As each item is returned, this area will change to reflect information specific to that item. The most recent item scanned into the Return function will display at the top of the grid and will populate the bottom of the screen by default.

To view information for previous items scanned through Return, highlight the item in the grid. The bottom screen will display more detailed information about the highlighted item. Staff can access the account of the guest who had the highlighted item checked out by clicking on the

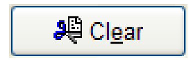


button.

The Return grid will accumulate until either the



button or the

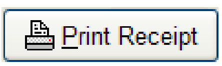


button (to remove all data from the grid) is selected. Each time the Return function is opened, the grid will be empty, and the Return Date will default to today's date.

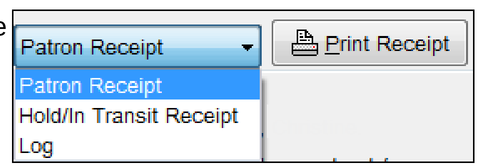
Note: Watch the screen carefully while checking in materials. If an item is scanned and it generates a BRB or dialog box, that and subsequent item(s) may not get checked in.

PRINT A RETURN RECEIPT

The



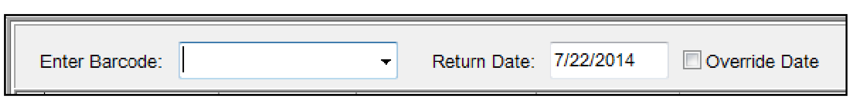
button works with the Receipt type dropdown. Selecting:



- **Patron Receipt** will print all items in the grid that were returned and had been checked out by the person who had the highlighted item checked out.
- **Hold/In Transit Receipt** will print a Hold In Transit or In Transit slip for the highlighted item, if that item has a Hold In Transit or In Transit status.
- **Log** will print all items in the Return grid.

OVERRIDE DATE (BACKDATING)

When the Return screen is opened, the function will default to using today's date as the return date. There are times to use a date in the past when returning items. If your library is closed on Sunday, set the date back to the last date the library was open. To change the date used when returning items, check the Override Date Box next to the Return Date box.

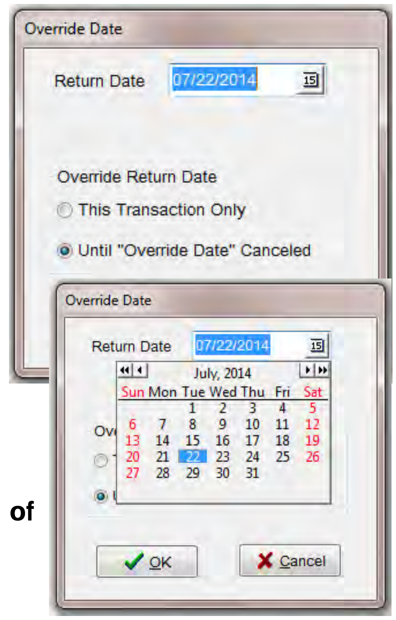


Modify the return date in the dialog box that displays or click on the calendar icon to select a date. The date cannot be set to a later date than today's date.

'Until "Override Date" Canceled' will be the default selection.

Selecting 

with this option selected will apply the new Return Date for items scanned through Return until the date is canceled. Selecting 'This Transaction Only' will apply the new Return Date to only the next item scanned through Return.



The return date being used for the next item to be scanned through Return is displayed in the Returned Date field. If a date other than today's date is being used, the Override Date checkbox is selected.

Items returned while the Override Date is activated will assess overdue fines according to the chosen return date. The status date of the item will be today's date, not the Override Date used when the item was returned.

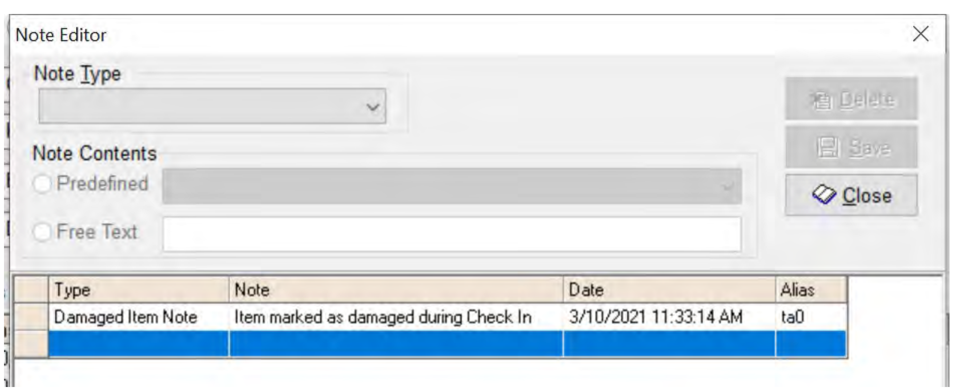
To cancel the Override Date and set Returns back to using today's date, either close the Return window or uncheck the Override Date checkbox. Upon deselecting this checkbox, a confirmation message will display.

Selecting **Yes** will cancel the date, and set Return to using today's date.

Selecting **No** will leave the overridden return date in place and send staff back to the Return screen.

DAMAGED ITEM

There is an option to check an item in as damaged from the Return window. When the "damaged items" box is checked, items will be removed from the previous account and will receive a "damaged" status. An item note will be placed on the item that it was checked in as damage status.



For hold in transit and hold shelf, appropriate steps will be taken to keep an item on hold as an ASAP hold. If the hold has already been triggered, a notification will automatically generate so staff will need to notify the account holder the item is not available, and a new copy is being requested. If the hold has not been triggered, no notification will be generated since it did not go to a “hold shelf” status.

Accounts are not manually charged the replacement cost if the item is checked in as “damaged”.

Staff must unselect "Damaged Item" after the transaction is complete.

RETURN SCREEN BIG RED BOX EXCEPTIONS AND DIALOG BOXES

Whenever an exception is encountered in Return, an exception message will display. Below are the various Big Red Boxes and other messages that may display in the Return function, along with details that will determine how to proceed.

INVALID BARCODE

If the barcode entered is not a valid barcode (i.e., it does not follow the barcode parameters of the library) an Invalid Barcode dialog box will be displayed. This may occur when scanning a barcode that is not a library barcode (ISBN for example).

HOLDSHELF

When an item is returned that has been requested by an account for pickup at your branch, the Place on Holdshelf box will display.

Selecting **OK** will place the item in Hold Shelf status for the designated account.

Selecting **Print Receipt** will print a Holdshelf slip.

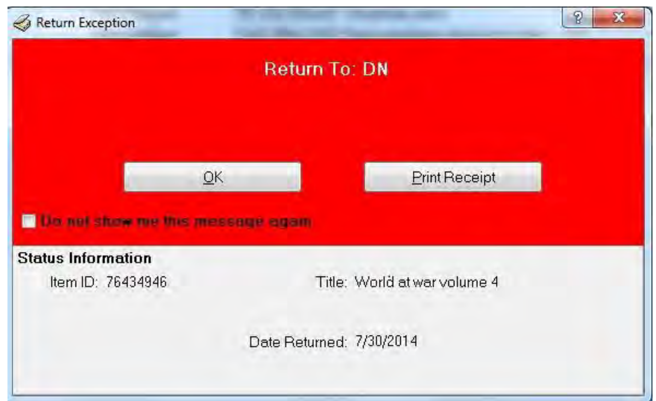
If the item was Hold-In Transit before the item was scanned to Holdshelf, the date the item was sent In Transit will be displayed on the Big Red Box.

HOLD IN TRANSIT ITEM

When an item that has been requested by an account at another branch is returned, the Hold-In Transit box will display. Selecting **OK** will place the item in 'Hold-In Transit' status. Selecting **Print Receipt** will print a slip with the Hold information and place the item in 'Hold-In Transit' status.

Note: It is best practice that we do NOT cancel materials that are hold in transit.

IN TRANSIT ITEM



When an item that belongs to another branch is returned, the following Return Exception box will display.

Select **OK** to send the item to 'In Transit' status and return to the Return screen to scan another item.

Note: Select the 'Do not show this message again' box to prevent it from showing again during the current Return window session.

ON HOLDSHELF

If an item is in a 'Holdshelf' status, and it is scanned through Return at the branch where it is on the Holdshelf, the following Holdshelf Big Red Box will display.

This may happen when:

- An account holder put an unwanted hold through the sorter and it's in the Exceptions bin
- Someone found an item on the hold shelf, removed the slip, and then left it somewhere
- Checking in items on the Expired Holds list
- The item is checked in where there is no printer and now needs a hold slip

Selecting **<u>Keep on Holdshelf</u>** will leave the item in 'Holdshelf' status. Select this when:

- The hold was accidentally removed from the hold shelf
- The hold is still valid, but it's unclear whether the account holder still wants it

- It was accidentally scanned again after printing the slip
- It does not yet have a hold slip

Selecting **Activate Next Hold** will clear the Holdshelf transaction and trigger the next hold in the queue. If there are no remaining holds, the item will be returned to an 'On Shelf' status if owned by the scanning location, or switch to 'In Transit' status if owned by another location. Select this when:

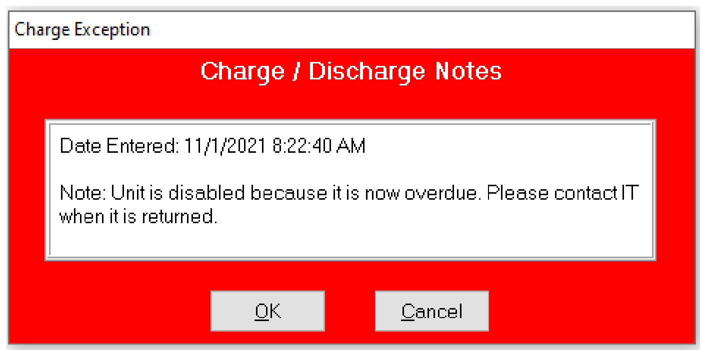
- You know the account holder no longer needs the hold.
- The material has been pulled as part of the Expired Holds list.

Selecting **Replace and Activate Next** will activate the next hold on the item and return the account holder to the bottom of the hold list (if there is no one else on the hold list it will fill the hold for the same account holder). Select this when:

- The account holder does not want the item at this time, but wants the item to remain active on their hold list

CHARGE/DISCHARGE NOTES

Charge/Discharge Notes may be placed on items to alert staff at the point of Charge or Return that there is something special about the item. When a Charge/Discharge note is on an item, this exception box will display each time the item is scanned through Charge or Return.



The **OK** button will acknowledge the exception and allow you to continue in Return.

The **Cancel** button will stop the return process for this item. The item will remain checked out.

Charge/Discharge Notes are currently used on hotspots that are deactivated, items with zoo pass vouchers, and for Library of Things (LOT) media codes noting a waiver is required.

NON-MLS MATERIALS RETURNED

Occasionally, individuals will return materials belonging to other libraries or library systems to us by mistake. If the person is present when the materials are identified, kindly educate the person that this is not our material, and it would be better to return it to the appropriate library.

If the person is not present or does not have the means to return it to the right library, library staff will hold onto the item for one week locally and try to get the material to the local media specialists from the schools. At the end of one week, library staff should send the material in a routing envelope to ILL. ILL will handle returning the material to the appropriate library.

DAMAGED MATERIALS AND MISSING PIECES

Occasionally, account holders will return materials that have been damaged while in their care. For a definition of Damaged Materials, see the current AM 100.1 Borrowing Procedures.

**If materials are damaged due to pest activity, follow the Pests In the Library procedures available on the Intranet.*

If unable to clearly identify whether an item was damaged while in that person's care, or if it has a 'Damage Noted' stamp on it, do not charge the account. Material with 'Damaged Noted' stamp should be withdrawn.

This chart aligns the AM100.1 Procedures to the damaged letter and our manual fine reasons.

AM 100.1	Damaged Letter	Manual Fine
No longer usable due to readability	No longer usable due to readability	Heavy markings Extensive Dmg
Extensive damage to cover or pages	Extensive damage to cover or pages	Heavy markings Animal Dmg Extensive Dmg Burns
Any damage due to bodily fluids	Damage due to fluids	Biohazard Chemical
Infestations	Affected by insects	Pest
A critical piece is missing or damaged	Broken screen	Unplayable Missing Piece
Material with extensive water damage	Damage due to fluids	Mold Liquid

CHARGING GUESTS FOR DAMAGED MATERIAL

If an account is charged for an item, there must be no doubt the material has been damaged while in the person's care. Damaged materials are handled by staff at the returning library for the following reasons:

- The MLS collection is seen as a system collection housed in local branches. Therefore, any library can identify when material is damaged.
- The returning library is likely a location that the person already uses. If the person used the hold process to borrow an item from a location across town, it puts the person at a disadvantage of needing to work with a library that they don't use to resolve the issue, especially when they want to see the material before agreeing to pay for it.

If it has been determined that an account is financially responsible for the damaged material(s) notify the account holder of the damage either in person (if present when the damage is discovered) or via the Damage Letter.

1. Add a manual fine for the damaged material(s).
2. Send the Damaged Materials Notice to the account holder via postal mail or email from the generic library email account.
    a. If using email, the following script should be used when communicating with guests about damaged material. The primary objective of this conversation is to share the essential information from the missing letter so they do not have to open an email attachment. When emailing the sponsor of an account, feel free to adapt the "your account" language accordingly.

        Hello Name,

        The item(s) listed below were returned to BRANCH damaged. Since other guests no longer have the opportunity to use it, the replacement cost of the material has been charged to your account.

            Title (item number)

            Damage: (staff only include one of the following reasons: no longer usable due to readability, extensive damage to cover or pages, and damage due to bodily fluids and infestations, or with extensive water damage.

            Amount due: $

        If the fees on your account exceed $50, your account will be blocked until the fees are under $50. We do not accept donations as replacement for the damaged item(s) listed above. We accept in person payments of cash, check, and credit card. Or you can pay online at metrolibrary.org/fines.

        i. Send the page for the guest (page 1) as a scanned attachment or Print to PDF (page 1 only (under pages-custom-1)) so that they do not receive the staff page as well.
3. If the item is safe to keep, keep it on the damaged shelf for 3 months. Discard materials that are unsafe to keep. Please see the Borrowing Procedures for more information about dangerous materials.
4. Give them the opportunity to keep the material once paid for.
    a. If there are overdue fines associated with the item, you may waive them once the item has been paid for.

Use the processes below to add a manual fine and determine how much an account will be charged.

A NOTE ABOUT USING THE GENERIC LIBRARY EMAIL

As we are sending follow up emails to guests, we should be sending them from the generic library email address. Library staff should be checking the generic library email multiple times per day. There is no need to BCC or CC library group emails or individual staff. If we are checking the generic library email several times per day, any staff member can quickly go in, response to the guest, and take action that is needed. Once the interaction with the guest is done and all action items have been taken care of by library staff, the email can be deleted. All emails should be responded to within 24 hours of receiving a response from the guest.

MATERIALS MISSING PIECES

Occasionally, material will be returned with a missing disc, a disc without a case, or a Playaway missing from the case. Chargers are not considered missing pieces. If the essential part of the material is returned, the account will not be charged. For example, a DVD that only has one disc is returned without the case. The item will be checked in off the account. For Blu-ray and Video Disc combo packs, both pieces are considered essential and will follow the process below. For larger, combination sets, DVDs are considered the essential piece (i.e.: Learn to Read sets). *Managers may make the decision to treat the item as non-essential based on withdraw conditions.*

If a missing piece is returned without guest interaction (ex: via book drop), without a note listing account/name, and without an item number, do not spend extra time researching this. Immediately send the material directly to DN-CSD-Greg with a note stating that you could not determine the item number or the account it is checked out on.

For instructions on how to handle LOT material (gardening tools or discovery backpacks), please refer to the Library of Things Overview on the Intranet on how to handle missing pieces.

PROCESS FOR NOTIFYING GUESTS FOR MISSING PIECES

Follow directions for *Adding a Manual Fine* below.

1. Communicate with the account holder about the missing piece.
    a. If the guest is still present when the missing item is identified, communicate with them about the missing piece.
    b. If they are not present, notify them to let them know a piece was missing using the Missing Materials Notice via postal mail or email from the generic library email account.
        i. If using email, The following script should be used when communicating with guests about missing **non-essential** pieces. The primary objective of this conversation is to share the essential information from the missing letter so they do not have to open an email attachment.

            Hello Name,
            The item(s) listed below were returned to BRANCH with missing parts. Even though the item has been returned, other guests can no longer use it since part of it is missing. Please either return the missing part(s) to any library or contact the staff listed below to resolve this situation.
            Title (item number), Piece missing:

ii. If using email, The following script should be used when communicating with guests about missing **essential** pieces. The primary objective of this conversation is to share the essential information from the missing letter so they do not have to open an email attachment.

Hello Name,

The item(s) listed below were returned to BRANCH with missing parts. Even though the item has been returned, other guests can no longer use it since part of it is missing. Your account has been charged until the missing piece(s) are returned or paid for.

Title (item number), Piece missing: Amount due:

If the fees on your account exceed $50, your account will be blocked until the missing piece is returned or fees are under $50.

iii. Send the page for the guest (page 1) as a scanned attachment or Print to PDF (page 1 only (under pages-custom-1)) so that they do not receive the staff page as well.

2. Place a standard note on the account including the title, item #, what piece is missing, returned to library, date, and staff initials.
   a. Ex: DVD case Harry Potter Goblet of Fire #1237575 missing disc #2 returned at DN 9/12/17 and routed to Greg 9/21/17 RS
3. Charge the account the full replacement cost of the item
   a. Add a manual fine for the full replacement cost of the item
   b. Check to see if there are holds on the item
   c. Check in and withdraw the item
      i. DO NOT draw a line through the barcode or stamp it withdrawn
4. Route the item in an interoffice envelope to DN-CSD-Greg immediately after notifying the guest of the missing piece.

If the guest notifies library staff the item they are returning is a missing piece of material previously turned in, staff at the library will:

a. Remove notes on the account
b. Cancel the manual fine replacement cost
c. Check the item out to Collection Development account #24110802
   a. Do not add any notes to the Collection Development account.
d. Route the missing piece to DN–CSD–Greg with a note stating what the item is (the last piece of the missing item, i.e. from above example: missing Harry Potter and Goblet of Fire disc #2 here, case and disc #1 routed to CSD 9/12/17), the account number, and item number
   i. Put CDs/DVDs without cases in an empty case to protect it while travelling

A NOTE ABOUT USING THE GENERIC LIBRARY EMAIL

As we are sending follow up emails to guests, we should be sending them from the generic library email address. Library staff should be checking the generic library email multiple times per day. There is no need to BCC or CC library group emails or individual staff. If we are checking the generic library email several times per day, any staff member can quickly go in, response to the guest, and take action that is needed. Once the interaction with the guest is done and all action items have been taken care of by library staff, the email can be deleted. All emails should be responded to within 24 hours of receiving a response from the guest.

CHECKLIST FOR MATERIAL MISSING PIECES PROCESS (ABOVE)

- ☐ Account notified in person/phone/email/letter (circle) on _____________ (date)
- ☐ Note placed on account
- ☐ Add manual fine (description "missing piece") for the full replacement cost of the item
- ☐ Check item in
    - i. Code item Withdrawn (DO NOT draw a line through the barcode or stamp it withdrawn)
- ☐ Route item to DN–CSD–Greg

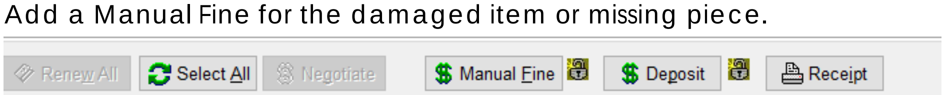
CHECKLIST WHEN THE MISSING PIECE IS RETURNED (ABOVE)

- ☐ Remove notes on account
- ☐ Cancel the manual fine replacement cost
- ☐ Check out the item to Collection Development account #24110802
    - o Do not add any notes to the Collection Development account.
- ☐ Route the missing piece to DN–CSD–Greg with a note stating what the item is (the last piece of the missing item , i.e. from above example: missing Harry Potter and Goblet of Fire disc #2 here, case and disc #1 routed to CSD 9/12/17), the account number, and item number
    - o Put CDs/DVDs without cases in an empty case to protect it while travelling

ADDING A MANUAL FINE

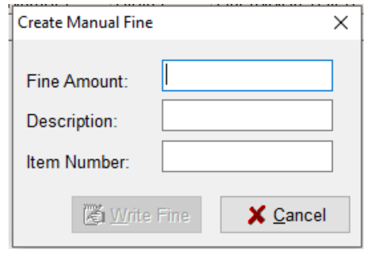
When charging for damaged materials or materials missing pieces, please use the following steps in CARL.X:

1. Check the item in as "damaged items" in Return.
    a. Double click on the item in the return grid.
    b. The Item Detail box will come up. Make note of the replacement cost.
    c. Since the item has been cleared from the account, select "Who Had It?" to get the Patron Information.
2. Navigate to the record by selecting "Patron Info" from "Who Had It" or enter the account number in Patron Information.
3. Add a Manual Fine for the damaged item or missing piece.



    a. Highlight the item in the Patron Summary.
    b. Click Manual Fine.
    c. The item number will auto-populate. Enter the replacement cost or an adjusted amount in Fine Amount.

d. Enter Description for damage:
   - Pest
   - Mold
   - Liquid
   - Missing Piece
   - Heavy Markings
   - Animal Dmg
   - Unplayable
   - Biohazard
   - Extensive Dmg
   - Burns
   - Chemical



e. Click Write Fine button.

4. For Damaged items
   a. Stamp and draw a line on the barcode.
   b. These stay at your location. Give item to the account holder after they pay or dispose of after 3 months.
5. Waive any associated fines once the item has paid for.

AGED AND WORN MATERIALS

When materials are returned, it is a great time to examine the condition of the material. No matter where material is returned, or which library owns it, if the condition of the material merits weeding, staff are empowered to weed it. Do not repair materials.

When weeding for condition, consider whether a guest will be likely to pick up that item to take it to their home. If you're reluctant to pick it up, guests will be too. If you notice something and are wondering if it's enough to merit weeding, it is!

Conditions that merit weeding:

- Anything with a 'Damaged Noted' stamp
- Dirty, smelly, moldy, water-soaked, stained material
- Water damage is an always-weed – mold grows and spreads quickly. Wavy or wrinkly pages are a sign that the book has been wet or damp.
- Visible dirt or stains
- Possible blood or other bodily fluids
- Writing, coloring, scribbling, highlighting
- Torn pages, unless it is a small tear on one of the front pages that doesn't impede use
- Pages detached from the spine, loose, torn-out, or missing pages
- Worn or faded spines or covers; missing covers – on books or magazines
- Paperbacks with very broken spines or that just look old and worn out
- Older books with unappealing or dated covers
- Older DVDs, audiobooks, or music CDs with damaged or worn cases, or scratched discs
- Yellowed pages are usually a sign of age (or inferior paper). Most of these can be weeded. However, we are experiencing an issue where the lights in our buildings are causing pages to prematurely turn yellow. Use good judgment.

WITHDRAWING MATERIALS

All materials withdrawn from our collections belong to the Friends of the Library by policy. Once materials are withdrawn and stamped, they MUST go to the Friends (unless they are in the 'dangerous' category listed in the AM 100.1 Borrowing Procedures).

To withdraw a single item owned by your library

1. Scan the item number in the Item Maintenance window.
2. Open the Item Editor.
3. Change the Status to Withdrawn.
4. Be sure the location code is set to the normal location and not BKR. This will assist Collection Development with determining which materials to replace.
5. Stamp the item next to the RFID tag with the appropriate stamp and draw a line through the barcode with a Sharpie.
6. Place in the Friends Bin.

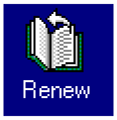
To withdraw a single item owned by another library

1. Open the Return Window
2. Check the "Damaged Items" box.
3. Scan the item in the Return window.
4. Uncheck the "Damaged Items" box.
5. Stamp the item next to the RFID tag with the appropriate stamp and draw a line through the barcode with a Sharpie.
6. Place in the Friends Bin.

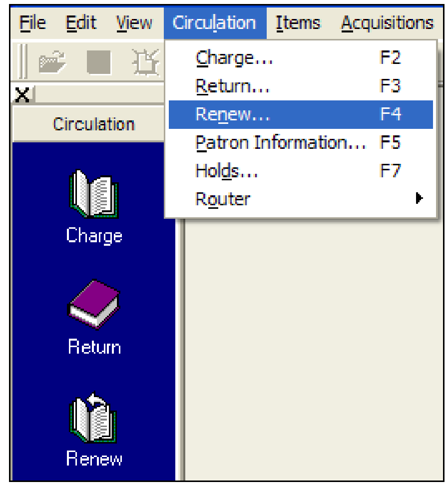
To withdraw multiple items

1. Open the Item Maintenance window.
2. Click the Quick Maintenance button.
3. Scan the barcodes of all the items to be withdrawn.
4. Click Edit.
5. Change the Status to Withdrawn.
6. Click Save.
7. Stamp the item next to the RFID tag with the appropriate stamp and draw a line through the barcode with a Sharpie.
8. Place in the Friends Bin.

CARL.X RENEW



The Renew (F4) function extends the loan period on an item according to library- specified parameters. Renew also calculates and establishes fines and shows blocks if applicable.



Access Renew by clicking the Renew icon, selecting Renew from the Circulation menu, or pressing F4.

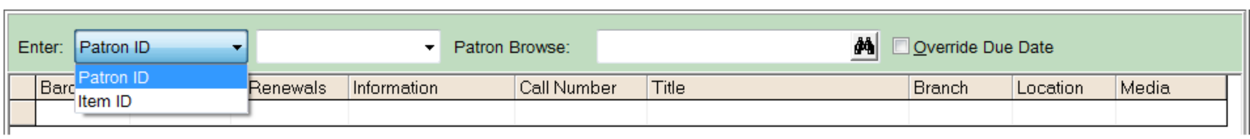
If an account is loaded in the Charge screen and the Renew function is opened using one of the above methods, the account will be loaded into the Renew function.

NOTE: We want to encourage users to use the auto-renewal process instead of staff renewing material in CARL.

HOW TO RENEW AN ITEM

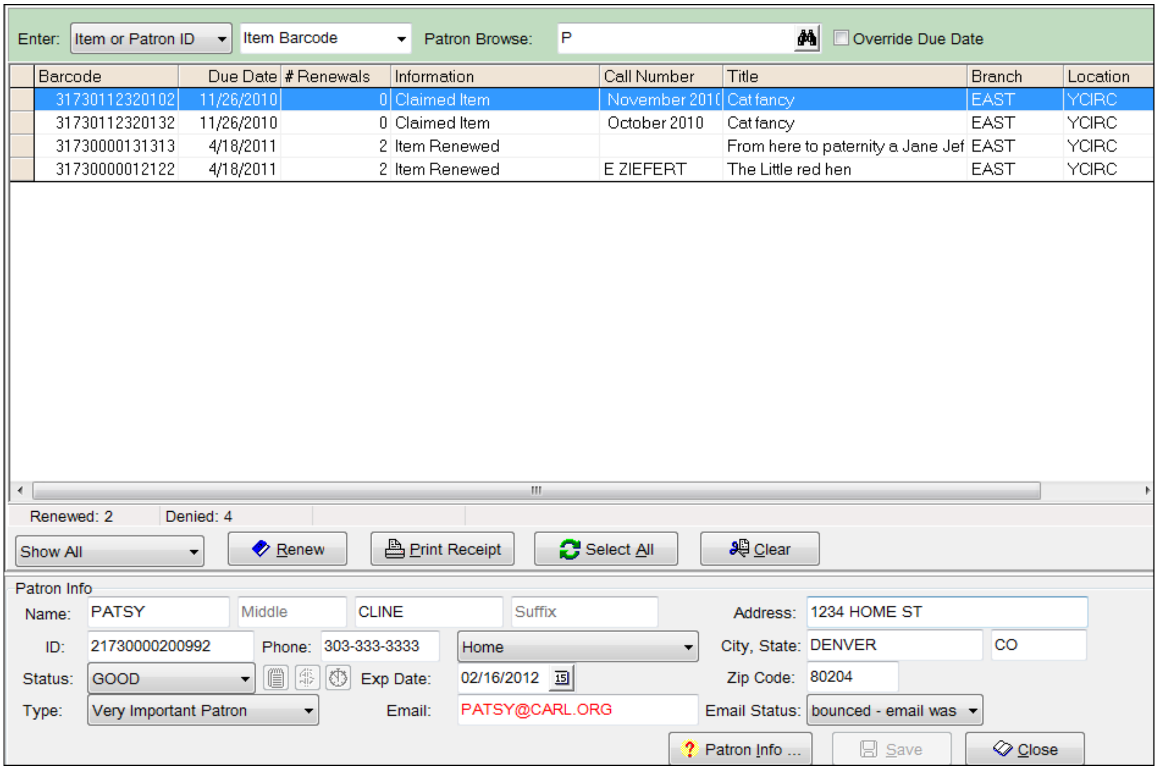
Enter the account barcode (or search for a name) and load the account into the Renew function. All items charged on the account will be displayed in the Renew grid.

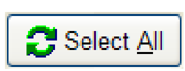
The dropdown default is Patron ID to start with the card number. It is also possible to switch the drop down to Item ID and enter an item number. All materials on the card that the item is checked out on will appear in the Renew screen.

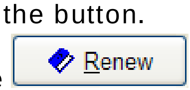


1. Scan or type in a Patron ID in the Patron ID field. If typing in the barcode, press <Enter> when finished. You may also search for a name in this screen, see instructions in the Charge > Searching from Charge section.
2. Once the account has been retrieved, the Renew screen will retrieve a list of all items currently charged to the account. Information about those items will be listed in the

Information column. If the item is in Lost status or is Overdue, the status will be indicated in this column. The "# Renewals" column indicates how many renewals on the item.



3. Select the item(s) to be renewed.
   Select one item by highlighting the item in the grid.
   OR
   Select multiple items by highlighting one item, holding the <CTRL> key, and clicking another item to highlight it.
   OR
   Select a group of items by clicking one item to highlight it, holding the <Shift> key, and clicking another item. All items between and including the two selected items will be highlighted.
   OR
   Select all items on the account by 

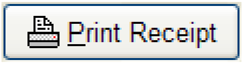
 clicking the button.
4. Once the materials to be renewed are selected, click the 

 button.

Barcode	Due Date	# Renewals	Information	Call Number	Title	Branch	Location
31730112320102	11/26/2010	0	Claimed Item	November 201(	Cat fancy	EAST	YCIRC
31730112320132	11/26/2010	0	Claimed Item	October 2010	Cat fancy	EAST	YCIRC
31730000131313	4/18/2011	2	Item Renewed		From here to paternity a Jane Jef	EAST	YCIRC
31730000012122	4/18/2011	2	Item Renewed	E ZIEFERT	The Little red hen	EAST	YCIRC

Renew will go through each item to process the renewal. If the item renewed, the Renewals counter is incremented, the Due Date is updated, and the information column displays Item Renewed.

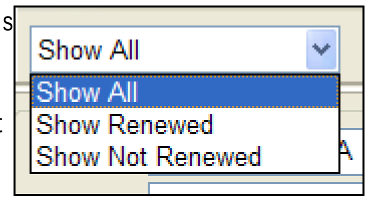
If an item does not renew the reason will appear in the Information column. The number of items renewed and denied is displayed in the status bar located above the Patron Information.

1. Selecting 

 will print a receipt listing all items that were renewed or denied, with their title information and due dates.

   ***TIP* – When an account is loaded into Renew, select all items and click Print Receipt to print a list of all items on the account without renewing them. This provides a shorter receipt than what prints from the Patron Information screen but will not include fines or lost items.**

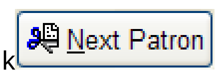
2. Choose whether to display only renewed or not renewed items by selecting from the combo box

   The default is **Show All**, which will display all items checked out to the account in the Renew grid.

   Selecting **Show Renewed** will display only the items that were successfully renewed in the Renew grid.

   Selecting **Show Not Renewed** will display only the items that were not successfully renewed in the Renew grid.

3. When the transaction is complete, click 

 to clear the Renew screen.
4. When the renewals are complete, close the Renew screen. There is an open bridge between the Charge and Renew function. If the Renew function is not being actively used, it should be closed and not left open in the background.

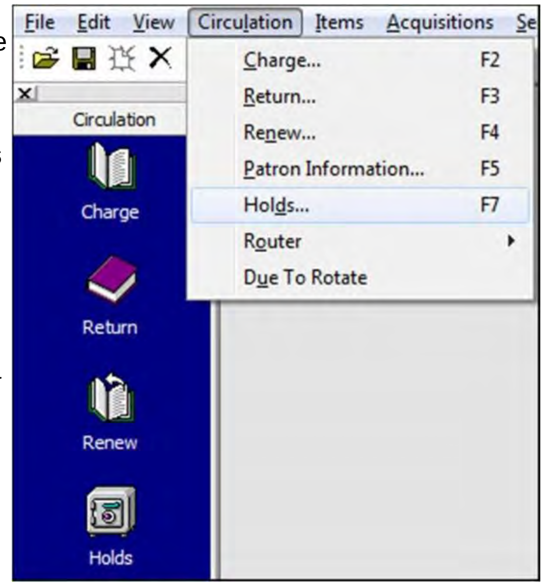
A NOTE ABOUT MAXIMUM RENEWAL

If a guest reaches maximum renewals (3) on material and they want to keep the item longer, based on the location code (which outlines if renewals are allowed), we may take the following actions:

- Normal materials that *can* have holds placed no longer need to sit on the shelf before being checked out again. They can be checked in and checked back out to the guest.
- Materials that cannot have holds placed on them (Experience Passes, Chromebooks, etc.) need to sit on the shelf for a day before the same person checks them out again because they are items of opportunity (lucky day collections).

HOLDS

The Holds (F7) function places materials on hold (reserve) for an account. Holds can be placed against materials that meet library-defined parameters governing branch, location, and media codes as well as account types or any combination thereof. The Hold function automatically queues accounts according to the date and time stamp when the hold was placed. Holds may be suspended until a selected date, or staff may enter a date that the item is not needed after. By default, accounts can place only one hold per BID record. If an account needs multiple copies, a staff member must do it. This is to protect them from requesting the same title several times by accident.



If a staff member has selected Trace for an On Shelf item from the Item Detail screen, then the Place Hold/Trace screen will display. The process of placing a Trace on an item is the same as placing a Hold. The Trace is placed against a specific item and triggers additional system reports to search for the item. A Trace is placed on the system card for the owning library.

Access the Hold function by clicking on the Holds icon from the Outlook bar, by selecting Holds from the Circulation menu or by pressing F7.

Hold Types and Overview: There are three Hold Types available: Institution, Item, Issue.

Institution

Institution holds are also known as Title Level Holds. Institution Holds will be filled by any item on the bibliographic record that can fill holds. Institution Holds are the lowest priority and will be filled when there are no holds to fill at other levels.

Item

Item Level Holds will be placed against the specific item that is highlighted in the Item Information section of the Holds screen. The hold will be filled when that item is scanned through Return, and it will show up immediately on the Item Router list if its status is 'On Shelf' (i.e., this is not dependent on the overnight processes). No other item on the bibliographic record will fill the hold. Item Holds take priority over Issue and Institution Holds and will fill first.

Issue

Issue Hold is available only when all the items attached to the loaded bibliographic record have Chronology and Enumeration data saved in the item record. Issue Holds are placed against the issue of the item highlighted in the Item Information section of the Holds screen. Any item with matching issue information that can fill holds will fill the hold. For example, placing an Issue Hold against the January 2014 issue of a title will cause the hold to be against ALL January 2014 items on that title. Any January 2014 item that is scanned through the Return function will trigger the hold, and it will also appear on the Issue Router list if its status is ‘On Shelf’. Issue Holds take priority before Institution Holds and will be filled before any Institution holds are filled.

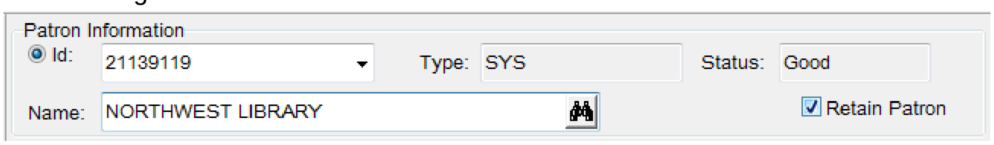
A NOTE ABOUT HOLDS

- Some item types are not intended to fill holds. Materials that are coded REF, BKR, or AP will not allow holds to be placed on them.
    - However, if **ANY** individual item for that title has a location code that **IS** fillable, then **ALL** items under that title become able to be reserved.
- For in library use of non-holdable material, the item will be checked out to the receiving library’s account. Material will be held at the desk for pickup. It will create a charge-on-charge exception, but materials do not need to be checked in until sent back to the owning library/location.

HOLD OPTIONS

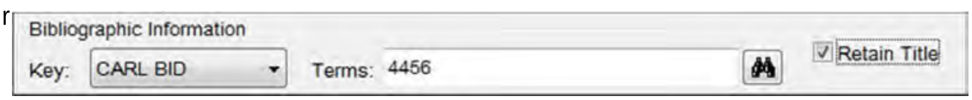
Retain Patron

By default, after placing a hold the Patron Information section of the Holds screen is reset to blank, permitting a search for the next account to place a hold for. If the same account wishes to place multiple holds, click the Retain Patron checkbox. This will prevent the Patron Information section from being reset.



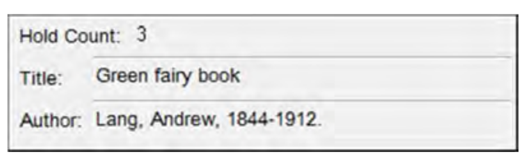
Retain Title

By default, after placing a hold, the Bibliographic Information section of the Holds screen is reset to blank, readying the screen to search for the next title to place a hold against. If multiple holds need to be placed for the same title, click the Retain Title checkbox. This will prevent the Bibliographic Information section from being reset.



Hold Count

Shows the current number of Institution Holds placed against the title.

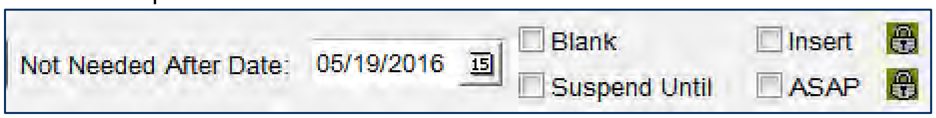


Pickup Branch

Select the branch where the hold should be picked up at the bottom of the screen. Click the drop-down arrow and choose the pickup branch. The Pickup Branch will default to the branch where the workstation is located.

Not Needed After Date

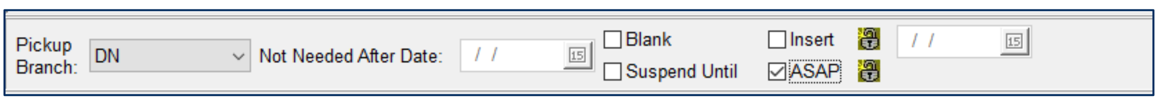
Provides the option to enter a date when the hold is no longer wanted. If the hold is not filled by the entered date, they will be removed from the hold queue. Either edit the date or click the calendar icon to change the date. Please **DO NOT** use the Blank check box – this will set a Blank Not Needed After Date, which will leave the hold in the hold queue until it is filled. The default NNA date is one year from the hold placed date.



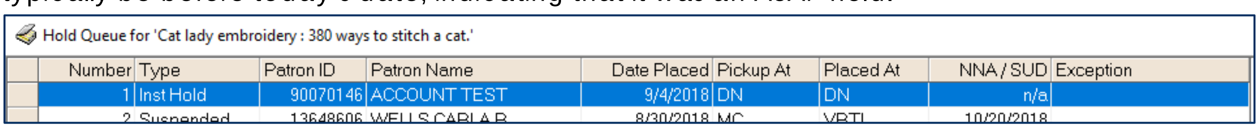
ASAP & Insert

An account can be placed at the top of the hold queue at the time staff places the hold using the ASAP function. One use for this function is to reroute a hold to another library after it has already arrived at its destination.

When placing an ASAP hold, select the checkbox next to ASAP prior to clicking Place Hold.



The hold placed dialog box will appear and the account will be placed first in queue. The NNA date will show as n/a. It will show the Date Placed as today and the other dates in the queue will typically be before today's date, indicating that it was an ASAP hold.

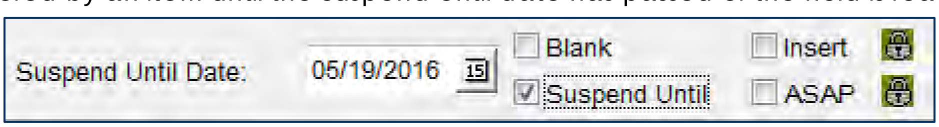

Hold Queue for 'Cat lady embroidery : 380 ways to stitch a cat.'

Number	Type	Patron ID	Patron Name	Date Placed	Pickup At	Placed At	NNA / SUD	Exception
1	Inst Hold	90070146	ACCOUNT TEST	9/4/2018	DN	DN	n/a	
2	Suspended	13648606	WELLS CARLA R	8/30/2018	MC	VRTL	10/20/2018	

The function to **Insert holds** is not currently used at MLS. It inserts new holds at the bottom of the hold queue for the specified date.

Suspend Until

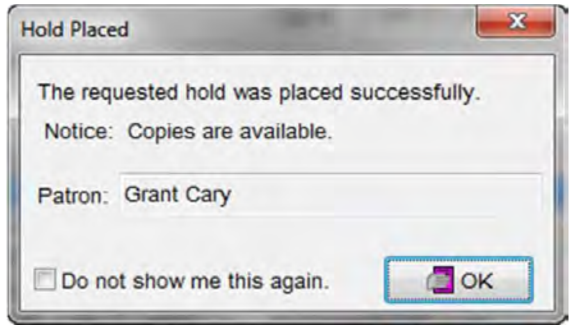
At the time a hold is placed, it may be given a Suspend Until date. This causes the hold that is placed to be inactive. A Suspended Hold will move up in the queue like an active hold, but it will not be triggered by an item until the Suspend Until date has passed or the hold is reactivated.



Other holds in the queue will be triggered around it. Once the date has passed, the hold will become active. Suspend Until dates are frequently used when account holders will be on vacation and will be unable to pick up hold material for a specified amount of time. They can place holds on each title with a Suspend Until date. When they pick up the next title in the series, they can remove the suspension on the following title, so it will be ready when they next return to the library.

When all hold options have been set, click the 

button to initiate the request. The system will confirm a hold was placed.

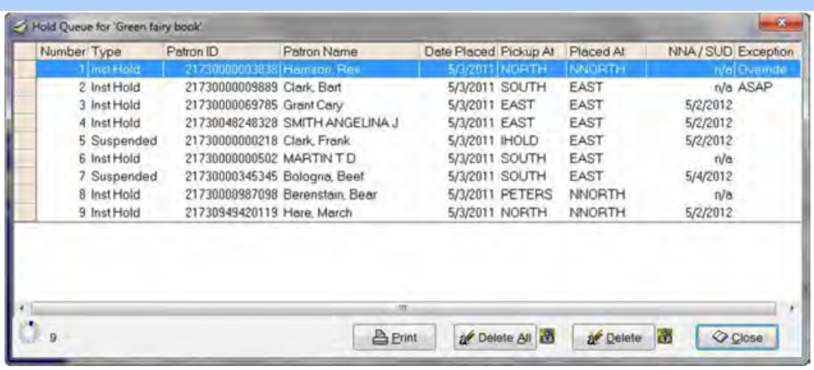


Click **OK** to clear the confirmation message. The "Do not show me this again" checkbox allows staff to turn off the confirmation message for their session in the Staff Client. When the client is closed and re-launched, the confirmation window will display after a hold is placed.

After the Place Hold button is selected, the Holds screen will reset to the systems defaults (for Hold Pickup Branch, Hold Type, Not Needed After or Suspend Until Date, etc.). Workstation Settings can be set so that the hold settings will be retained after clicking Place Hold. If the Workstation Settings are set to retain the Holds settings, the information will stay in place until the Holds window is closed, or until the settings are changed by staff.

Note: Suspended Holds During Library Renovations: In anticipation of a library being closed for renovation, MLS works with TLC to suspend all holds for accounts that have the closed location as their pickup location on the last weekday before closing, and this process is run each night the library is closed. The "suspend until" date will be set as the reopening date for the library. Staff may change the pickup locations for the account and re-activate their hold before the location is reopened. Additionally, MLS IT modifies the location's name in the "holds pickup branch" list to say the location is closed and lists the date it will reopen.

DELETING HOLDS



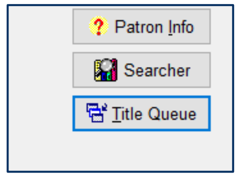
To delete holds from the Hold Queue buttons in the Holds Screen, highlight the hold and click "Delete". A Confirmation window will appear. Click Cancel to return to the Hold Queue, no holds will be deleted. Click **OK** to continue deleting the hold.

Choose a reason for the cancellation from the dropdown menu. If no notification needs to be sent, uncheck the Patron Notification Needed box. Click **OK** and the hold will be removed from the Queue.

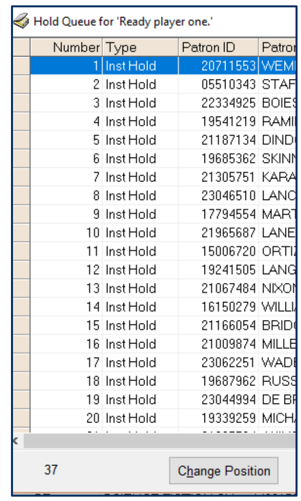
REORDERING THE HOLD QUEUE

Access Specialists and up have permission to move accounts in the hold queue.

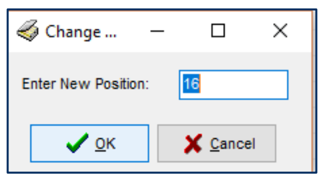
1. Search for the title via the Holds window using any search method.
2. Click the Title Queue button.



3. Select the row with the account you want to move. Then click the Change Position button at the bottom.

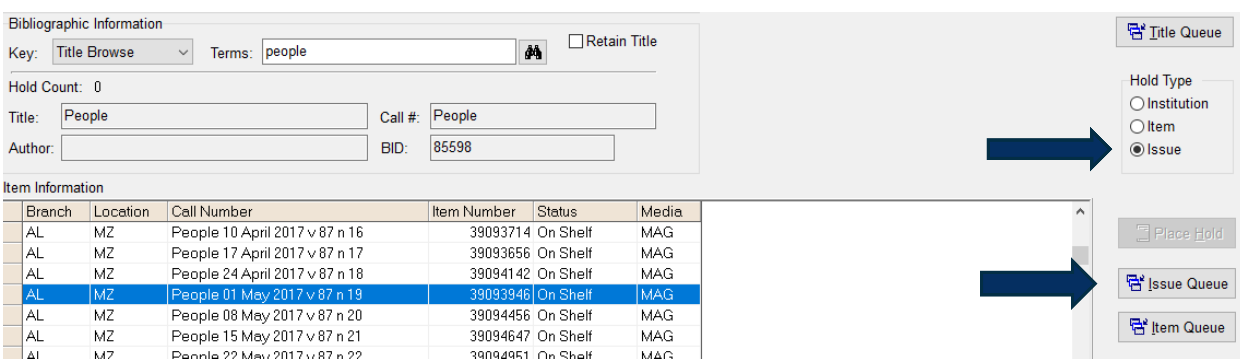


4. Enter the new position row for that account holder.
5. Click **OK**. The account has been relocated.



PLACING ISSUE LEVEL HOLDS

On the Holds screen, search for the magazine title that you are looking for. When you select an issue that has Enumeration listed, the **Issue** type hold radio button will become visible as well as the **Issue Queue** button. When an account is also loaded, the **Place Hold** button becomes active as well.



HOLD SCREEN BIG RED BOX EXCEPTIONS

HOLD HAS ALREADY BEEN REQUESTED

If an account has an outstanding hold against a title, a Big Red Box will display stating that the account has already placed a hold against this title. Select Override to place an additional

hold. Selecting Cancel will close the Big Red Box without placing the hold.

ITEM IS BEING TRACED

BRB Reads “This Items is currently being Traced”.

Items being traced cannot have an item level hold placed on them. If an item is being Traced, and staff attempt to place an Item Level Hold against it, the Item is being Traced Big Red Box will display. The only option is to Cancel the Hold Request and return to the Hold screen.

EXCEEDED HOLD LIMIT

BRB Reads “The patron exceeds their hold limit”.

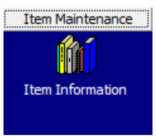
MLS limits the number of items accounts can have on hold (reserve) to 50 items. When that limit is reached, the Hold Limit Exceeded Big Red Box is displayed. The only option is to Cancel the Hold Request and return to the Hold screen.

ASPEN CATALOG ERRORS

There are situations where a hold cannot be placed for a guest. Here is a cheat sheet of the various error messages guests may receive in Aspen Catalog and what they mean:

Language in the Catalog	Reason
Your library card has expired. Visit this page to learn how to renew your card.	The account has expired.
This item does not allow holds. Please ask a staff member.	ONECard account trying to place a hold on DVD or other non-reservable format.
Warning: You have reached the maximum of 0 holds for your account. You must cancel a hold before you can place a hold on this title.	IAO Card trying to place a hold
Guest is blocked.	Special Stop placed on the account.
Your hold limit has been reached. Number of holds allowed is 50.	The hold limit of 50 in queue has been reached.

ITEM & MATERIALS MAINTENANCE



Item Information (F6) displays information about all our physical materials. Serials (like newspapers and magazines) have a separate interface to manage them, but they are still searchable in Item Information.

Terminology

CARL BID Record

Short for Bibliographic ID. This is the overall heading for a particular edition & format of a title. When searching the catalog for Stephen King's *It*, the results include a print edition published in 1986, a DVD from 2010, an audiobook from 2010, and so on. Each of these are examples of different BID records. The BID number is generally a 6-digit number. On materials cataloged after the transition to CARL.X, this number is listed on the barcode label of each physical item, located to the top left of the barcode.

BIB Record

Also short for Bibliographic ID. This term was used in our previous circulation system and is frequently used in Cataloging terminology. The term in our system refers to Bibliographic entries from before 9/2/2014. They are also located on the barcode label to the upper left of the barcode. You can always identify a BIB number (as opposed to a BID number) because it will start with a zero and be 8-digits. In CARL.X, use the Matcher File search key to use the old BIB numbers to find the CARL BID record.

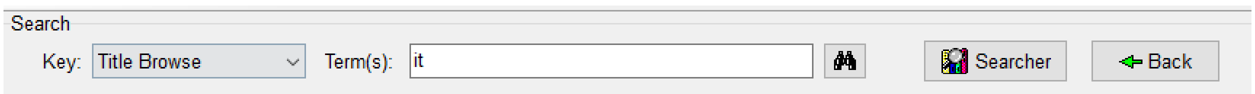
Item Record

Each BID record has one or more items attached to it. The item record describes a particular copy of that BID record. Item records help us track each physical item separately. For example, the 1986 edition of *It* has 25 copies in the system, each of which has a separate item number. On all MLS materials, the item number is on the barcode label, located at the top right of the barcode.

Item numbers from pre-CARL.X will start with a numeral. Item numbers from post-CARL.X will start with an 'M'. Items that come from Baker and Taylor automatically processed will start with an "A".

SEARCHING FOR MATERIALS

In the Item Information window, the top bar is the search interface.



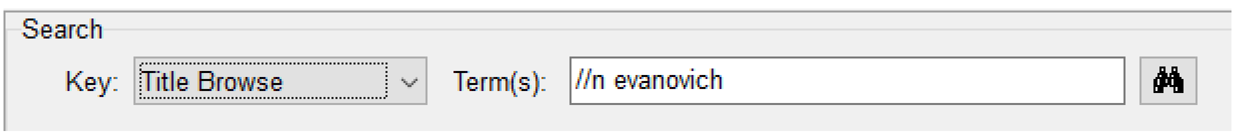
There are many ways to search for items in CARL.X. Some of the more common ways are:

- CARL BID
- Item Number
- Matcher File
- Title Browse

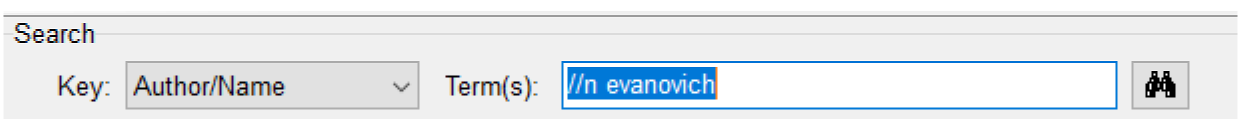
There are many shortcuts within the search box to search without changing the search key.

- //t Title Browse
- //n Author Name
- //v Matcher File (bib # from old system)
- //z CARL BID
- //w Keyword Search

Example: //n Evanovich typed in the search box with Title Browse set as the search key:



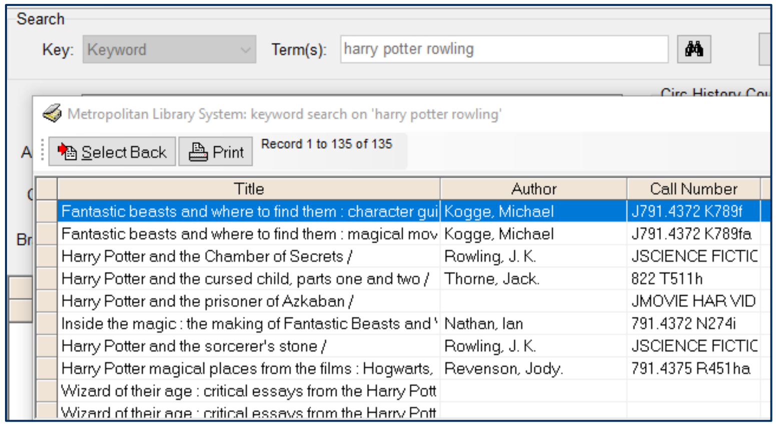
On pressing <Enter>, the search key automatically changes to 'Author Name' and performs the search:



Keyword Search

A Keyword search will search for each of the terms entered in the search box. It does not emphasize results in the author or title fields though, so it is less reliable than a Keyword search in the DISCOVERY catalog.

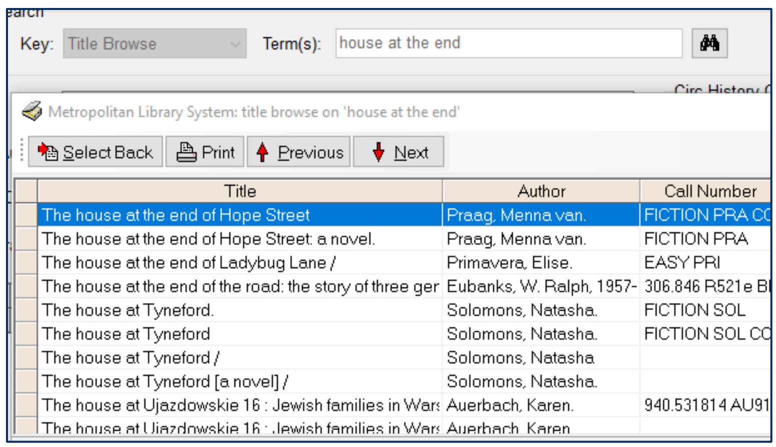
As seen here, a search for 'harry potter rowling' will return materials related to these words, but it does not place the Harry Potter books by Rowling at the beginning of the results.



Title Browse Search

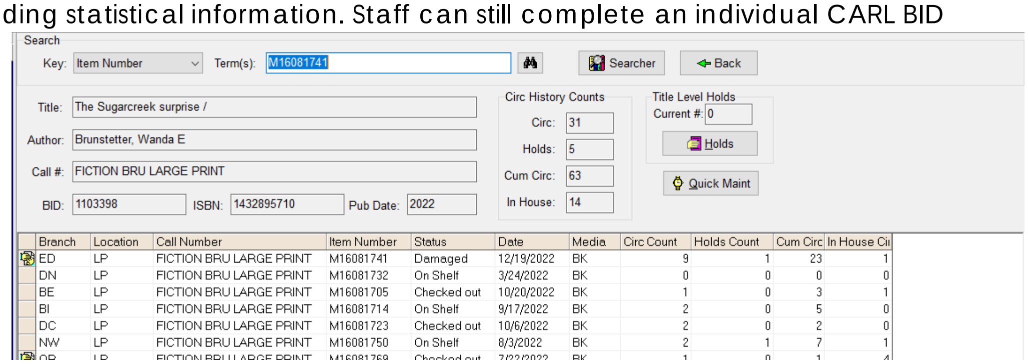
When the title is known, or even the beginning of the title, Title Browse will help quickly find it.

For example, a guest knows that they are looking for a book that starts with the title 'The house at the end…" but can't remember the rest. A title browse for that phrase (ignoring 'the') results in:



Item Number Search

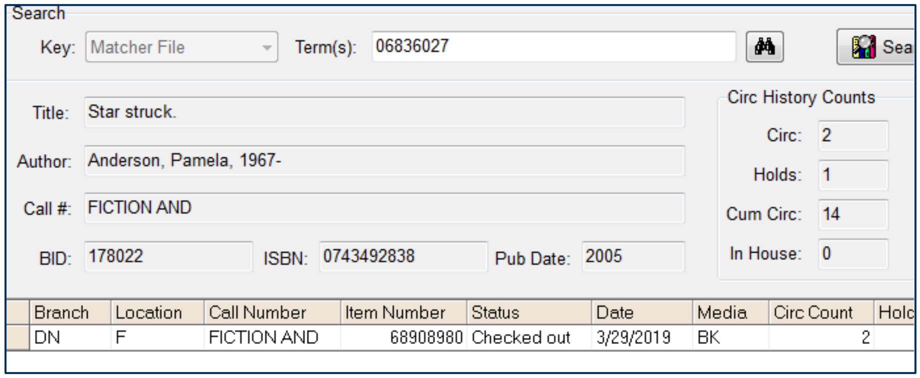
If the item number is known, enter or scan it into the search bar. It will bring up the full BID record, with the item number searched listed at the top. The BID section of the screen still shows BID level information, including statistical information. Staff can still complete an individual CARL BID search by selecting "CARL BID" as they Key.



Matcher File Search

The Matcher File search used to find the BID record for materials that were cataloged before CARL.X. Enter the BIB number, which is found on the barcode label.

A search for BIB number 06836027 shows results under BID 178022.

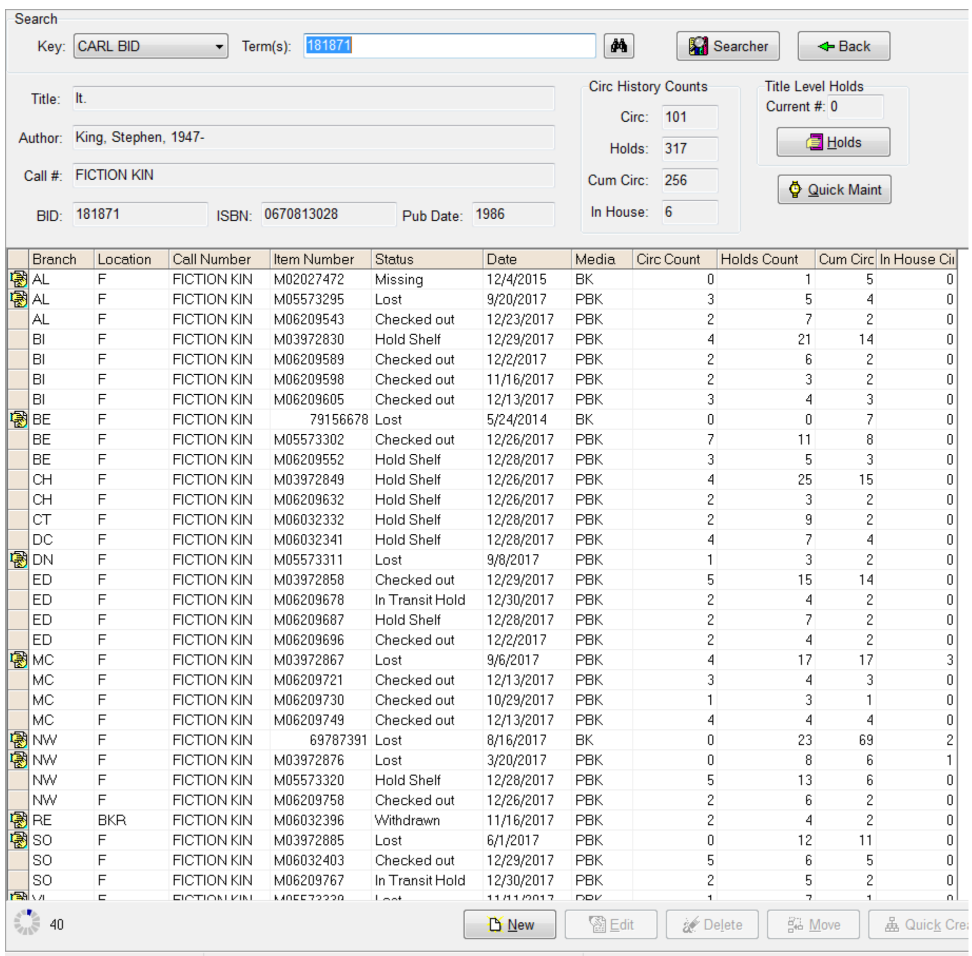


Branch	Location	Call Number	Item Number	Status	Date	Media	Circ Count	Holc
DN	F	FICTION AND	68908980	Checked out	3/29/2019	BK	2	

RESULTS OVERVIEW

Depending on the type of search you perform, you'll have different results. For most searches, your results may have many holdings listed at multiple branches under that BID.

For all searches, the top portion of the screen is dedicated to information and statistics for the entire BID, including all items that are a part of it.



Branch	Location	Call Number	Item Number	Status	Date	Media	Circ Count	Holds Count	Cum Circ	In House Ci
AL	F	FICTION KIN	M02027472	Missing	12/4/2015	BK	0	1	5	0
AL	F	FICTION KIN	M05573295	Lost	9/20/2017	PBK	3	5	4	0
AL	F	FICTION KIN	M06209543	Checked out	12/23/2017	PBK	2	7	2	0
BI	F	FICTION KIN	M03972830	Hold Shelf	12/29/2017	PBK	4	21	14	0
BI	F	FICTION KIN	M06209589	Checked out	12/2/2017	PBK	2	6	2	0
BI	F	FICTION KIN	M06209598	Checked out	11/16/2017	PBK	2	3	2	0
BI	F	FICTION KIN	M06209605	Checked out	12/13/2017	PBK	3	4	3	0
BE	F	FICTION KIN	79156678	Lost	5/24/2014	BK	0	0	7	0
BE	F	FICTION KIN	M05573302	Checked out	12/26/2017	PBK	7	11	8	0
BE	F	FICTION KIN	M06209552	Hold Shelf	12/28/2017	PBK	3	5	3	0
CH	F	FICTION KIN	M03972849	Hold Shelf	12/26/2017	PBK	4	25	15	0
CH	F	FICTION KIN	M06209632	Hold Shelf	12/26/2017	PBK	2	3	2	0
CT	F	FICTION KIN	M06032332	Hold Shelf	12/28/2017	PBK	2	9	2	0
DC	F	FICTION KIN	M06032341	Hold Shelf	12/28/2017	PBK	4	7	4	0
DN	F	FICTION KIN	M05573311	Lost	9/8/2017	PBK	1	3	2	0
ED	F	FICTION KIN	M03972858	Checked out	12/29/2017	PBK	5	15	14	0
ED	F	FICTION KIN	M06209678	In Transit Hold	12/30/2017	PBK	2	4	2	0
ED	F	FICTION KIN	M06209687	Hold Shelf	12/28/2017	PBK	2	7	2	0
ED	F	FICTION KIN	M06209696	Checked out	12/2/2017	PBK	2	4	2	0
MC	F	FICTION KIN	M03972867	Lost	9/6/2017	PBK	4	17	17	3
MC	F	FICTION KIN	M06209721	Checked out	12/13/2017	PBK	3	4	3	0
MC	F	FICTION KIN	M06209730	Checked out	10/29/2017	PBK	1	3	1	0
MC	F	FICTION KIN	M06209749	Checked out	12/13/2017	PBK	4	4	4	0
NW	F	FICTION KIN	69787391	Lost	8/16/2017	BK	0	23	69	2
NW	F	FICTION KIN	M03972876	Lost	3/20/2017	PBK	0	8	6	1
NW	F	FICTION KIN	M05573320	Hold Shelf	12/28/2017	PBK	5	13	6	0
NW	F	FICTION KIN	M06209758	Checked out	12/26/2017	PBK	2	6	2	0
RE	BKR	FICTION KIN	M06032396	Withdrawn	11/16/2017	PBK	2	4	2	0
SO	F	FICTION KIN	M03972885	Lost	6/1/2017	PBK	0	12	11	0
SO	F	FICTION KIN	M06032403	Checked out	12/29/2017	PBK	5	6	5	0
SO	F	FICTION KIN	M06209767	In Transit Hold	12/30/2017	PBK	2	5	2	0

Bibliographic information on this screen: Title, Author, Call #, BID, ISBN, Publication Date

Circulation History Counts:
This section shows **cumulative** statistical information for all items listed under this BID.

- **Circ** – the total number of checkouts since July 1st of the current year. This number resets on July 1st every year. Older data cannot be retrieved once it has reset.
- **Holds** – the lifetime number of holds placed for every item under this BID.
- **Cum Circ** – the lifetime number of checkouts for every item under this BID.
- **In House** – the lifetime number of On Shelf Returns for every item under this BID. This means the item was checked in while it had an On Shelf status. (It was browsed but not checked out.)

Title Level Holds
This shows the current number of holds on this title. This does not show Item Level Holds. Clicking on the

button will navigate to the Holds screen and populate the title information with the current title.

Grid

Item level information is found in the grid.

Branch	Location	Call Number	Item Number	Status	Date	Media	Circ Count	Holds Count	Cum Circ	In House Ci
NW	F	FICTION KIN	M05573320	Hold Shelf	12/28/2017	PBK	5	13	6	0

This is where the following information is found:

- Owning library/department
- Location code
- Call number
- Item Number
- Item Status
- Status Date
- Media code
- Item level statistics
  - Circ count (since July 1)
  - Holds count (lifetime)
  - Cum circ (lifetime circs)
  - In House Circ (lifetime in-house circs)

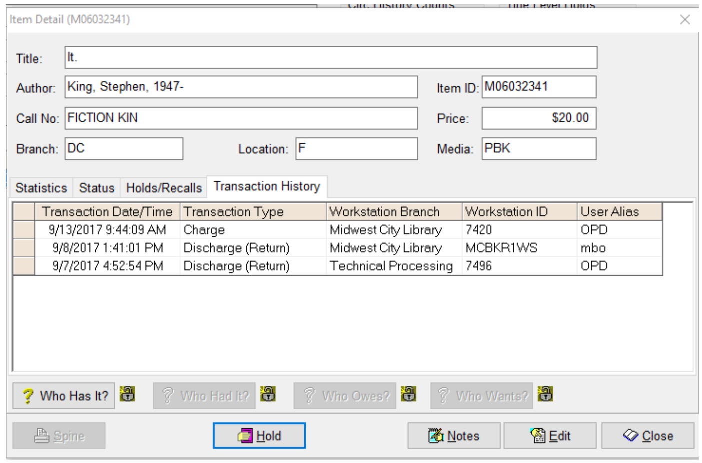
ITEM DETAIL

Double clicking on the item row will bring up the Item Detail window.

Information in the top part of the window gives some detail about the item, including owning branch and replacement cost if it is lost or damaged.

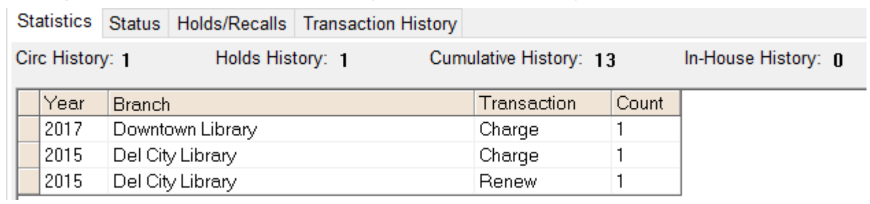
The middle of the window provides more information about the history of the item.

The bottom of the window gives actions that can be taken on the item.

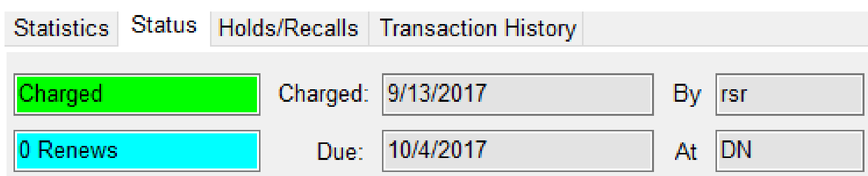


There are four tabs in item details: Statistics, Status, Holds/Recalls, Transaction Summary.

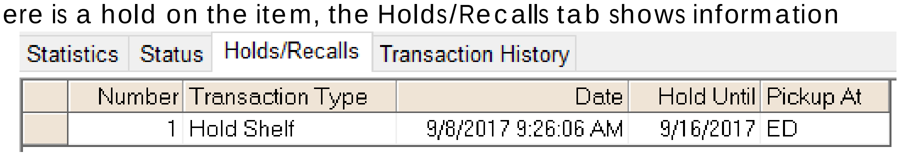
Item Statistics: The statistics tab provides statistical history for each library that has circulated that item.



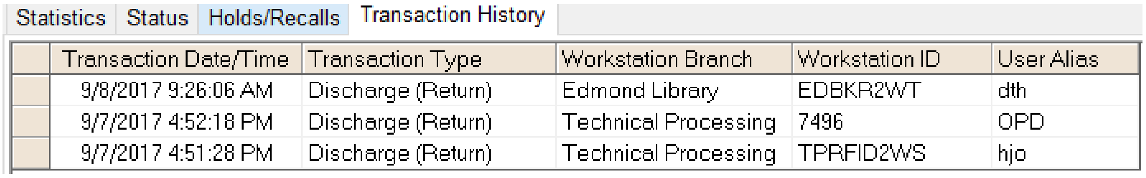
Item Status: The status tab shows information about the current status of the item. The top row shows the current status of the item (Charged, Lost, Hold Shelf, etc.) and information about dates related to that status.



Item Holds/Recalls: If there is a hold on the item, the Holds/Recalls tab shows information about the hold.



Item Transaction History: This tab gives a play-by-play account of every time it has interacted in CARL.X, but it does not show On Shelf Returns. This can be helpful when trying to track down where an item is or where it is going.

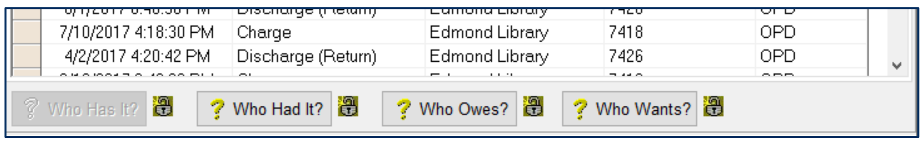


Transaction Date/Time	Transaction Type	Workstation Branch	Workstation ID	User Alias
9/8/2017 9:26:06 AM	Discharge (Return)	Edmond Library	EDBKR2WT	dth
9/7/2017 4:52:18 PM	Discharge (Return)	Technical Processing	7496	OPD
9/7/2017 4:51:28 PM	Discharge (Return)	Technical Processing	TPRFID2WS	hjo

NOTE: Workstation IDs that are numbers with OPD as the user alias are typically from a sorter, a shelf-check machine, or the tote check in. ASP user alias are payments made in Aspen Catalog.

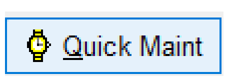
Who Actions

While in Item Detail, the following information is available via the 'Who' buttons at the bottom of the screen regarding:

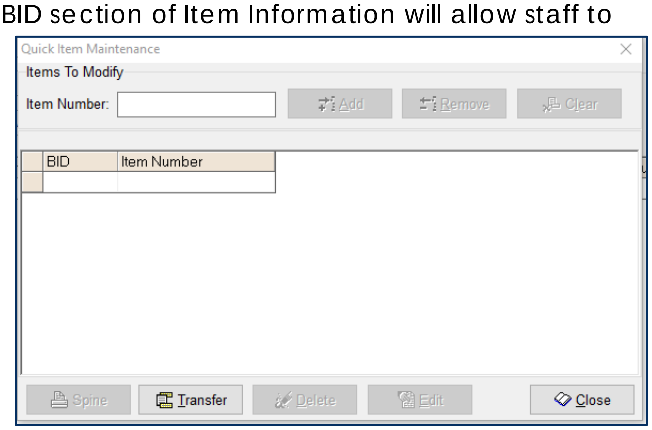


- Who Has It?
  - If it is currently checked out, this will show which account it is on.
- Who Had It?
  - If it was checked out to someone in the last transaction, this history will be available. The previous two transactions appear for the following media codes: IPAD, MOB, VGE.
- Who Owes?
  - If someone owes a fine on this title, this will show which account owes.
- Who Wants?
  - If a hold has been triggered with this item, it will show who is waiting for it.

QUICK MAINTENANCE

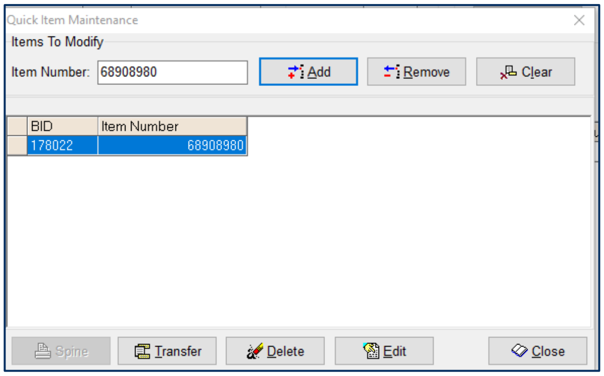
Clicking on the 

button in the BID section of Item Information will allow staff to make bulk updates to item numbers that are scanned or typed in.



When clicking Quick Maintenance, it will bring up a window to scan or enter item numbers into. ONLY item numbers here can be entered.

This is generally to make batch updates to items physically on hand.



Add – press <Enter> while an item number is in the box and it defaults to adding the number to the list.

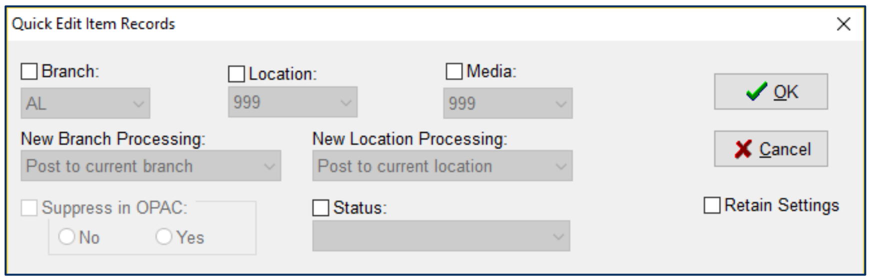
Remove – highlight the item to remove from the list to update and click Remove.

Clear – this will remove all item numbers that have been scanned or entered in the list.

Do not use Transfer or Delete.

Edit brings up the window that will allows items to be edited.

Generally, Quick Maintenance is used to edit by Location or Status. A couple of common uses are to:

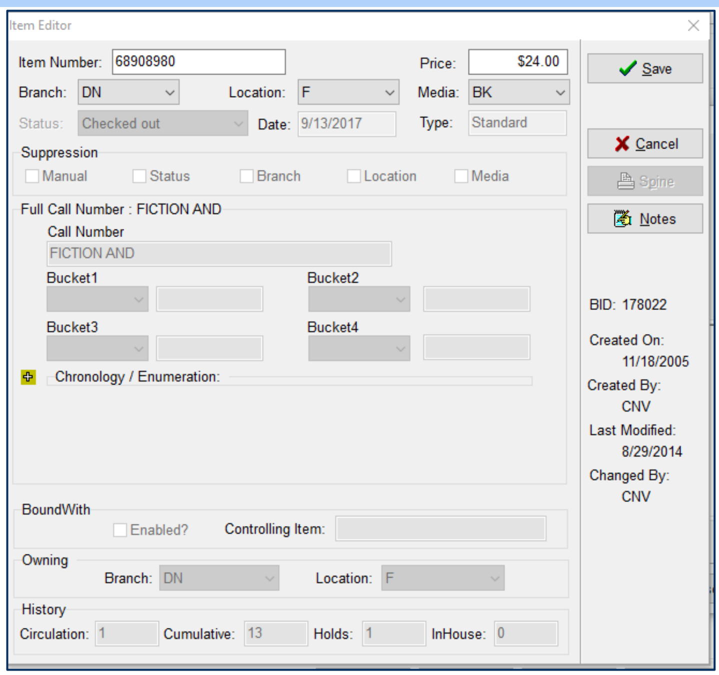


- Change the location of a group of items to a new or different location code.
- Change the Status of materials to Withdrawn during weeding.

Click **OK** to make the updates.

EDIT ITEMS

Access the Edit Item window from buttons at the bottom of the Item Information screen or from the bottom of the Item Detail window. This will bring up the Item Editor window. The parts frontline staff can edit are:



- Branch
- Location
- Media
- Status

Staff in outside Guest Services have different editing permissions.

In Transit, Hold Shelf and Checked Out statuses cannot be manually edited. The item must be checked in and On

Shelf before the status can be changed.

Location codes and Media codes CAN be changed if an item has these statuses.

STATUS, LOCATION CODE, MEDIA CODE, BRANCH CODE, AND PATRON TYPE

Review this link for the full list of statuses, location codes, media codes, branch codes, and patron types: Shelving Orientation Location and Media Code Breakdown.

Location code BKR Tip: This indicates Backroom. If the location code is set to BKR for an item, it will not fill any pending holds when it gets checked in (unless the item has a Hold Pending status)**.** Materials coded BKR must be returned to their previous location code.

Occasionally items get coded the wrong Location code or Media code; please feel free to fix them.

BRANCH PROFESSIONAL REFERENCE GUIDELINES

Branch Professional Reference (BPR) may be used in-house for programming purposes only. Here are specific guidelines that BPR will follow:

- BPR will be inventoried twice per year, following the system inventory schedule.
- BPR will have a designated area in the workroom.
    - If an item is removed from that area, it will be checked out on a staff/system card to track circulation usage. Once staff is done using that item, they will check the material back in and return it to the BPR area.
- All BPR items must be cataloged, and the record kept current in CARL.X.
- We cannot accept donations as items to add to the BPR collection. If an item is requested for a location's BPR, the request will go through Collection Development via local management team procedures.

Frontline managers will coordinate to ensure guidelines are being followed.

SYSTEM LIBRARY ACCOUNT NAMING CONVENTIONS

Each branch has system library accounts that are used for internal purposes. To make it clear what each library's system card is used for, naming conventions for system library accounts were established.

System cards are noted by using "@" and "&", depending on the purpose. Accounts with asterisks* are required for each location. Accounts without asterisks* are optional.

- The "@" symbol indicates that is it used for internal purposes and should be routed to the appropriate branch.
    - This will indicate displays, programming, or access cards.
        - A - Adult programming
        - Y - Youth programming
        - X - XAccess

        - M - [main account]
        - Xfr – Transfer *
- The "**&**" symbol indicates that it is used for internal purposes and should be handled immediately instead of routed.
    - This will include pest and withdraw cards.
        - P – Pest *
        - T – Trace *
        - W - Withdraw *

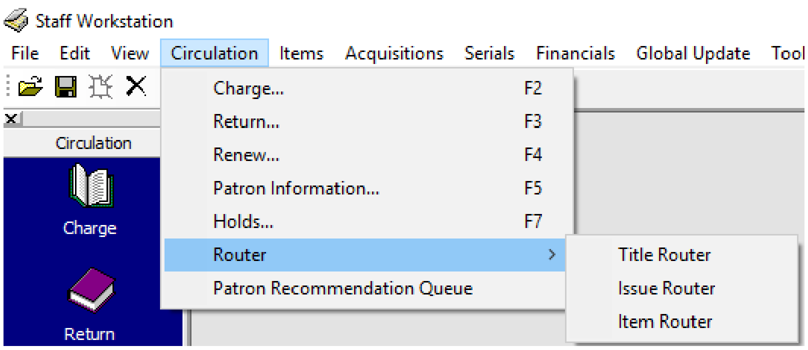
Once material arrives at the destination library, local procedures are followed to remove the "hold shelf" status. In most cases, staff will check the item out to the system card so it has a checked out status and removes it from the in transit hold / hold shelf status.

Libraries will follow this formatting to ensure the hold slip prints correctly. Under **Last Name**, the fourth letter of the hold pickup code designates the system card type. The last name can be entered as either @BEA or @BEAdult, for example, if the account is reserved for Adult Programing purposes. **First Name** will spell out the Library Name, for example, Downtown. The **Middle Name** will be "Library".

USING CARL.X TO PRINT HOLDS

If CARL.Connect is not available when it's time to search for holds, the holds list may be able to print through CARL.X instead.

1. After logging into CARL.X, go to Circulation > Router in the menu bar.



2. There are 3 lists that will need to be printed: Title, Issue, and Item.
3. The list will appear after clicking on the submenu selections for Title Router, Issue Router, and Item Router.
4. If using the Holds macro for the Title list, only manually print the Issue and Item Routers.
5. To use the Holds macro for the Title list:
    a. Log into CARL.X.
    b. Go to the desktop and double-click on the Holds WT document.
    C. Select "Start Holds". Let go of the mouse.

REPORTS

There are various reports we run to maintain account records and keep our collection current. Here is a quick reference sheet on the various reports and what they do with detailed information below.

Report Name	Frequency	Why
Holds Expired	Daily	To clear holds from accounts after they have been on the hold shelf for 7 days.
Claims Never Had	Every Wednesday	To search for items that have been coded Claims Never Had. Manually changed to missing after 4 attempts at searching.
In Transit	Every Wednesday	To search for holds that have been In Transit Hold for 7+ days.
Lost Report	Regularly, as determined by the library	To ensure lost items are being searched regularly. Should help speed up the inventory process.
Missing	Regularly, as determined by the library	To ensure missing items are being searched regularly. Should help speed up the inventory process.

HOLDS EXPIRED

Since Holds are only held for seven days, items not picked up by guests need to be removed from the Holds shelves daily.

The Hold Expired List (report #80) can be run at any time of day but should be run at roughly the same time every day for consistency. For example, it can be printed in the morning and then processed as there is staff to handle it.

1. Select your library as the Parameter.
2. Click Run.
3. When the report shows up in the left-hand list, click Transfer.
4. Click View.
5. Print.
6. Go to the hold shelf and pull each item on the list.
7. If an item on the list is missing from the shelf, mark it on the list to handle later.
8. Remove the hold slip from each item and check it in.
9. Some items will generate a new hold while others need to be returned to the owning library or your library's shelf.
    a. Items checked in will generate the 3 box Exception BRB. Select Activate Next Hold for all items.
10. Many libraries also mark materials left on the shelf after pulling expired holds. If a material receives a second mark, it indicates the item needs to be checked whether it was

checked in properly or if it is on the wrong library's hold shelf. This reduces the number of items showing up on the In Transit report. Choose a day of the week to do this every week and mark the hold slip with a different color every week (or alternate between two colors).

EXPIRED HOLDS NOT ON THE SHELF

The Hold Expired List will display the account holder information that had the item on hold. If the hold is listed on the holds expired list and is not on the hold shelf, check the nearby 4x4's to see if it was misshelved. If it is still not found, do a shelf check at your branch before contacting the guest. There is no need to call other libraries to do a shelf check with how the Tote Check In Server works.

If the hold cannot be found in the library, our next step will be to contact the guest. It is acceptable to use the title of the item when calling the account holder directly. By using the phone number on the account, we are assured of their identity.

1. Call the account holder to find out if they have the material.
    a. If they have the material:
        i. Educate them that holds need to be checked out before they take them home using the talking points below.
        ii. Check out the item to the account. No further action needs to be taken regarding steps 2-4 below if they have the item and we were able to speak with the guest.
    b. If they do not have the material and still want it:
        i. Check in the item as Damaged and update the status to missing. By checking the item in as damaged, it will move the guest to the top of the holds queue.
    c. If they do not have the material and do not want it:
        i. Open the guest's account, cancel the hold with the option "Cancel Hold" and do not notify the guest. Update the status to missing.
    d. If you are unable to reach them via phone:
        i. Leave a message and follow up with an email if there is one on the account using the general library email using the below "sample script".
2. Place a standard note on the account that says: Missing Hold Title (Item Number) called by Library on Date (ex: Missing Expired Stellaluna (78647156) called by NW on 7/5/22).
3. Place See Notes status on the account so that the account holder cannot use the self-checkout.
4. After an item has been on the expired holds list for a week, cancel the hold, code the item missing. Leave the note in place.
    a. Open the guest's account, cancel the hold with the option "Item missing from hold shelf" and check the box to notify the guest. Update the status of the missing hold to missing.
    b. Note: this can be done before the 7-day mark if you've tried to get in contact with the guest multiple times.

Sample Script

The following script should be used when communicating with guests by email or phone. The primary objective of this conversation is to communicate our desire to see their request fulfilled, while also trying to discover whether they have the item(s) in their possession.

> *Hello Name,*
> *You currently have the item "Title of Item" (item number) on hold to pick up at the Name of Library. We cannot locate this item and the hold has expired. If you have it, please let us know as soon as possible. You can contact us at "Library Phone Number" or by replying to this email. Thank you for your response!*

Go back to step #1 at the top on direction what to do after you speak with the guest.

Repeated Issues

If the guest consistently has items missing from the hold shelf or has two or more items missing at one time:

- Staff may choose to hold future holds behind the desk so that they can be educated in person.
- The note about the missing expired holds should indicate future holds will be held at the desk. (ex: Missing Expired Hold Stellaluna (78647156) called by NW on 7/5/22, future holds behind desk).
- Follow local procedures on how to identify if material should be placed behind the desk.

Once the guest has been educated, delete all notes regarding missing expired holds.

- If staff believe they are intentionally violating a rule of conduct (monopolizing library resources, theft, failing to comply with a reasonable request, etc.), leave a standard note on the account.
- Staff should report accounts with large amounts of missing expired holds or accounts who consistently fail to check out their holds to a supervisor for PITS report.

Talking Points

Use these talking points when speaking with Guests:

- Assume positive intent.
- Be positive and ask them if they received their hold.
  - For example: *"Hi, this is Brandon with the Belle Isle Library. I noticed that your holds were missing from our hold shelves, and I wanted to make sure you received the items you requested."*
  - Go back to step #1 at the top on direction what to do after you speak with the guest.
- Ask the guest if they have been using the self-checks or MeeScan.
  - Self-Check Tips:

    - Have them double check the screen and double check their receipt.
    - Scan 2-3 at a time and count as you scan the items.
    - Go back into your account to see if there are any other holds listed on their account.
- Want to be sure holds are being checked out to the correct guest.
- Staff are happy to assist the next time you are in to avoid this in the future.

A note about using the Generic Library Email

As we are sending follow up emails to guests, we should be sending them from the generic library email address. Library staff should be checking the generic library email multiple times per day. There is no need to BCC or CC library group emails or individual staff. If we are checking the generic library email several times per day, any staff member can quickly go in, response to the guest, and take action that is needed. Once the interaction is done with the guest and all action items have been taken by library staff, can the email be deleted. All emails should be responded to within 24 hours of receiving a response from the guest.

RESOLVING MISMATCHED HOLDS

The problem of mismatched holds often occurs while the branch is processing the holds list. It is easy to not notice if a book is “not charged” in the CARL.X Return screen or a slip got printed twice because an item was scanned twice. This can cause an item to end up with the wrong hold slip. Staff should pay close attention to titles and ensure that the item’s title matches the title on the slip before placing the slip in the item. Additionally, it is essential for staff to pay close attention to the CARL.X Return screen while scanning material. Staff should slow down and not rush this process to ensure hold slips are being placed in the proper items to ensure success and excellent customer service.

Below are the three most common scenarios where materials can be found with a mismatched hold slip, as well as instructions to resolving the issue.

While holds are being processed

If staff notice a mismatched hold slip while the holds are being processed, they should track down the item that belongs with that hold slip. Ideally, the two slip are swapped, and it will be an easy fix. Sometimes the problem can be larger, and staff will have to track down several items before resolving the issue. Staff should backtrack until every item has a hold slip and there are no leftovers. If staff have tracked everything down and there is an item with no hold slip, the item should be scanned again in CARL.X to see if it needs a hold slip. It could be this item was “not charged” and may be re-shelved.

A Guest brings it to Staff and says, “This isn’t what I requested.”

When this happens, apologize for the mix up, and offer to put the item back on hold.

Staff should check the catalog first to see if there is a copy on shelf at their branch.

- If there is, cancel the hold on the account and check the item out to them.
- If there is not:
    - Pull up the record in CARL.X Patron Information
    - Select the "requests" radio button
    - Find the item that matches the title on the hold slip and click "cancel hold"
    - Click yes when CARL.X asks if you want to delete the selected hold.
    - Another box will come up asking why the hold is being cancelled. Select "item missing from hold shelf".
        - The patron notification box should not be checked in this case, because they are with you.
    - Select the first option in the Big Red Box that pops up – "Cancel and place first in queue". This will put them back on the list, ahead of any others waiting for the title.

After the interaction with the individual is complete, you need to determine if there are holds for the item that was sent in its place.

- Open the Holds tab in CARL.X and search by the Carl BID (top left above the barcode).
- Once the record is pulled up, click the "Title Queue" button in the top righthand corner of the screen.
- Look through the items listed to see if any say "hold shelf".
- Double click on the item and call the branch listed under pick up. Ask them to do a shelf check for that item, both on the hold shelf and in the stacks.

In some cases, there will be multiple branches to call. If the item's hold slip does not match, the other branch will need to go through this process on their end to find where the mistake is as well.

Staff find the item on the shelf

If staff discover the item has the wrong hold slip:

- Go to CARL.X Patron information and pull up the account
- Select the "requests" radio button.
- Find the item that matches the title on the hold slip and click "cancel hold".
- Click yes when CARL.X asks if you want to delete the selected hold.
- Another box will come up asking why the hold is being cancelled. Select "item missing from hold shelf".
    - The patron notification box should be checked because the account is not aware.
- Select the first option in the Big Red Box that pops up – "Cancel and place first in queue".

This will put them back on the list, ahead of any others waiting for the title.

After putting the them first in queue, check to see if there are any holds for the item that was sent by accident.

- Open CARL.X Holds and search by the Carl BID (top left above the barcode).
- Once the record is pulled up, click the “Title Queue” button in the top righthand corner of the screen.
- Look through the items listed to see if any say “hold shelf”.
- Double click on the item and call the branch listed under pick up.
- Ask them to do a shelf check for that item.

In some cases, there will be multiple branches to call. If the item’s hold slip does not match your missing item, the other branch will need to follow this process on their end to find where the mistake is. Best case scenario, the hold slips were switched, and the issue won’t go back further. Repeat the process if it leads to more item hold slips mismatched until all items have the correct hold slip.

TRACER LIST

This is the list of items that have been placed on Trace that may be at your location. They are generally either a System trace or a Local trace. System traces are automatically generated when an item has been in transit for too long (more than 7 days). Local traces are typically not placed. Items appear on the Tracer list 3 times. After that, it is automatically coded missing if it is not checked in. Items appear on the Tracer list at 2 days, 16 days, and 30 days after being placed on Trace.

> ***Note***: *This report is an **exception** to the general rule about Reports. When run, this report updates a value that indicates how many times a Traced transaction has appeared on this report. For example, if you place a Trace on Monday and the next time you run the report is on Tuesday morning, this Traced transaction will display as a New Tracer. If you were to run the report again immediately after, this transaction would not display as it already displayed once on the report. It will not display again until it ages past the next defined Tracer Interval.*

The Tracer List only needs to be run and searched for every day IF inventory is not being done twice per year.

1. From the Reports menu, select Tracer List (report #61).
2. Set Parameter = your library
3. Click Run.
4. When the report shows up in the left-hand list, click Transfer.
5. Click View.
6. Print the list.
7. Search for each item on the list in every possible location.
8. If found, check it in. If not found, move on to the next one.
9. Materials at the end of the Trace cycle are automatically coded A9/LOSTNMISS.

CLAIMS NEVER HAD REPORT

This is the list of items that staff have marked as Claims Never Had. When marking an item Claims Never Had, it will go on the library's owning branch, not where Claims Never Had was selected. It will grow and grow unless items are checked in and marked missing. Remove items from the list and mark them missing so that the database of items is up to date and the system can occasionally be purged of items that are no longer available.

This report needs to be run weekly on the same day each week to ensure every item is searched 4 times. Every library will run this report on Wednesdays.

1. From the Reports menu, select Claims Never Had (report #62).
2. Set Parameter = your library
3. Click View/Edit Parameters
4. Set Begin date = 9/1/2014
5. Set End date = today
6. Click Save & then Close the parameters window.
7. Click Run.
8. When the report shows up in the left-hand list, click Transfer.
9. Click View.
10. If an item is located, check it in.
11. If the item has been on the list for 4 weeks and it hasn't been found, check it in and then code it Missing.

IN TRANSIT REPORT

This report will show all items that have been In Transit or In Transit Hold for more than X days. The date shown on the report is the date when the item FIRST received the In Transit status. It won't come off the list until it arrives at its intended destination. If it is located at an intermediate location and checked in, it still stays on the list until the status changes to something other than In Transit. In Transit items get traced after being In Transit for 7 days. In Transit Hold items do not get traced and stay on this list until they are processed off the list. Every library will run this report on Wednesdays.

<u>Running the Report</u>

1. From the Reports menu, select In Transit (report #11001).
2. Set Parameter = your library
3. Click View/Edit Parameters
4. Report in Transits older than = 7 days
5. Controlling Branch = Both
    a. If either "in transit to branch(es)" or "in transit from branch(es)" is selected, it will pull items for your location only
6. Branch Code = set all
7. Click Save & then Close the parameters window.
8. Click Run.
9. When the report shows up in the left-hand list, click Transfer.

10. Click View.
11. Each library has a TO tab and a FROM tab. Print both for your library.

What to do

1. Search the shelves, both the Hold Shelf as well as regular shelves for the item.
2. If found, check the item in so that the status is updated.
3. If not found and on your FROM list:
    a. Check with the owning location (check in CARL.X to find out)
    b. If still not found and it is on hold for someone:
        i. See if there are other copies in the system. If so, check the missing item in as Damaged and code it Missing. Place the account on hold for a different copy.
        ii. Per Collection Management: Check the catalog by title in case there is another BID that the hold can be transferred to. If there are no other copies available and they are last copies, staff should send the information to collectiondevelopment@metrolibrary.org. Be sure to include Title, BID# and owning library. If they are unable to replace the title, they will cancel the hold.

Note: If the item is To/From Cataloging or Collection Processing, mark it missing and put the account on hold for a different copy. If it is To/From ILL, call ILL on how to proceed. If it is To/From ED Kiosk Mitch Park (EDMP) reach out to Books by Mail/Outreach.

LOST ITEMS REPORT

This report lists all materials that are coded Lost, A9/LostNMiss, and A9/LostNPaid. This report should be run regularly at each branch to ensure lost items are being search. By completing this search regularly, it will help with the inventory process.

- Materials coded Lost are still associated with an account.
- Materials coded A9 are not associated with an account.
- LostNMiss materials have been through the Tracer process and not found.
- LostNPaid materials have already been paid for by a guest.

Please note: Once a Lost item is paid for or is no longer linked to the patron, the Who Has It button updates to A9/LOSTNPAID or another A9 status. If the item has not yet been deleted, the name of the patron who paid for the item can be found in the Item's Notes. This is automated and there is no alias tied to this.

The goal is to hopefully find materials before they go LostNPaid because if it is found after receiving that status, it means that someone was charged and paid for it, but it was really on the shelf.

1. From the Reports menu, select Lost Items (report #20).
2. Set Parameter = your library
3. Click View/Edit Parameters

    a. Start date = the last date the report was run. If it hasn't been run, start with 9/2/2014.
    b. End date = today
    c. Transaction Type = set all
    d. Branch code = your library
    e. Save your parameter settings & Close the Parameters window
4. Click Run.
5. When the report shows up in the left-hand list, click Transfer.
6. Use the Lost Items macro to format it nicely for searching and printing.
7. Mark off items not found so the next person searching knows what has been searched for.
8. If any item on the list is found, check it in. If it is A9, there is nothing else to be done. If it has a library account associated, go to that account and waive the fines.

REPORT 17

This report gives a complete inventory of your collection. This report has so much flexibility, it's the basis of several other lists you can create. This report is used to generate weeding lists, doing inventory, finding missing items, checking for miscoded items, and so much more.
This report should be used to run the missing report regularly at each branch to ensure missing items are being search. By completing this search regularly, it will help with the inventory process.

1. From the Reports menu, select Item By Status (report #17).
2. Set Parameter = your library
3. Click View/Edit Parameters
    a. Date Type = Creation
    b. Start date = the date you want to begin collecting items; typically, 1/1/1975
    c. End date = today
    d. Status Code = this will vary based on your needs. Inventory lists will include "shelf" while missing lists will include "missing"
    e. Branch code = your library
    f. Location code = this will vary based on your needs. Often selecting all is a good place to start if you're doing inventory
    g. Media code = this will vary based on your needs. Often selecting all is a good place to start if you're doing inventory
    h. Save your parameter settings & Close the Parameters window
4. Click Run.
5. When the report shows up in the left-hand list, click Transfer.

There is a Weeding Macro if you are performing inventory. If you select all on "Location Code" and "Media Code" you can filter the data in the file to find the information you seek.

RECEIVING THE MAIL/DELIVERY

Full-service libraries and community libraries send/receive daily interagency deliveries Monday through Friday; a handful of libraries also have a Saturday delivery. Access staff at most locations are responsible for unpacking the delivery boxes/black bins and separating the Holds from items being sent back to your library that were returned elsewhere. All the items belonging to your library need to be cleared so that they are no longer coded as In Transit.

While each location processes their delivery slightly differently, all materials that come in delivery must be checked in. All libraries use the Tote Check In Server (TCS) to process ergo trolleys that are delivered to libraries with a cover. The Service Center Sorter can generate a manifest with all the items that come through the sorter and drop in the ergo trolley. Once the trolley is full or is ready to be delivered to the library, Service Center staff close the manifest and place the cover on the trolley. Staff are alerted when they scan the ergo trolley bassinet in TCS and it will flag items that need a closer look.

Every library handles ergo trolleys part of the TCS differently, so talk with your library. Some libraries have their hold and non-hold material separated, so that also changes how delivery may be processed.

Some libraries receive a handful of red totes that are not part of the TCS and must be processed individually, scanning each item to clear the in transit status. When checking in Holds from red totes, it can be helpful to have 2 people working on it – one scanning the materials while the other presses ‘O’ for Place on Holdshelf. Barcode sheets with common letter presses are now available to improve the efficiency of processing delivery.

Materials may arrive in delivery that appear to have been misrouted in the delivery. Be sure to check these in as well, even if they do not have hold slips with them. They may have had their pickup location changed while in transit or had a new hold placed on them while travelling. The Service Center does not check each hold that goes through the sorter to ensure it has a hold slip.

Receiving and Shelving ILL Materials: Interlibrary Loan materials (items obtained from outside the system) arrive from the ILL office with red labels attached that have scannable bar codes. Some ILLs will have a ½ label in green or white to note the material is “in library use only” and cannot be taken home by the guest or it might indicate that the item is fragile or has multiple parts to it. Scan the bar code on the red label just as for Holds received from other libraries. (There will not be a regular bar code on the item itself since it is not owned by MLS.) Procedures for shelving ILLs vary so check with your supervisor about the process at your library.

DELIVERY REMINDERS, SPRING 2022

These reminders are to ensure driver safety and to continue to meet the condensed route schedule times.

Time

- Please be mindful of your delivery window time. The drivers are under a time crunch to make sure all locations receive their delivery as scheduled.
- Please have your designated drop off space clear of carts and/or other material.
- Make sure all materials are placed in trolleys and totes by the beginning of your delivery window.
- Please do not ask the driver to wait for material you may still be trying to process.

Ergo Trolley Covers

- With the Tote Check In System, the covers need to go back to the Service Center the next day when the drivers pick up delivery.
- Place all ergo trolley covers received the day before with the daily outgoing mail or in an area easily visible to the drivers.

Black Friends Bins

- Submit a work order if you're going to be doing a weeding project so they can keep an eye out and have black bins ready for staff.
- Be careful not to overload the black bins. This can be a safety hazard and makes the driver's work harder. Additionally, if it is overloaded, items will fall during transport. If you/your staff won't be able to move it without materials falling out, don't put the materials in the black bin.
- Be aware of how much you are pulling vs. how much space you have.
- The neater items are stacked in the bin, the more material you will fit.
- The Friends do not want bags or boxes of materials. See Guidelines for Checking Donations for Damage that took effect June 2019.
- Please do not box material unless it's during the Friends book sale.
- If your location has more than one black Friends bin, be sure to fill one up completely before putting material in the second.

Money bag and mail tote

- Please place your money bag and mail tote in the ergo trolley before the beginning of the delivery window.

Red Totes

- We still have a handful of libraries that use red totes to route material to libraries on the downline before they arrive back at the Service Center. Please ensure staff are consistent when placing materials in red totes vs ergo trolleys.
- Drivers typically check to make sure there are enough red totes. Please communicate if you need more. Ask in advance to make sure they can bring more totes the following day if they do not have extra on the truck.

- Please note: to save space, drivers may put items from the red tote in the mail tote and put them in the proper location on the truck. It is not an efficient use of space or material for them to take the tote if there are only a handful of items.

POINT OF SALE

MONEY

General cash handling information:

- Locations should not accept bills over $20.
- Locations do not make change for guests if they do not use our services.
- If you need change, follow the "Change at the Bank Procedures".
- There is no credit card minimum. Guests can pay for ANY amount with their credit/debit card.
- Staff may choose to learn about counterfeit bills through the US Currency Education Program.
- Staff may use their judgment and print a few pages for free out of goodwill for our guests or to waive fines as appropriate.

CHANGE AT THE BANK PROCEDURES

Staff are to get change at Bank of Oklahoma locations when possible. Each library has a "Cash Memorandum" pad that needs to be completed and taken to the bank with the change. Staff will have to show their staff badge and Driver's License to the teller.

If a location needs to go to the bank for change, have a second staff member count how much is taken from the drawer. Put a note in the drawer stating $x was taken for change and both staff will initial the note. Only one staff member needs to go to the bank. Once returned from the bank, two staff members will count the money to verify the amount matches the note in the drawer. The note in the drawer will be removed and discarded.

COUNTERFEIT BILLS

To reduce the likelihood of counterfeit bills:

- Locations should not accept bills over $20.
- Locations do not make change for guests if they do not use our services.
- Staff may choose to learn about counterfeit bills through the US Currency Education Program.

Please call 911 after the guest has left if you believe you have received a counterfeit bill and follow their guidance.

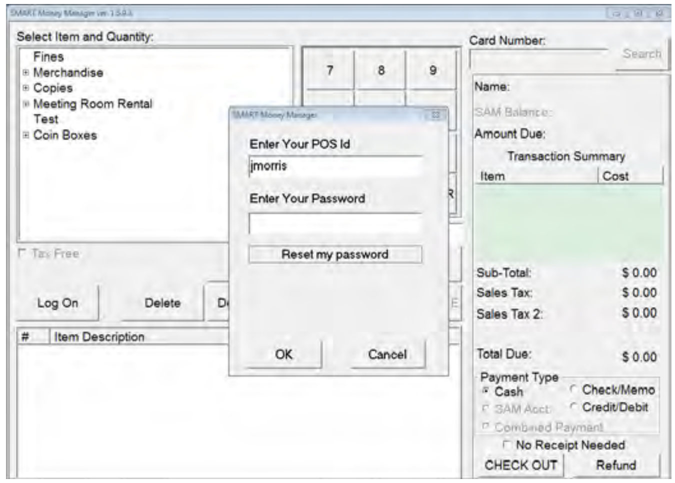
Logging In

Click the Log On button on the screen.

Your POS ID is usually the same as your CARL.X username.

The first time logging in, leave the Password field blank and click OK. The POS will prompt to create a password and set the security question.

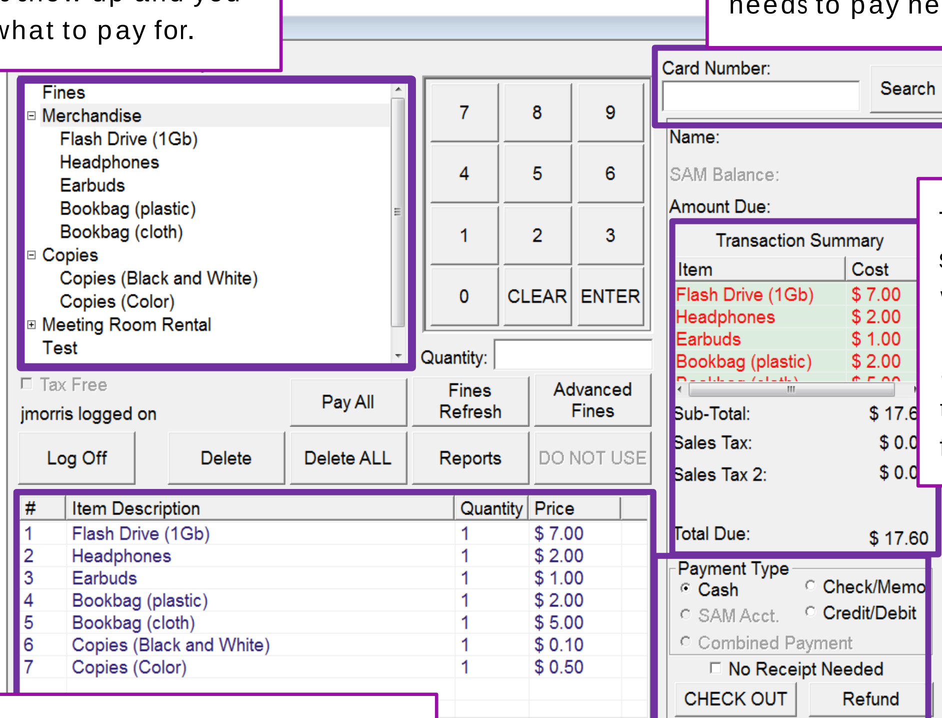
Passwords must be secure. They must be changed every 90 days and cannot be the same as the last 4 passwords used.



Understanding the POS Screen

This is where the possible charges show up and you select what to pay for.

Enter the account that needs to pay here



This summarizes what will be paid for and totals the amount for you.

Anything in this box will be paid for. To remove a line item, select it and then press 'Delete.' 'Delete ALL' will remove all of them.

This is where you select the payment type and get to payment prompts.

Paying Fines

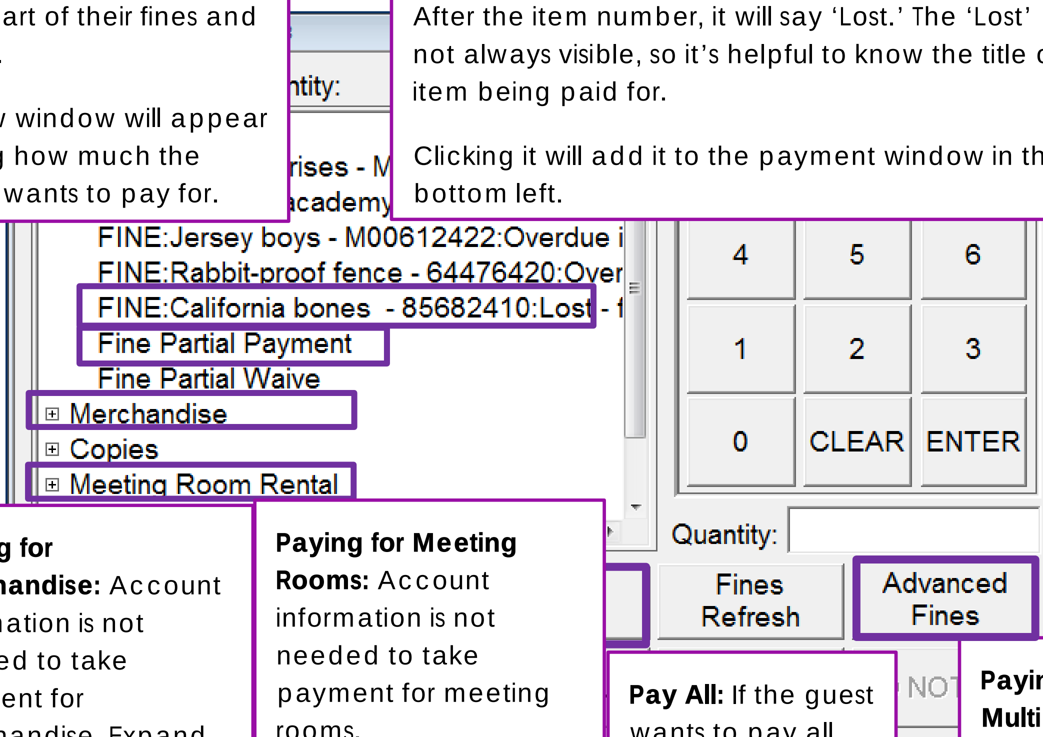
To see the charges on an account, either type or scan the account number into the Card Number field. If typing the account number (8 digits only), click **Search** to bring up the record. This is so that ECARD accounts (longer than 8 digits) can be typed into the box. The charges will be loaded into the upper left portion of the screen.

Partial Payment: use when the guest only wants to pay part of their fines and feeds.

A new window will appear asking how much the guest wants to pay for.

Paying for a Lost Item: Select the Lost item in the upper left window. It will start with FINE, just like regular fines. After the item number, it will say 'Lost.' The 'Lost' part is not always visible, so it's helpful to know the title of the item being paid for.

Clicking it will add it to the payment window in the bottom left.



Paying for Merchandise: Account information is not needed to take payment for merchandise. Expand Merchandise select what is purchased and the quantity.

Paying for Meeting Rooms: Account information is not needed to take payment for meeting rooms.

Select the requested room from the drop-down list. Look up the room reservation in the meeting room software to determine how many hours and any discounts to apply.

Don't forget to follow the proper steps to ensure the reservation software has been updated.

Pay All: If the guest wants to pay all outstanding fines and fees on their account, click the Pay All button.

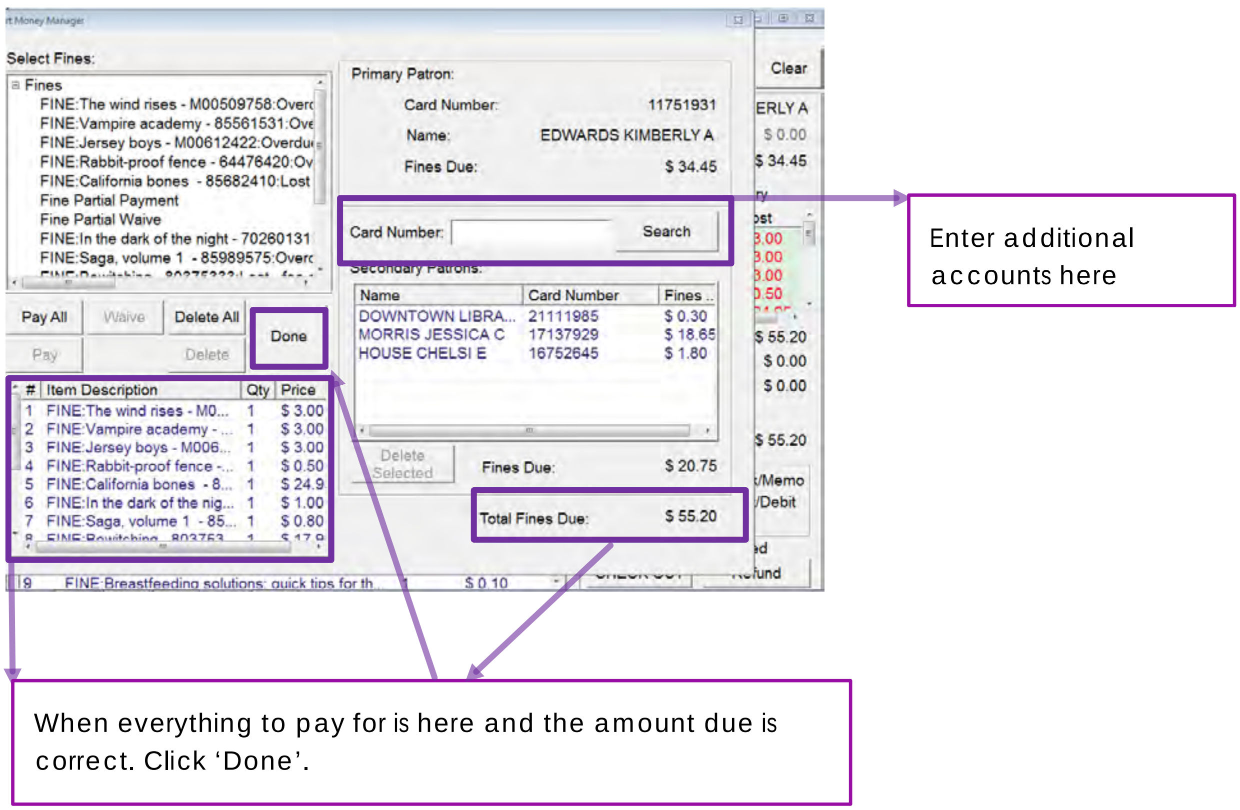
Anything that shows up in the bottom left of the screen is what the guest will be asked to pay.

Paying for Multiple Accounts at Once: Enter one library account on the main screen, select **Advanced Fines**.

See below on next steps.

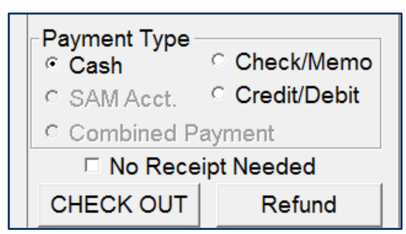
Paying for Multiple Accounts at Once

The Advanced Fines window will appear. From here, enter multiple account numbers to have all their fines and fees listed together. Pay All is still accessible from this screen. When all the fines have been added they want to pay, select **Done** to return to the main screen to complete the payment process.



Taking Payments

Note: There is a No Receipt Needed feature on the POS. If this checkbox is selected, be sure to uncheck it after you are done. This will stay checked/unchecked (however the last user left it), even when the next person logs in.



Paying By Cash

- It will ask for the amount tendered (the amount the guest gives to pay). Enter it as 0.00 format.
- Press <Enter>. It will show how much change to provide. Click **OK**. The receipt will print.

Paying By Check

- Checks are only accepted for the EXACT amount of the transaction. **No cash back is allowed.**
- If the transaction is connected to a library account, write the library account number on the check and add your initials.
- The window that appears needs the **Check Number** entered NOT the amount being paid.
- Select **OK**. The transaction will post.
- Check with your local procedures, but best practices include for staff to stamp the back of the check with the appropriate check until receipt so the Business Office can process the check more easily.

Paying By Credit Card

- A dialog box will open telling the guest to use the PIN pad to complete their transaction.
- They will need to do one of the following:
    - o Insert their card into the chip reader
    - o Swipe their card with the magnetic strip facing away from them
    - o Tap their contactless credit card on the contactless reader
    - o Waive their phone or other smart device's mobile payment system (e.g., Apple Pay, Google Pay) over the contactless reader
- Once their transaction goes through, 2 receipts will print. Keep one and give the guest the other.
- It is best practice to have the guest enter/swipe their card and select the buttons on the screen. However, if a guest is having difficulties, we would help when requested as a courtesy.

Reprint a POS Receipt

There are situations when a POS receipt needs to be reprinted. In the POS Screen,

1. On the keyboard, select CTRL + TAB
2. Select "Reprint Previous Tickets" and select the receipt based on the timestamp
3. Select "OPEN CASH DRAWER" and the receipt will print

REFUNDS

Refunds are no longer offered for Lost/Paid materials. Refunds for merchandise or copies are available. Attempt to offer an exchange of merchandise or re-printing their document for no charge before going the route of offering a refund.

1. Be sure the payment type matches the payment before proceeding.
2. Select Refund (next to Check Out).
3. Enter in the ticket number from the original receipt.
    a. If no ticket number is available, enter the library card/account number
    b. If the transaction is not associated with a library account (i.e., bad ear buds), press enter without entering an account number.
4. If multiple items are listed, delete the items that are NOT being refunded.
5. Save the receipt from the refund. Send the receipt to the BUS office the next morning with the daily deposit.

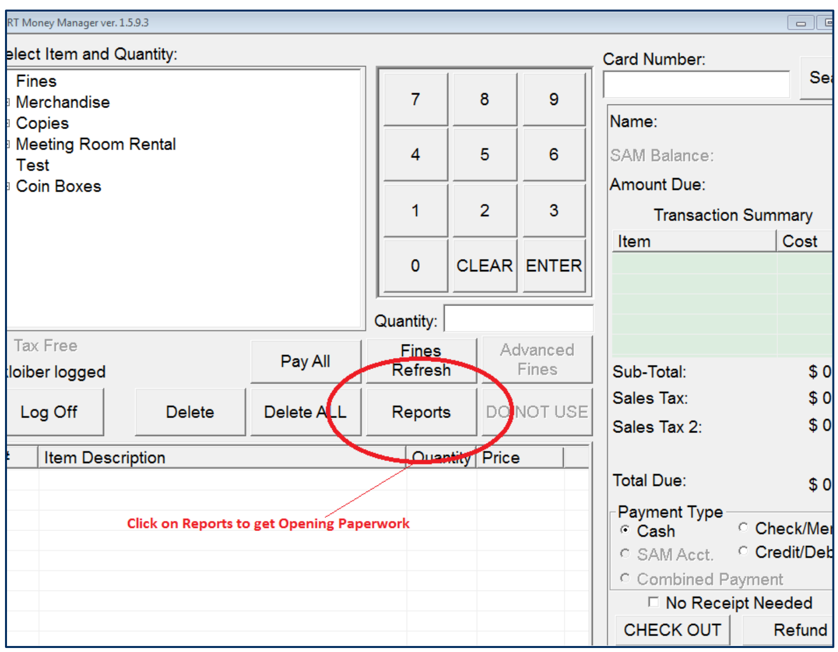
When refunding material, we need to refund to a credit card if they paid with a credit card.

If we refund a meeting room, we need to refund in the libraries to the credit card they paid the room reservation to.

DAILY DEPOSIT

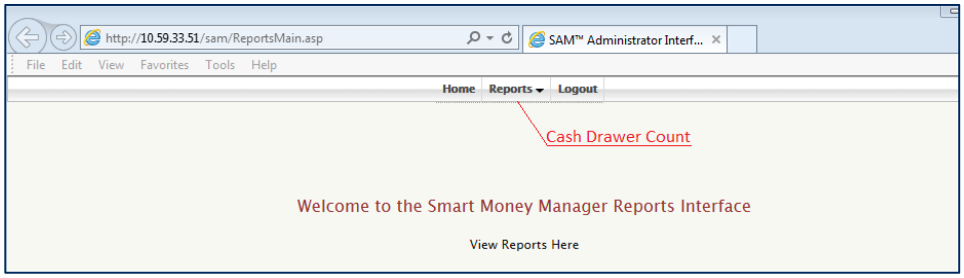
Some locations handle the deposit at closing, while others handle it in the morning. The following instructions assume that deposit is handled in the mornings before opening.

1. Take the cash drawer out of the safe.
2. Find the deposit folder from the previous day.
3. On the POS machine, print the deposit report.
    a. Log into the POS/Smart Money
    b. Click on **Reports**



    c. It will open a browser window. Click on the link in the window to open the reporting window.

d. Select Reports at the top of the screen. A drop-down menu will appear.



e. Select **Cash Drawer Count**

f. Select

i. Zone: 'your library'

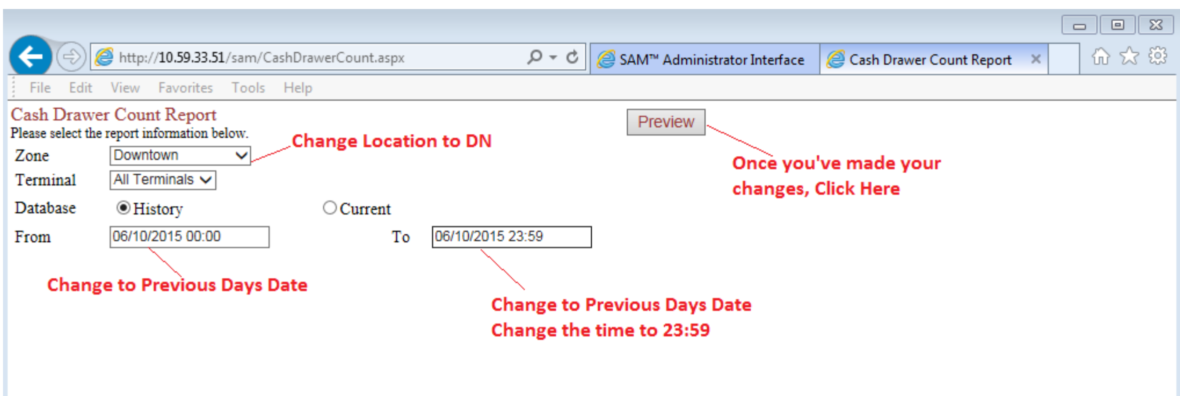
ii. Morning deposit:

1. From: Yesterday's date 00:00 (08/03/2017 00:00) (set time before entering the date)
2. To: Yesterday's date 23:59 (08/03/2017 23:59) (alternate option: set to today's date and leave at 00:00)

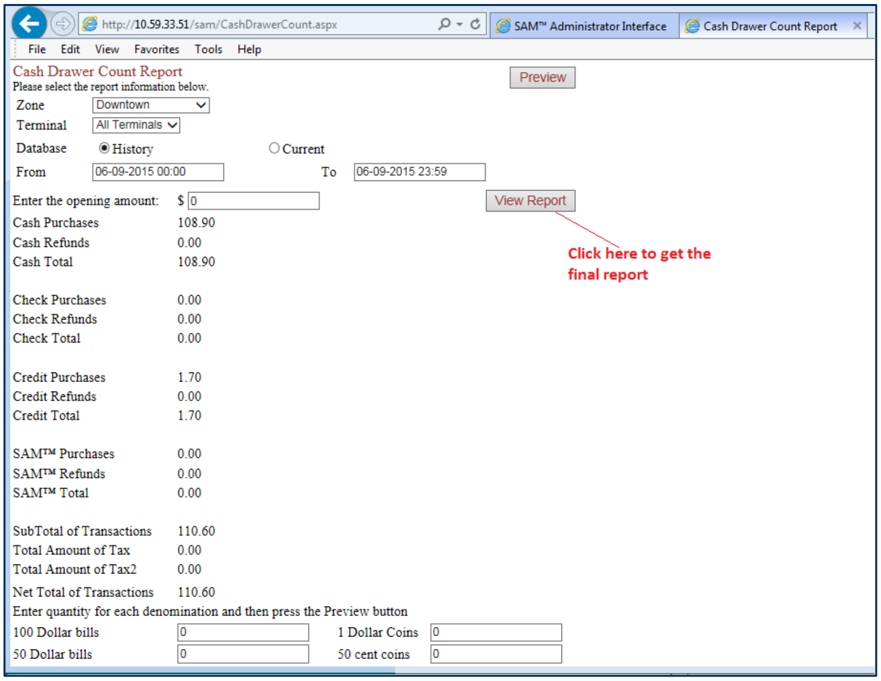
iii. Closing deposit:

1. From: Today's date 00:00 (08/03/2017 00:00)
2. To: Today's date 23:59 (08/03/2017 23:59)

g. Click **Preview**



h. Click **View Report**



i. Select File > Print to send it to the printer or use the print button inside the report window.
j. The report will display how much the deposit is under **Cash Deposits**.
k. The POS work is completed for now.

PREPARE THE DRAWER

1. Two employees are required to be present, count, and sign off on cash count procedures. If there are not enough staff to have two money counters, that should be noted on the *Cash Drawer Reconciliation*.
2. Both employees individually count the money drawer. It will equal $125 (unless otherwise noted for your location). The "Total Cash in Drawer" line must be completed on the *Cash Drawer Reconciliation.*
3. Any amount above the drawer amount will be the deposit. There is no need to count the deposit. Set aside the deposit.
   a. Our goal is to ensure the till starts with our opening amount ($125). If we have to send in less "deposit" to get to $125 we should do that. Anything over $125 goes to the BUS office, even if it's over the "deposit" amount.
      i. Frontline staff should not worry about "fixing" the deposit and opening amount. BUS will reconcile the drawer for discrepancies.
      ii. If we have to start the day under our opening amount because there is no deposit to send in, staff must notify BUS to reconcile the drawer.
   b. A note should be added to the POS report to let BUS know if we're over/under *only if you notice* as staff are only required to count out their opening till balance ($125) and send everything over to BUS.

4. When preparing the drawer:
    a. Try not to start the day with a $20 bill in the drawer. Aim to have singles, fives, and tens plus ample coinage.
    b. If there are large bills (one or more twenties or too many tens), an option is to get change (smaller bills) from a local bank.
    c. There is no need to roll excess change unless it helps staff at the location to keep a roll in the drawer. Do not send rolled coins to BUS, they will empty the roll once received.
5. Retain any credit card receipts in your location's designated area. Discard based on your local procedure.
6. Put the deposit (cash and checks) in the bag for your deposit. Make sure the deposit bag is zipped closed.
7. Both counters will sign the deposit report verifying that the procedures have been followed and the counts are accurate.
8. Place the deposit report in the folder for the previous day. Be sure to include the previous days' coin-op documentation. Do not staple any of the paperwork, all paperwork is scanned at BUS and staples may damage the equipment.
9. Put the deposit and folder (if it fits, otherwise, place in larger bag) into the locked bag, lock it, and put it in the mail bin to be picked up during delivery. On the weekend, put the folder in the designated place for your location, and put the deposit in the safe. Send the weekend deposit in on the next normal delivery day. Weekend deposits should have their own bag. Do not combine deposits from previous days into one bag. Weekend deposit bags should have a post it note/scratch paper taped or placed inside the money bag with the date that matches the POS report.
10. Money-related keys should be kept secure during operational hours. This includes in the money tray or in the safe. The safe should be locked during operational hours.

COLLECTING COIN-OP MONEY

Two employees are required to perform the following procedures.

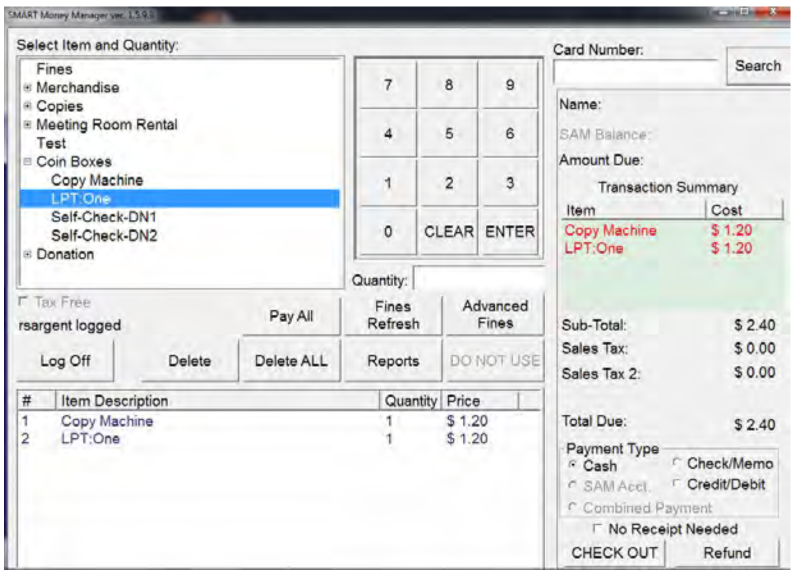
Every day, two employees will collect money from any coin-op machines for your printers and copiers.

1. Gather the keys for the coin boxes at the printer(s) and copier(s).
2. Some locations have multiple bags for collecting the coin-op money. Gather any bags or other supplies needed to carry the money.
3. Print off or pick up a copy of the file 'Copy Machine Count and LPTOne Count.'
4. The copier and printer coin boxes open with the round key. The keyhole is the lower one on the front of the machine.
5. Check for bills in the bill holder.
6. Check for coins in the change bin at the bottom.
    a. If the tubes are low, use the change in the bin to refill the tubes.
7. Place all the money in the corresponding bag.
    a. If there are multiple printers, all the printer money can all go in the same bag.

b. If there are multiple copiers, all the copier money can all go in the same bag.

Add the money from the coin-ops to the drawer as a POS transaction using the following steps. Complete this **after** the daily deposit.

1. Before using the POS
    a. Each employee individually, counts and verifies the money from the copiers.
    b. On the Copy/Printer count sheet, enter the date, your name and the amount for the copier.
    c. Each employee individual, counts and verifies the money for the printers.
    d. On the Copy/Printer count sheet, do the same for the blanks at the bottom of the
    e. There are slots for both counters to sign and verify the amounts deposited.
2. Back on the POS machine:



    a. Select **Coin Boxes**.
    b. Select **Copy Machine**. Enter the amount from the copiers.
    c. Select **LPTOne**. Enter the amount from the printers.
    d. Click **Check out**. Enter the total being added to the drawer from copier and printer money. A receipt will print.
    e. Tape the receipt to the middle of the count sheet with tape to secure the receipt. The left edge needs to be secured flat so it will feed through the scanner in the Business Office correctly.
    f. Place the forms with the receipts on them in the appropriate folder for the next day's deposit.
    g. Put the money in the till.
    h. Put the folder in the cash drawer.
    i. Put the till in the cash drawer.

TBS COINBOX RESET

To reset the TBS Coinbox for either troubleshooting purposes or to add coins to the coin tubes of the machine.

Drop the coins from the top opening on the machine, until the coinbox sends them to the reject slot. Once complete, staff will need to select the reset button.

The Reset button is the top black button on a vertical row of 4 color buttons.

LESS COMMON CIRCULATION DESK PROCEDURES

LIBRARY BY MAIL BAGS

There may be times when Library by Mail guests return their blue or purple bags to branches. The blue/purple bags have material they are returning to the library so they can get more material sent to them. There will also be a reorder form in the bag with the material. Staff have two options when they come across these bags:

- Place the entire bag and the unopened contents in the white mail totes to go back to the Service Center
- Empty the bag, check material in and reroute as appropriate, and keep the reorder form in the bag and put in the white mail tote to go back to the Service Center

DEFECTIVE MATERIAL

The definition of ‘defective’: A publisher's defect such as pages out of place, upside down printing, binding etc. This does not include wear and tear due to use.

When an item is defective and it has been received:

- Within the last 5 months, based on the date on the barcode, and has fewer than 5 circs, the item should be sent to “Service Center - Collection Services” with a note. If the item
- Older than 5 months old, based on the date on the barcode, and has 5 or more circs, withdraw the item and send to the Friends. If you would like a replacement, email Collection Development.

Findaway products (Playaway/Wonderbooks) and Vox books may be sent to DN – Collection Development if a defect is found in the first year.

STOLEN MATERIAL

There may be situations where you find A/V material in your library that you believe to have been stolen. Staff should take the empty A/V case, mark the item Withdrawn, then route to DN – CSD – GREG with a note stating the item was most likely stolen.

LOST ILLS

There may be times an account is charged for a Lost ILL.

The AM100 policy states *"materials and fines that have been on the account for 5 years or more will be removed from accounts (waived) on an ongoing monthly basis".* Regarding AM100 and Lost ILLs, if Metro has paid the owning institution for the replacement cost of the item, the guest will need to pay for the Lost ILL. ILL privledges are suspended until the Lost ILL is paid for.

If the account holder acknowledges they lost/damaged the ILL and need to pay:

1. Pay $45 at that time and be done with it. A manual fee of $45 will be added listing the description as "Lost ILL" and the ILL item number. Staff will leave the item on the account.
2. If they want to pay at a later date, they will be responsible for the full price of the item, even if it's over $45.
3. After they pay for the Lost ILL, library staff will notify Interlibrary Loan with the account holder information and ILL item number. ILL staff will process and remove the item from card.

After 60 days, when an ILL becomes Lost:

1. ILL will reach out to the owning library for the invoice.
2. ILL staff will add the manual fine to the account.
3. After the guest pays for the ILL, staff are to notify ILL with the account information and ILL item number. ILL staff will process and remove the item from card.

Checks from ILL Libraries

In the event an ILL borrowing library mails a check to MLS to pay for a lost ILL, typically the Business Office will ask the Downtown Staff to process the payment in POS.

1. Pull up the ILL Account – 02173756
2. Add a manual fine based on the amount on the invoice
    a. If the invoice has an item number, add that to the item number box
    b. Description: Lost ILL
    c. Note: Some invoices also have a $10 processing fee. That needs to be added to the account as a second manual fine.
3. Open POS and process the payment as a check
    a. Once processed in POS, put the check in the till
4. Take the receipt from the POS sale, the invoice from BUS and route them via Interoffice Envelope to "Service Center – ILL".

DOWNTOWN TOPOGRAPHICAL MAPS

The Downtown Library still circulates topographical maps, or Topo Maps, from the Downtown Library. Here are the steps to charge and return these maps.

Check Out

1. Get the **Topo Map Circulation Log Binder**
2. Place a new barcode on the interoffice envelope.
3. Enter the library card number, then scan the barcode on the interoffice envelope.
4. When the **Item Not Converted** BRB comes up, enter the following information:
    a. Item ID: Barcode
    b. Author: Topo Map, Count (example: Topo Map 5)
    c. Title: Topo Map, Count (example: Topo Map 5)
    d. Call Number: Topo Map, Count (example: Topo Map 5)
    e. **Location**: AP (this must be manually changed)
5. Then select *Create Temporary*
6. Fill out the **Topo Map Circulation Log** at the Circulation Desk.

Check In

1. Scan the barcode in Return
2. When the exception box pops up select ok
3. Open Item Maintenance
    a. Scan the barcode number
    b. Change the **status** to Withdrawn
4. Draw a line through the barcode on the interoffice envelope
5. On the Topo Map Circulation Log, fill in the Date Returned box.
6. Give the maps to the Access Manager to give to the Special Collections Manager to be shelved.

MLS WAIVERS

When guests use a MLS Studios space or check out a Library of Thing (LOT) Media Code, a waiver must be on file.

The Waiver may be found on the Access Services Documents Page under the title "Library of Things and MLS Studios Waiver". It can also be found by searching Resources > Documents > "MLS Studios LOT User Agreement".

Once guests complete the waiver, the waiver must be filed locally for the life of the waiver (3 years to the day). The name of the guest should be added to the User Agreement Waiver link found on the right side of the Access Services Documents page.

Libraries need a local process to ensure once a waiver is completed:

- Ensure names of guests with a signed waiver are added to the User Agreement Waiver at least weekly. Preferably, before Friday morning.
- Process guests off the list and shred the waiver after the waiver expires (3 years to the day)

To help staff remember to check for waivers, all LOT media code material has a charge/discharge note stating a waiver is needed. A big red box will alert staff to look in CARL to see if they are Waiver YES. If it is blank or set to NO, the guest needs to fill out a waiver before checkout of an item with the Library of Things Media Code.

Checks are performed weekly, and libraries are notified if there's an issue with the User Agreement Waiver and/or a guest is marked "YES" in CARL under "Waiver" if a waiver is not on file.

EXPERIENCE PASSES

Check Out

At checkout we will attempt to verify that the phone number listed on the account is valid. Possible scripting follows:

> *This pass can be used to admit up to x # of people per day. The pass is due back in a week. It can't be renewed and must be returned here. The overdue fines are $1 per day up to a total of $30. If it is not returned at all, a lost item charge of $60 will be applied to your account. As a courtesy, we'll reach out to you if the pass starts going overdue. Let me make sure I have a current phone number on file for you.*

Each location should be checking their experience passes in the ILS frequently so that guests can be contacted when it is overdue and that replacement passes are requested as needed.

Overdue

To assist in identifying when passes go overdue, on X day of the week, staff will check for your library's experience pass.

- If the pass is 7-13 days overdue, staff will attempt to call the customer the first time
- If the pass is 14-20 days overdue, staff will attempt to call the customer a 2nd time
- If the pass is 21-30 days overdue, staff will not attempt to call the customer but will alert the Library Manager of the pass status.

At 30 days overdue, the Library Manager will

- The Library Manager will send an email to Collection Services (Kirsten and Devin) and cc their RD with the information about the pass so that a new pass can be made and the old pass be marked unusable by the museum.
- Collection Services will work on creating a new pass.

- The RD will contact the museum to let them know that the pass number is now no longer valid.

Possible script when talking to a person:

> *Hello, this is ________ calling from the ______ library. I am contacting you about the experience pass that you borrowed. It was due on ______. Would you be able to return the item this week? It's very popular, and we would like to make it available to other customers. Since there is a $1/day overdue fine on the item until the pass is returned, we wanted to reach out to you to help you avoid those overdue charges.*

Possible voicemail script:

> *Hello, this is ________ calling from the ______ library. I am contacting you about an item that you borrowed. Please contact us at BRANCH PHONE # to let us know whether you are able to return the item this week as we would like to make it available to other customers. Since there is a $1/day overdue fine on the item until the item is returned, we wanted to reach out to you to help you avoid those overdue charges. If it is not returned at all, there will be a $60 charge associated with it to compensate for the cost of the item.*
>
> *If you reach our call center, please ask them to transfer you to the ________ library to speak with us directly. Thank you and have a good day.*

Returns

Passes are requested to be returned at the library where they were checked out. They may be returned in the book drop.

If a pass is returned that was deactivated, the old pass number should be shredded and the parts be sent to Kirsten Bryson and Devin McGhee in Cataloging for future reuse.

CHECKING DONATIONS FOR DAMAGE

Upon receiving donations at your location:

1. Offer the individual a donation receipt,
2. Take materials to the back to process, and
3. Check for obvious damage by performing quick, cursory glances at material, then
4. Place material in donation bin/boxes

It is the library's responsibility to unbox/unbag material and place in donation bin/boxes. Please do not send donations in boxes or bags material were donated in. It is acceptable to pick up a handful of donations, do a quick glance for mildew, insects, and odors then place immediately in the donation bin/box. If libraries notice a box or bag looks especially damaged, they may be more cautious when placing material in donation bin. However, libraries should not be inspecting donations as thoroughly as when checking library material for damage. If there are donations in poor condition, they may be discarded locally in the dumpster.

Locations may accept no more than three sturdy boxes of donations from one individual. If there is a sizable donation, staff may ask them to drop them off at the Service Center on Tuesday, Wednesday, and Thursday mornings from 9am-12pm.

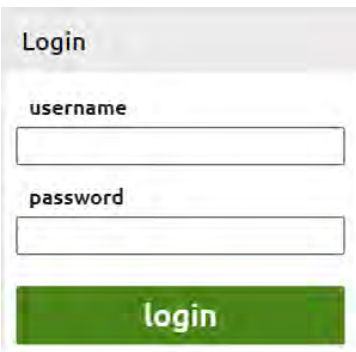
As a reminder, all items being donated to the library are automatically property of the Friends of the Library and will not be added to the library's collection. More information about donating materials to the Friends of the Library.

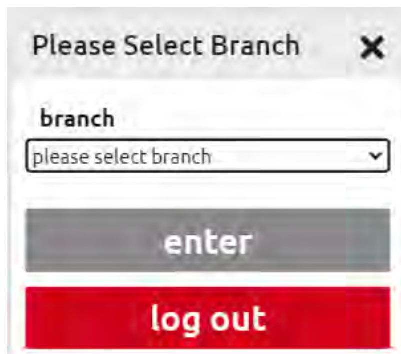
CARL.CONNECT

CARL.CONNECT: GETTING STARTED

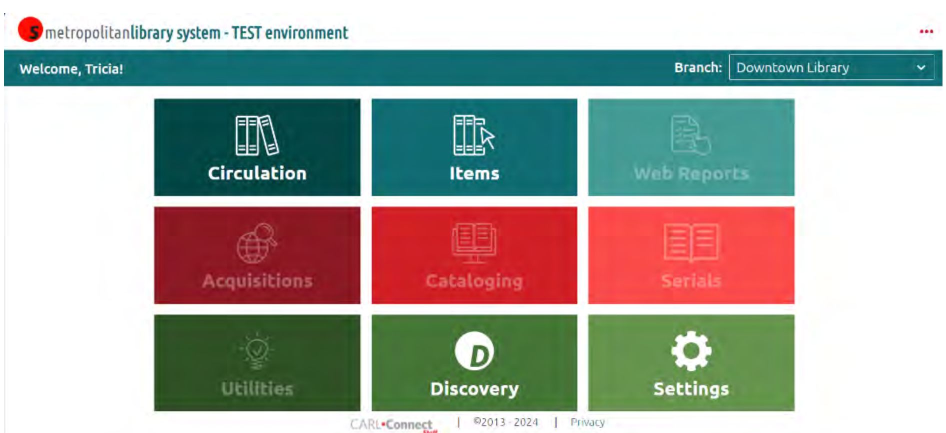
Logging In

Go to https://mls.carlconnect.com or select CARL.CONNECT from the Intranet Logins menu. Enter the appropriate CARL.X username and password and select the appropriate library when prompted. Users can log in as any branch, even if you are not physically stationed there.





You will then need to click on the dashboard button to which module you want to be taken to.



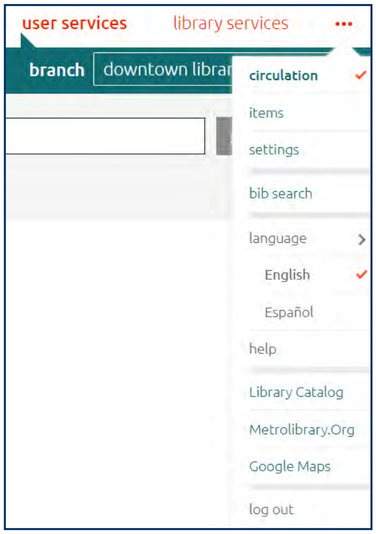
- **Circulation** navigates to the Circulation module.

- **Items** navigate to Item Maintenance.
- **Discovery** navigates to the CARL catalog.
- **Settings** navigates to staff preferences for your login.

There are other module options, however, they are currently in development with TLC so permissions are turned off for staff.

Drop-Down Menu

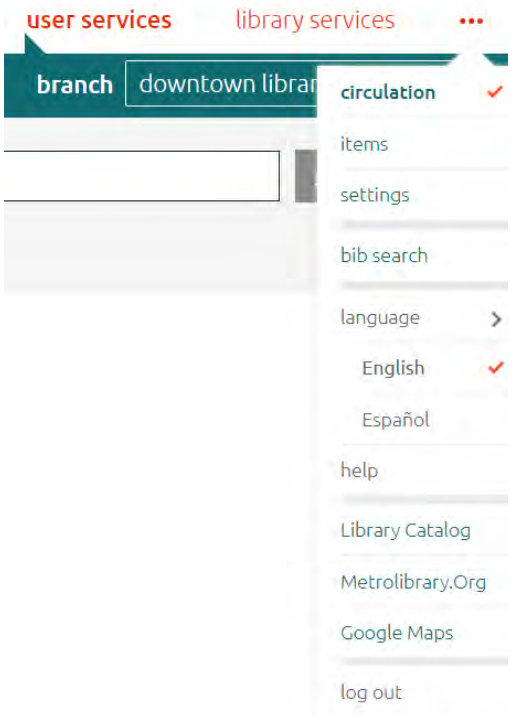
Clicking on the 3 dots (aka meatballs) in the upper right corner will show a drop-down menu with more options.



- Navigate between Circulation, Items, and Settings
- Access Bib Search
- Select the language
- Access Help
- Quick Links for
    - Library Catalog
    - Metrolibrary.org
    - Google Maps
- Log out

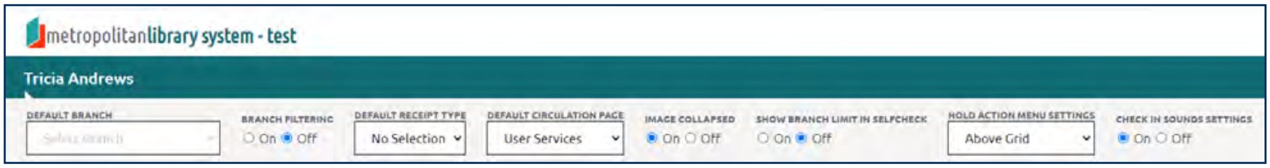
Logging out

Click the 3 red dots (aka meatballs) in the upper right corner. Select Log Out from the drop-down menu.



SETTINGS

This provides access to settings and preferences specific to the user's login.



Default Branch – This will set which login branch is selected without having to select the drop-down on the login screen.

Branch Filtering – This radio button toggles whether Branch Filtering is checked by default when searching for accounts. (Recommended setting is **off**.)

Default Receipt Type – This selector determines the default type of receipt that is offered under the user's login: Email, Text, Print, All, No Selection. 'No Selection' means that the user will need to select the receipt type for each transaction. All receipts are confirmed to be working.

Default Circulation Page – This selector sets whether User Services or Library Services is the landing page when logging in.

Image Collapsed – This radio button changes whether the placeholder for a patron image is visible when looking at the User Information screen. (Recommended setting is **on.**)

Show Branch Limit in Selfcheck – MLS does not currently use this feature. (Recommended setting is **off.**)

Hold Action Menu Setting – Staff may either select "Above the Grid" or "Within the Grid" to determine how the hold actions will show in the fill list.

If staff select "Above the Grid" – multiple items may be selected and the action can be taken for multiple items at one time.

If staff select "Within the Grid" – action will need to be taken on each item individually.

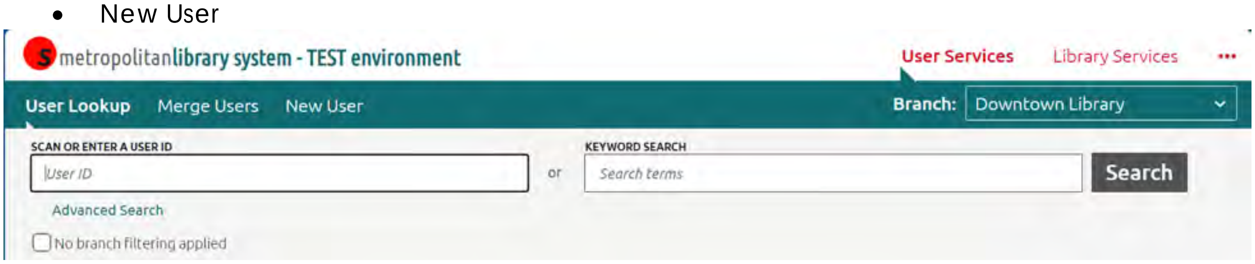
Check In Sound Settings – This radio button toggles whether sounds are made at check in after items are scanned. (Recommended setting is **on**.)

Save Settings – Once a change is made on the Settings screen, the **Cancel** and **Save Settings** buttons appear.

CARL.CONNECT USER SERVICES

Options in CARL.Connect User Services include:

- User Lookup
- Merge Users
- New User



Let's take a look at each one.

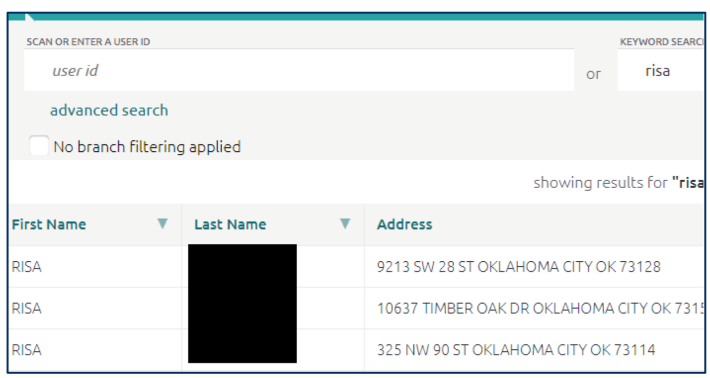
USER LOOK UP

In **User Lookup** or **Check Out**, the Keyword Search allows searching by name, sponsor name, address, or phone number. *If the search results are unsuccessful, make sure Branch Filtering is turned off.*

The results screen will not display middle names or suffixes, so take additional care to verify which family member is present if multiple people in the family have the same name.

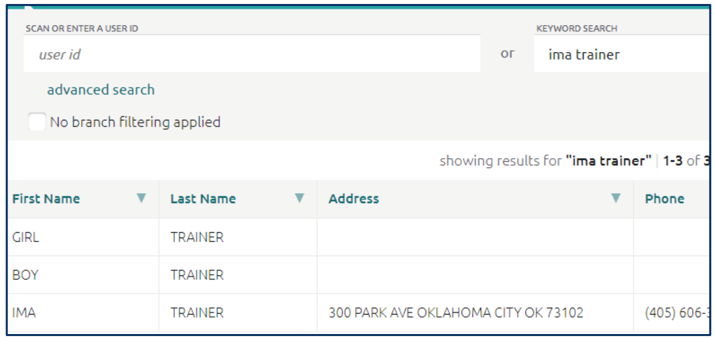
Patron Name Search

Searching by a single name brings up all results with that name. Both first and last names can be used together to search as well.



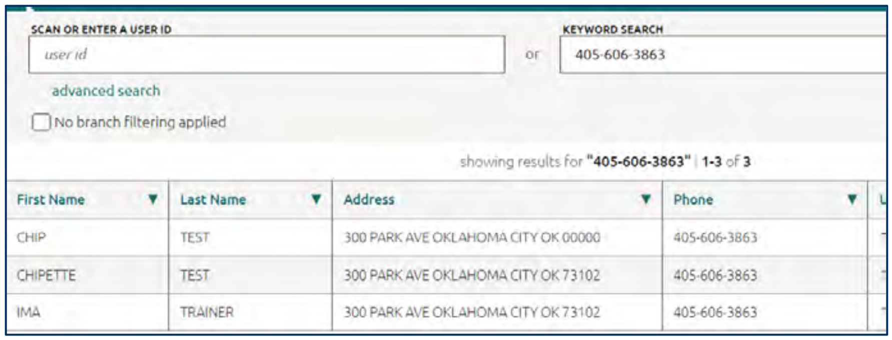
Sponsor Name Search

The accounts without the address listed have the keyword search term as the Sponsor Name.



Phone Number Search

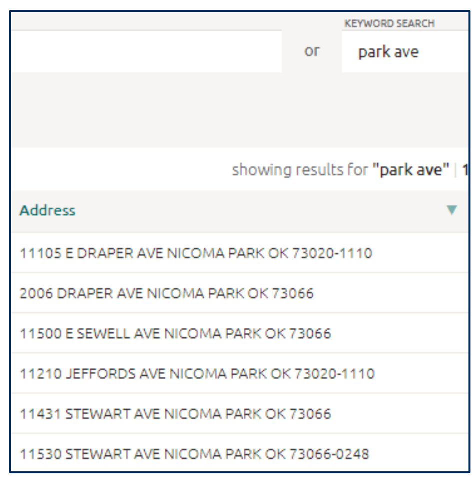
The formatting of the phone number matters in this search because it must be an exact match with no spaces. If there are spaces in the stored phone number, you will not get a match. As a reminder, all phone numbers should be entered with dashes.



Address Search

Keywords will allow for the address field to be searched from the main search box. The address field can also be searched using the Advanced Search option shown below.

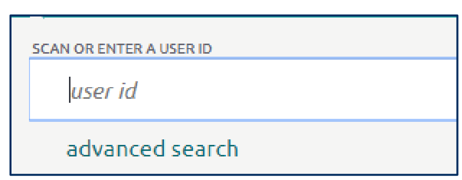
It shows results matching either word though, so a search for “Park Ave” pulls up every Nicoma **Park** address that has **Ave** in the street name.



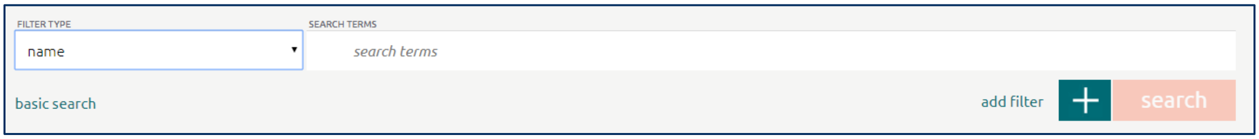
Advanced Search

The button for the Advanced Search screen is under the User ID search.

Advanced Search enables searching by up to 10 different filters. Currently available filters for our libraries are: keyword, phone, name, address, email address, date of birth, and your logged in branch.



The filter selections are on the left side of the screen. Add filters by clicking the blue + button on the right side of the screen.



Searching with Wildcards

CARL.Connect uses * as a wildcard. Replace any single letter in the middle of a word or place the wildcard at the beginning or end of the word.

- Me*ghan will find both Meghan and Meaghan

*metrolibrary.org will find all accounts with email addresses ending with this domain

MERGING ACCOUNTS

Merging accounts only occurs in CARL.Connect.

1. If checked, uncheck the box "You are searching: X Branch."
2. Click on "Merge Users" near the top of the screen.
3. You will perform a Keyword Search for the person's name or enter the account number of the card you want to keep. This will be your "primary card".
4. Once the primary account is selected, you will perform a Keyword Search for the person's name or enter the account number of the card you want to be merged into the "primary" card. This will be the "secondary card".
5. Make sure the primary account is on the top.
6. Click green button at bottom labeled "Merge Users."
7. If notes were attached to the accounts during the creation of an Ecard or that note of a duplicate account, delete the note(s) and change the account status to "Good."

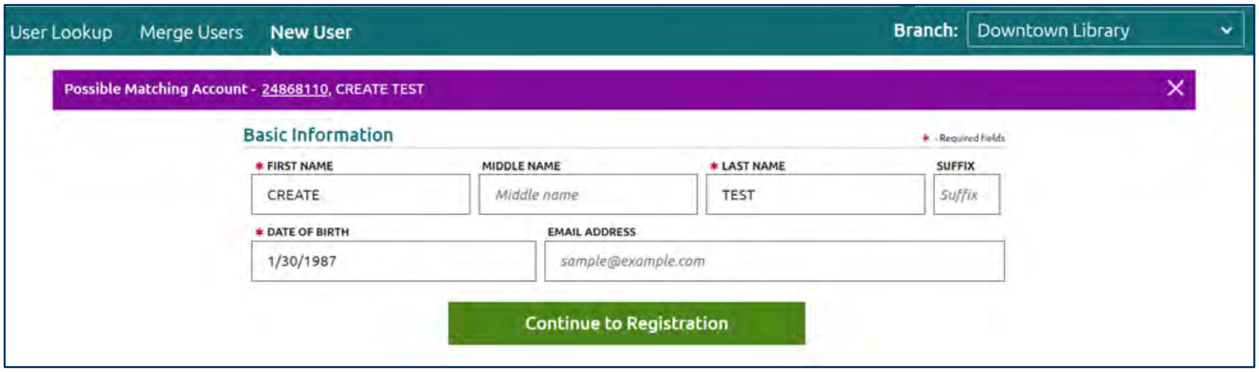
NEW USER

When creating a new account, start with **New User**. This will search to see if the user has an account already before creating the account.

When searching here, the required fields are First Name, Last Name, and Date of Birth. Use ALL CAPS for the name and lowercase for emails (unless told to use mixed case for the email).

Click the green **Register** button to move forward.

If a possible match is found, it will provide an alert with a yellow box above the Basic Information:

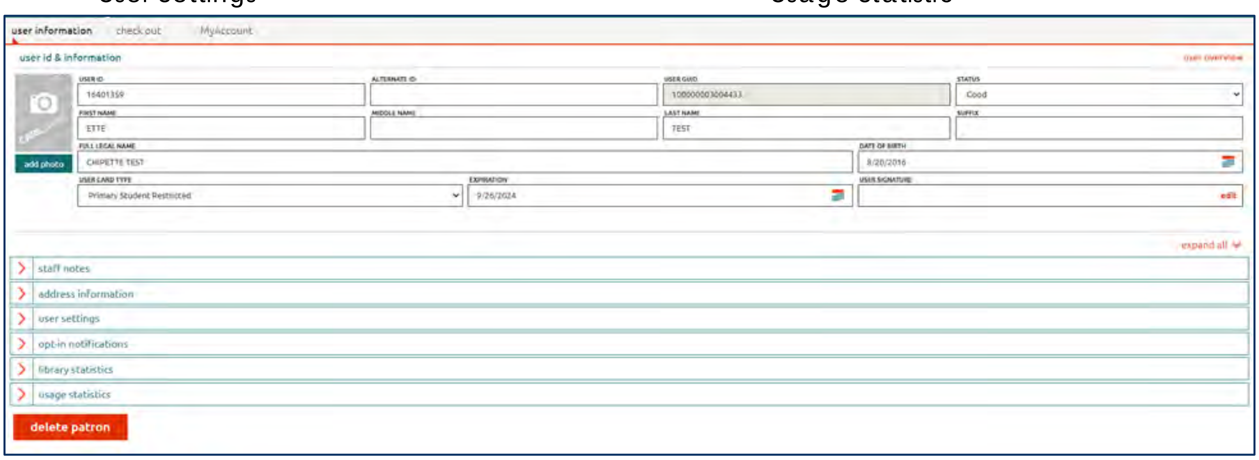


Even if a possible matching account is identified it is possible to move forward with registering a new account by selecting **Continue to Registration**.

ENTERING ACCOUNT INFORMATION

There are multiple sections that need to be completed:

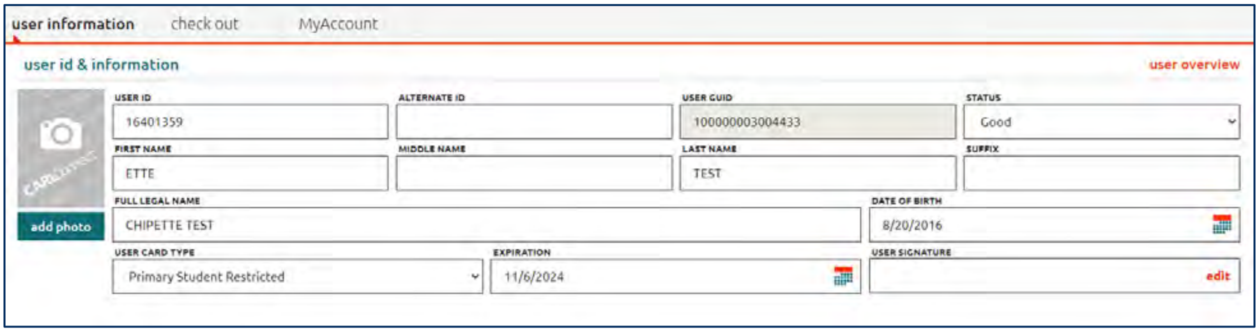
- User ID & Information
- Address Information
- User Settings
- Opt-in Notifications
- Library Statistics
- Usage Statistic



Let's take a look at each section.

User ID & Information

The User ID & Information section provides basic information about the user.



- **Photo** – not used by MLS
- **User ID** – library account number
- **User GUID** – this number stays constant even if the account number changes. It ensures that accounts remain unique. It cannot be changed.
- **Expiration** – upon saving, it will populate with the correct expiration date based on the User Card Type.
- **Status** – Indicates the account standing.
- **Name** – First, Middle, Last, Suffix
- **Full Legal Name** – This is a searchable field in CARL. The field should only be used if their preferred name is different than their legal name on their Identification. The name on the guest's ID should go into the *Full Legal Name* field with their preferred name in *Name.* This field is searchable, however only the preferred name will show up in the search results. This field should be entered as FIRST MI LAST.
- **Date of Birth**
- **Alternate ID** – this is not used by MLS
- **User Card Type** – Account type
- **User Signature** – not used by MLS
  - Clicking anywhere in the line for the **Edit** button opens the option to enter a signature for the account.

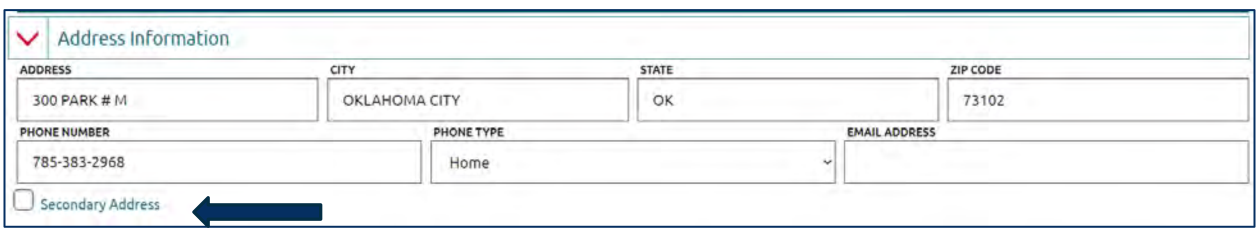
Staff Notes

If an account has notes on their account, they will automatically expand when you open their account. Urgent notes from CARL.X (red) will float to the top of the notes list. Staff can collapse notes once read. Any existing notes display by default when you access the User Information screen. Notes display the 3-character alias of the creator or editor of the note and the date the note was created or edited.

- **Collapse / Expand Notes** – Selecting the arrow on the left will either collapse or expand notes
- **Add A Note** – This expands the section to add a note. Only Standard Notes are currently available to add from CARL.Connect. After clicking ‘Add a Note’, the section expands to show a text box where you can enter the Note Text.
- **Save a Note** – Typing in the Note Text box makes ‘Save Note’ available. When saving the note, no special dialog appears. The new note just appears in the Notes section.
- **Delete Notes** – To delete notes, select the ‘X’ at the end of the row that you want to delete. A dialog box will ask you confirm you want to delete the note.
    - **Cancel** will return you to the User Information screen without deleting the note.
    - **Continue** will delete the note. After deleting the note a confirmation message will appear at the top of the screen.

Address Information

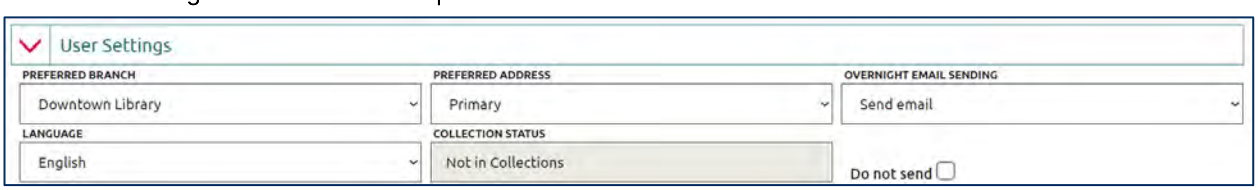
The Address Information section includes Primary Address fields as well as fields for Contact Information (phone number, phone type, email address).



- Checking the **Secondary Address** checkbox will expand the area to enter a non-primary address.

User Settings

The User Settings section sets user preferences.



Available settings are:

- Preferred (default) Branch

- Preferred Address (Address Type)
    - None – do not use
    - Primary
    - Secondary
    - Sponsor (by selecting this, the address type changes the Secondary Address area to Sponsor Address.
        - **NOTE:** Student and Student Restricted Accounts: change the Preferred Address under User Settings to Sponsor. Go back to Address Information, check the box Sponsor Address to add sponsor information.
    - Care/of
- Overnight Email Sending
    - Do not send email
    - Send email
    - Bounced email
    - Opted out
- Language
    - English/Spanish
- Collection Status
    - This refers to financial collections and is not a feature used by MLS. The Do Not Send checkbox refers to this (not email)

Opt-In & Notifications

Options listed are: Email Receipts, Text – Coming Due Notices, and Text – Hold Shelf Notices.

Text and email options are read-only fields until the phone type is set to a cell provider or an email address has been entered.

- To opt in to email *notifications*:
    - Under Address Information – 'Email Address' cannot be blank
    - Under User Settings – 'Overnight Email Sending' must be set to 'Send Email'
        - This is where the opt in option for to email <u>receipts</u> is located.
- To opt in to text *notifications*:
    - Under Address Information
        - 'Phone Number' cannot be blank
        - 'Phone Type' must be the cell carrier
    - Under User Settings

Set 'Coming Due' and/or 'Hold Shelf Notice' to 'Yes'

Library Statistics

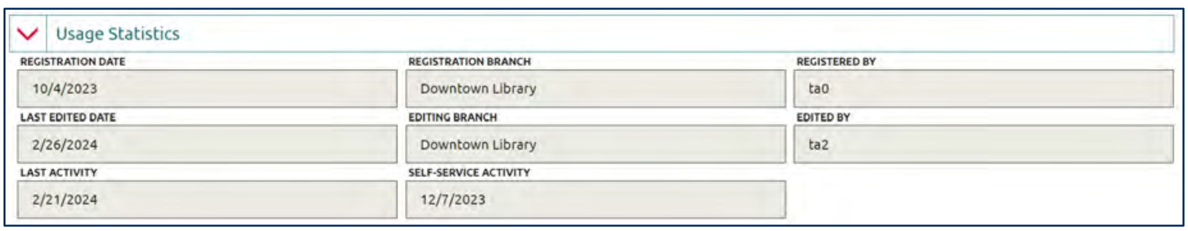
Library Statistics are fields in CARL.X that are User Defined Fields specific to MLS.

- Waiver – Yes/No, will be utilized with MLS Studio and Library of Things library staff only
- IT Use Only – Yes/No, will only be used by IT Department.

Usage Statistics

Usage Statistics are the same information found in CARL.X under Patron Information > History > Statistics. These are accessible only after the user has been registered.

- **Registration Date** (date the account was established)
- **Registration Branch** (location the account was established)
- **Registered By** (3 letter code for who established the account – CNV means Conversion from previous system; ECA means online registration)
- **Last Edited Date** (last date changes were made to User Information)
- **Editing Branch** (location where changes were made)
- **Edited By** (3 letter code for who edited the account)
- **Last Activity** (last time the account had circulation activity)
- **Self-Service Activity** (last time the account had logged into a self-check machine)



Copy User

Once the User Information has been saved, the Save button disappears and a 

button appears at the bottom.

Staff will need to enter the User ID, First Name, Last Name, Date of Birth, and select the appropriate User Card Type.

Once complete, select "Create New User". The page will navigate to the full User Information screen to add additional data.

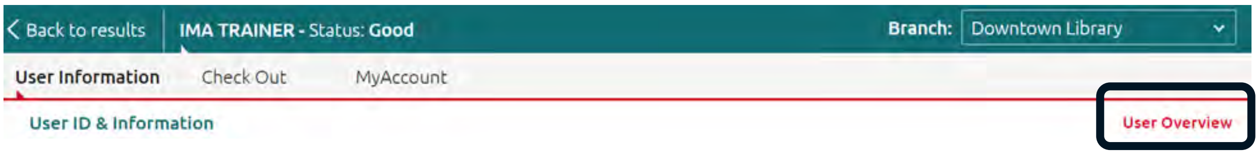
Please note: Copy User does NOT check to see if the user is already in the system. Staff must do a search first to confirm the new user does not already have an account.

Fine History

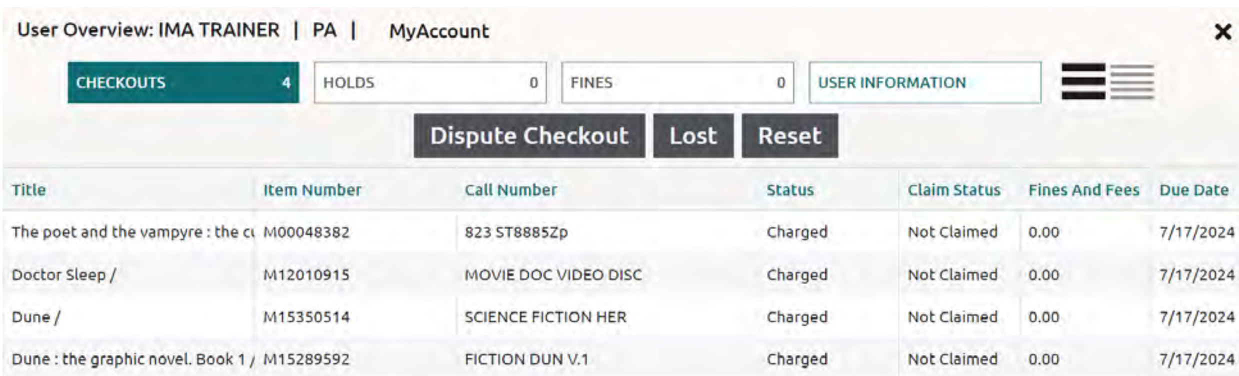
Current account fines and fine history are available through the **MyAccount** link. Staff can waive and cancel fines as well as view fine history here.

USER OVERVIEW

User Overview is available on most CARL.Connect screens.

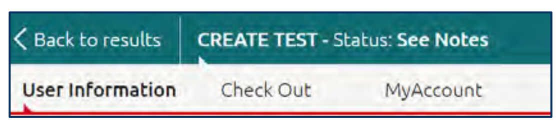


Under checkouts, staff can mark items "Dispute Charge" (Claims Never Had) or Lost.

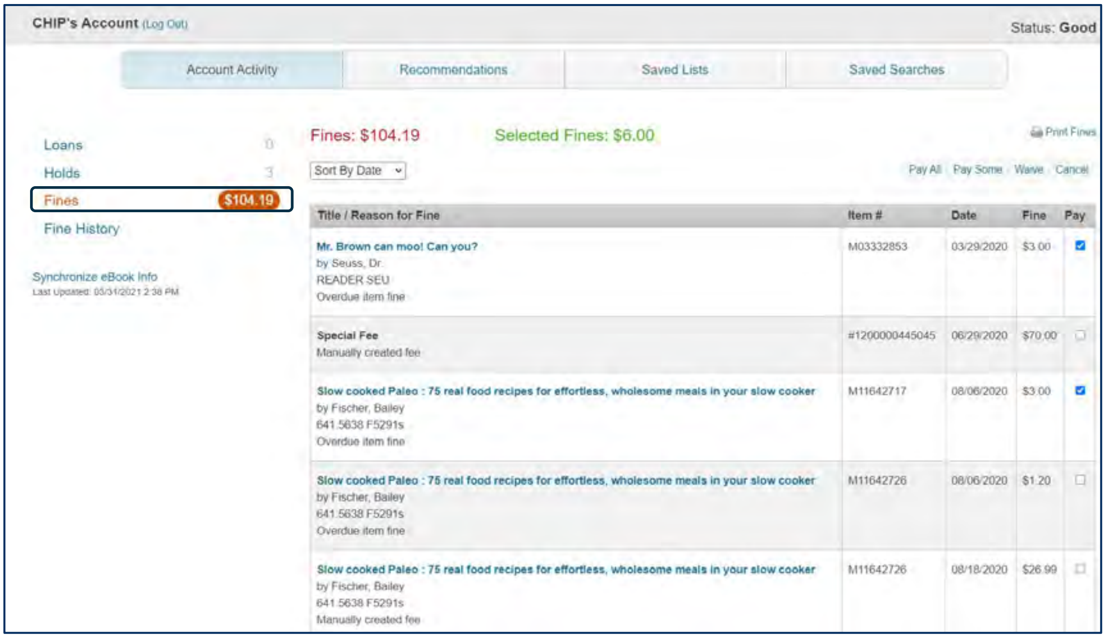


WAIVING AND CANCELLING FINES

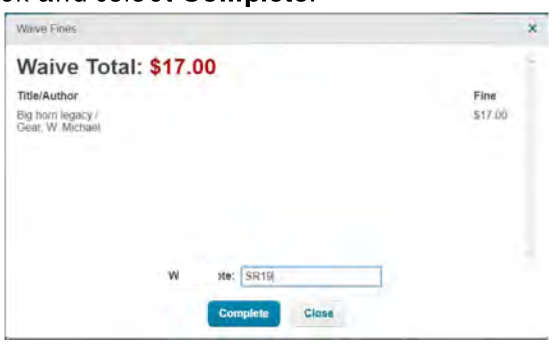
From any screen where MyAccount is available, select **MyAccount.**



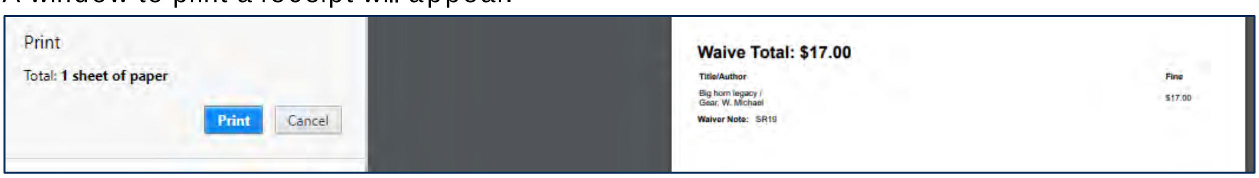
Select **Fines** from the left menu. The fines will be displayed. Select a specific fee or multiple fees to **waive** or select the ‘select all’ checkbox at the top.



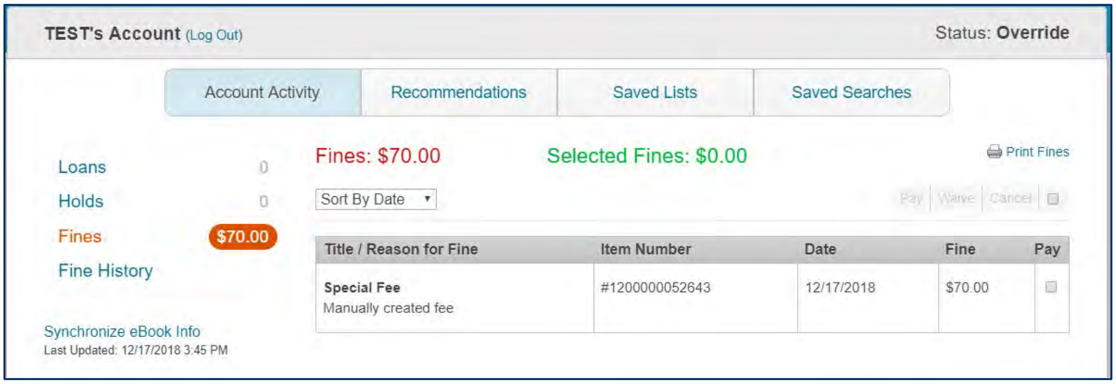
A waiver dialog box will appear. Enter the waiver reason (educated, goodwill, illness, inclement weather, or employee). Click and select **Complete**.



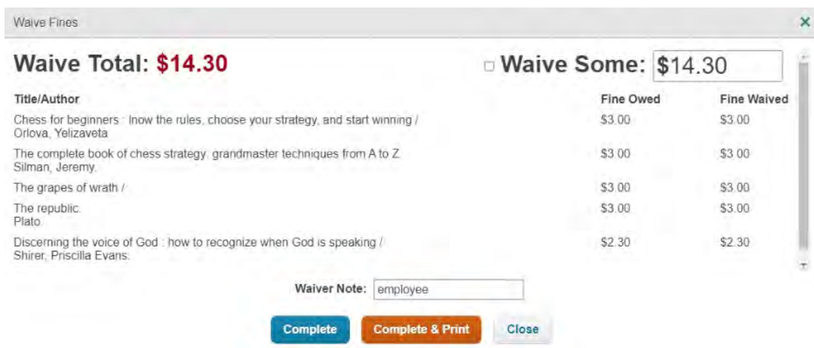
A window to print a receipt will appear.



Choose **Print** if the individual wants their receipt or **Cancel** if a receipt is not needed. The account is updated in real-time.



Staff do have the option to do a partial waive in CARL.Connect. Staff will select "Waive" then when the box displays, check the "Waive Some" box and enter the amount to waive.



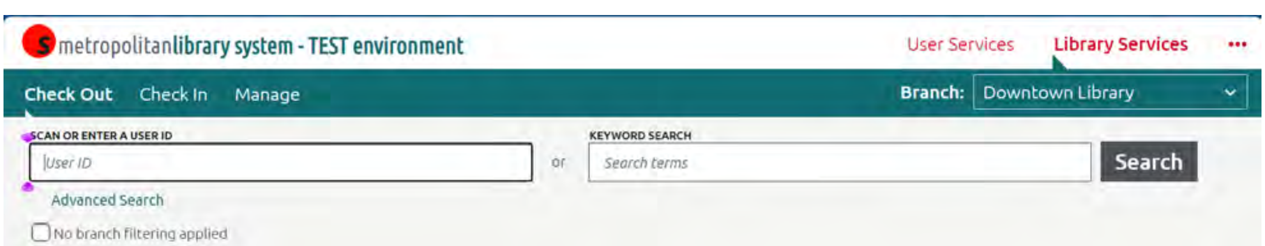
As a reminder, we do not "Pay" fines in CARL.Connect, we only waive, partially waive, or cancel fines. Point of Sale is the primary method of payment for guests.

Cancelling fines in CARL.Connect works similarly to Carl.X. You will want to highlight the fine to cancel, then select cancel. It will cancel the full amount of the fine.

CARL.CONNECT LIBRARY SERVICES

Options in CARL.Connect Library Services include:

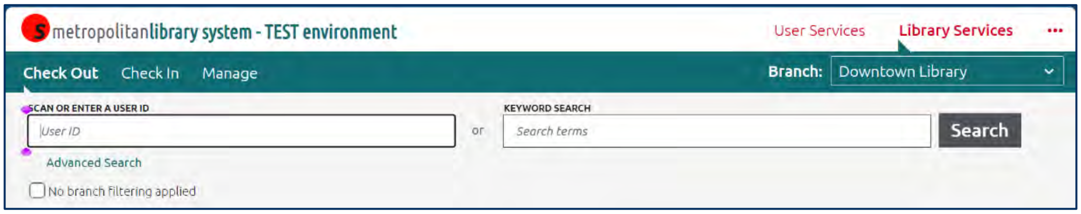
- Check out
- Check in
- Manage



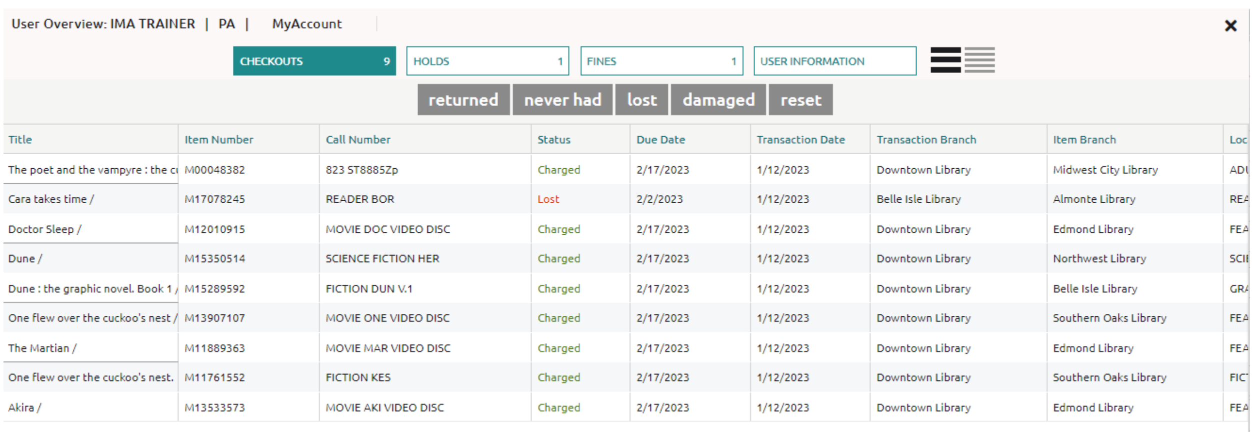
Let's take a look at each one.

CARL.CONNECT CHECK OUT

How to Charge an Item

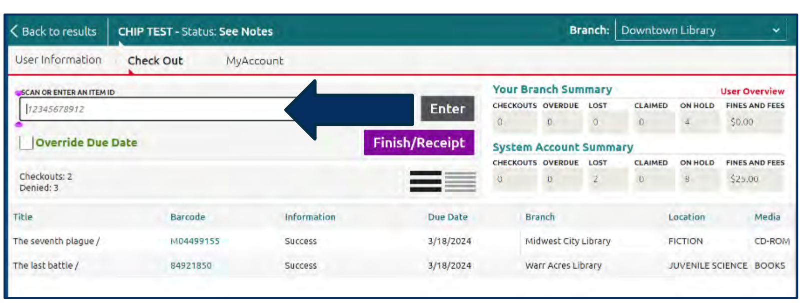


1. Under Library Services, select **Check Out**.
2. Enter the library card number in the **User Id** field or search for a guest in the **Keyword Search** field.
3. **Your Branch Summary** and **System Account Summary** displays next to the check out box.
4. **User Overview** provides an overview of checkouts (including overdue and lost), holds, and fines as well as user information.

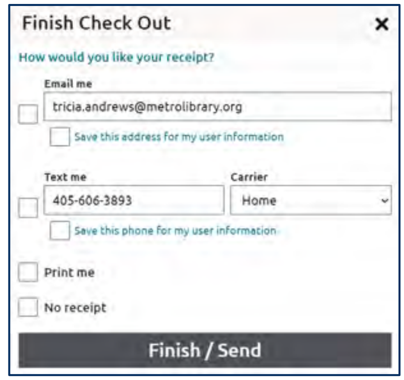


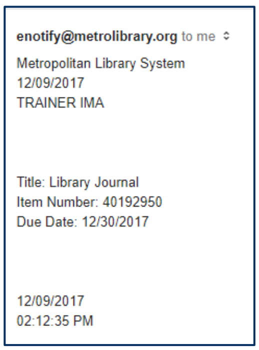
Title	Item Number	Call Number	Status	Due Date	Transaction Date	Transaction Branch	Item Branch	Loc
The poet and the vampyre : the c	M00048382	823 ST8885Zp	Charged	2/17/2023	1/12/2023	Downtown Library	Midwest City Library	ADU
Cara takes time /	M17078245	READER BOR	Lost	2/2/2023	1/12/2023	Belle Isle Library	Almonte Library	REA
Doctor Sleep /	M12010915	MOVIE DOC VIDEO DISC	Charged	2/17/2023	1/12/2023	Downtown Library	Edmond Library	FEA
Dune /	M15350514	SCIENCE FICTION HER	Charged	2/17/2023	1/12/2023	Downtown Library	Northwest Library	SCI
Dune : the graphic novel. Book 1 /	M15289592	FICTION DUN V.1	Charged	2/17/2023	1/12/2023	Downtown Library	Belle Isle Library	GRA
One flew over the cuckoo's nest /	M13907107	MOVIE ONE VIDEO DISC	Charged	2/17/2023	1/12/2023	Downtown Library	Southern Oaks Library	FEA
The Martian /	M11889363	MOVIE MAR VIDEO DISC	Charged	2/17/2023	1/12/2023	Downtown Library	Edmond Library	FEA
One flew over the cuckoo's nest.	M11761552	FICTION KES	Charged	2/17/2023	1/12/2023	Downtown Library	Southern Oaks Library	FIC
Akira /	M13533573	MOVIE AKI VIDEO DISC	Charged	2/17/2023	1/12/2023	Downtown Library	Edmond Library	FEA

5. More tools for and information about items checked out, Lost, and fines and fees are available through **MyAccount**.
6. To start checking out, scan or enter item numbers in the **Item ID** box. Item numbers that start with an "M" or "A" must be typed as a capital letter or it will not be found by the system.



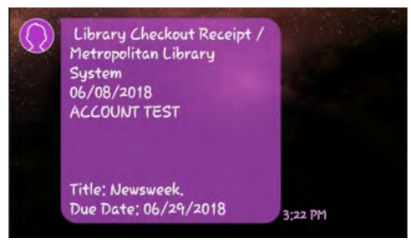
7. The checked-out items will show under the box to scan item IDs.
8. When the transaction is complete, click the green **Finish/Receipt** button. There are several options of how to send or print a receipt. Staff can select one or more options for delivering receipts. Each delivery method selected will generate a receipt. Choose **finish/send** to complete the receipt transaction. Staff have the option to select how the handle the receipt: Email, Text, Print, No Receipt

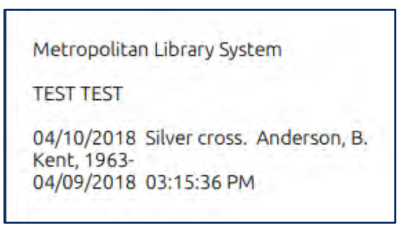




Email – if an email has not already been entered, enter it now and save it to the account. The email will look like the example on the left.

Text – if a cell number has not already been entered, you can enter it now and save it to the account. The text receipt will look like the example to the right.





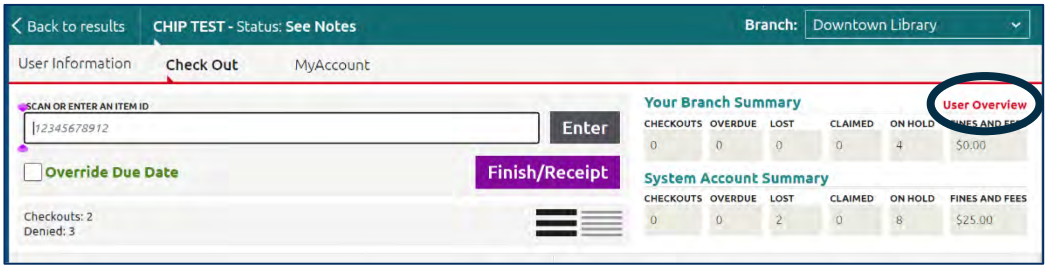
Print – print receipts will print to whichever printer is selected. Print receipts will look like the example on the left.

Override Due Date

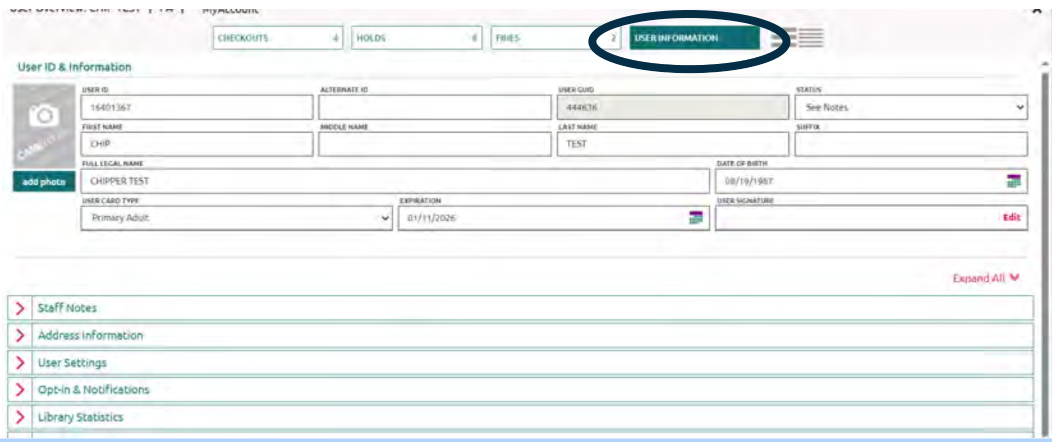
When checking out to an account, it is possible to override the due date by selecting the **Override Due Date** check box. This will bring up a calendar date picker to select the date to make the checkouts due.

User Information from the Check Out screen

To view user information from the checkout screen, select **User Overview** on the right.



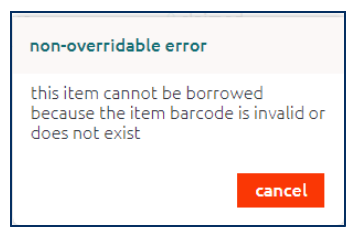
Then Select **User Information.** The window will scroll to show all the information. All information in User Information is editable.



ERROR & STATUS MESSAGES

Invalid Barcode

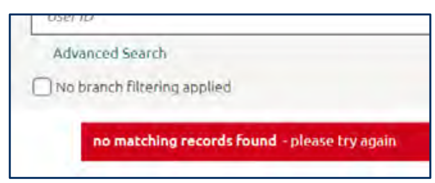
Typing a barcode into the checkout field that does not exist displays this window:



The only option is to **Cancel** and try again.

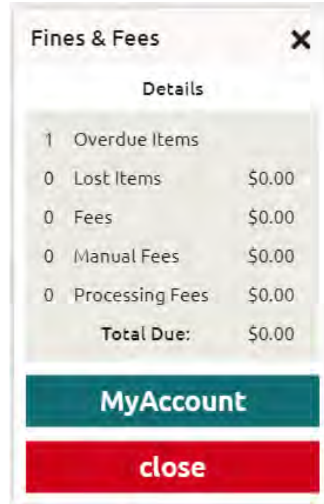
No Matching Records

If the search by name or library account number does not return any results, the following message displays:



If this message displays, make sure the branch filtering is turned off (no red check mark) and try again.

Fines and Fees

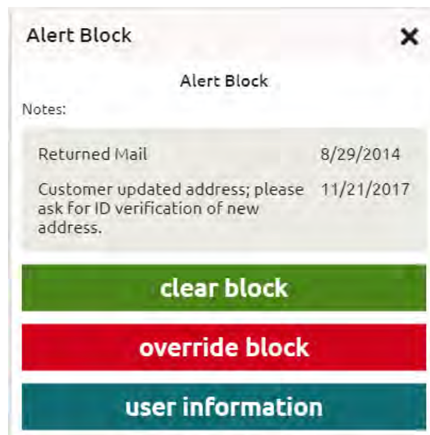


This is the equivalent of Delinquencies in CARL.X. It will display the count of overdue items as well as the count and number of Lost items, Fees, Manual Fines, and Processing Fees due. The total due is at the bottom.

Selecting **MyAccount** will open to the MyAccount page.

Close will close the box and navigate to the Check Out page.

Alert



This is the equivalent of Soft Block in CARL.X. It will display the count of overdue items as well as the count and number of Lost items, Fees, Manual Fines, and Processing Fees due. The total due is at the bottom.

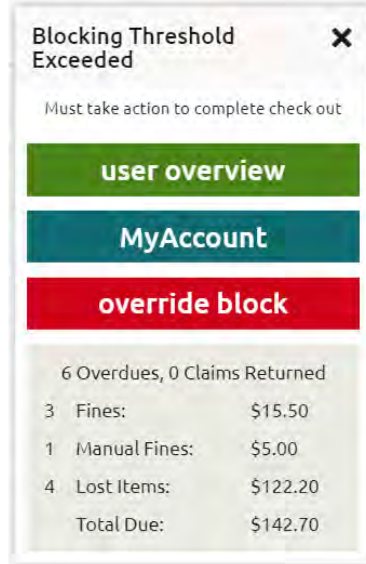
To add an alert for other staff regarding an account, change the status to 'See Notes' and add a note to the record. The Soft Block exception message and notes will display the next time the record is retrieved. Soft Blocks can be overridden multiple times without being satisfied but should be taken care of as soon as possible. *Reminder: 'See Notes' will block usage of the self-checkout machine.*

The **Clear Block** button will remove the Soft Block/See Notes status and return the account status to Good. The Check Out window will then display, and materials can be checked out. The note accompanying the status must also be deleted at this time. This does not happen automatically.

The **Override Block** button will leave the block in place and allow material to be checked out. The next time the account is pulled up, the Alert Block exception will display.

The **User Information** button will navigate to Patron Information. From here, view any areas of the record that are needed to resolve the alert.

Blocking Threshold Exceeded



A hard block on an account prevents an account from checking out additional items. A hard or system block is placed on the account when it exceeds one or more of the library's delinquency thresholds. In CARL.Connect, the Alert Block is the equivalent of the Hard Block in CARL.X. In Check Out, when a hard-blocked account is opened, the exception dialog box displays, requiring action before proceeding.

Thresholds Include:

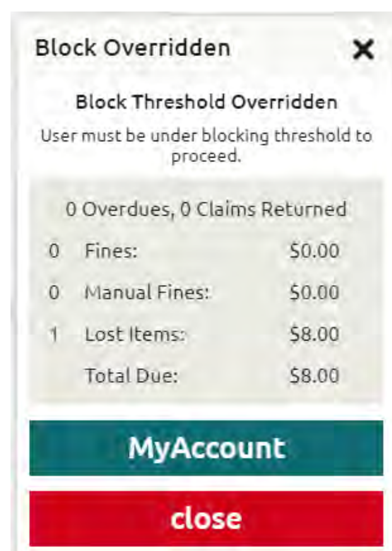
- Material overdue 29 or more days
- $50 or more in fines.
- Lost Item / Item more than 60 days overdue
- 18 Claims Never Had in 12 months

The **Override Block** button enables charging items to the account while retaining the block on the record. The exception window disappears, and the charge transaction can proceed. **Each account is allowed only one override of a Hard Block.**

The **Close** button will retain the hard block on the record and deny any charges.

The **User Information** button will navigate to the corresponding screen. Any delinquencies can be waived or cancelled from MyAccount then return to the Check Out session.

Block Overridden



Based on library parameter settings mentioned previously, once a hard block is overridden, it may not be overridden again until the account has no blocking thresholds.

SUPERVISORS do have permission to reset the number of overrides an account has in extenuating circumstances. In CARL.Connect, navigate to User Services > User Look Up. Search and open the guest record. Under "Status" change it from "Overridden" to "Over Threshold". Save the record. From here, select "Check Out" on the green bar to check material out to them.

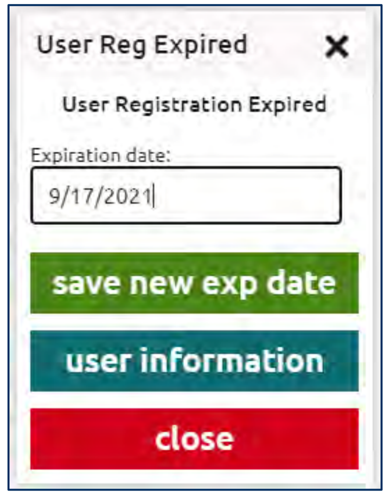
The **Close** button will retain the hard block on the record and deny any charges. They may not charge any materials until all delinquencies on their record are cleared.

The **MyAccount** button will navigate to the corresponding screen. Negotiate any delinquencies from the record then return to the Charge session.

User Registration Expired

This is the equivalent of the CARL.X message: ‘Patron Registration Expired’.

This message displays when an account has expired. Staff may update the expiration date from this screen or navigate to User Information to verify the user information.

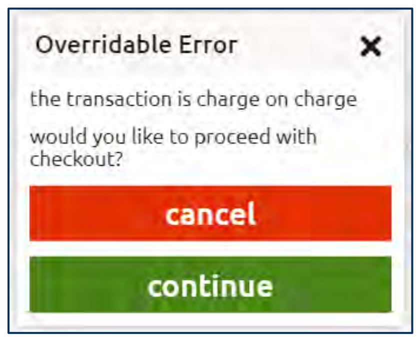


Charge on Charge

This is the equivalent of the CARL.X message: ‘Item is charged to another patron.’

The **Cancel** button returns to the checkout screen

The **Continue** button checks the material out to the new account and returns to the checkout screen



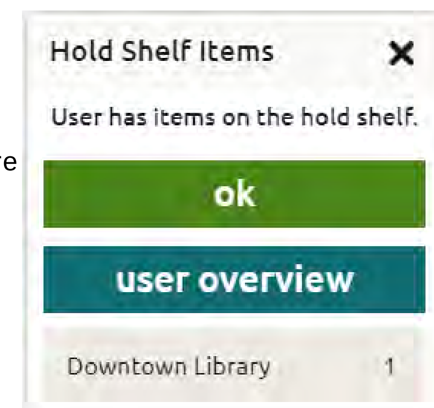
Hold Shelf Items

If an account has material waiting for them on the hold shelf, the Hold Shelf Items exceptions will display when the library card is scanned or entered.

It will state which location the holds are at and how many there are.

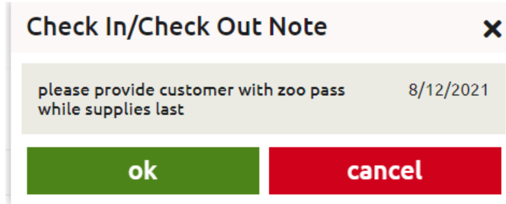
The **OK** button will acknowledge the exception box and allow materials to be charged.

The **User Overview** button will navigate to the corresponding screen to find out what titles are on the hold shelf.



Charge / Discharge Note

Charge/Discharge Notes may be placed on items to alert staff, at the point of Charge or Return, that there is something to be noted about this item. When a Charge/Discharge Note is on an item, the Charge Exception box will display each time the item is charged or returned.



The **OK** button will acknowledge the exception and allow you to continue in Charge or Return.

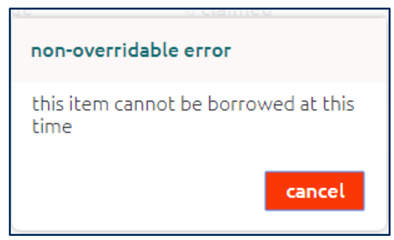
The **Cancel** button will not charge the item and allow you to continue in Charge. The item will remain with an 'On Shelf' status.

Charge/Discharge Notes are currently used on hotspots that are deactivated, items with zoo pass vouchers, and for Library of Things (LOT) media codes noting a waiver is required.

Item Cannot Be Borrowed

This is the equivalent of the CARL.X message: 'Non-circulating Item.'

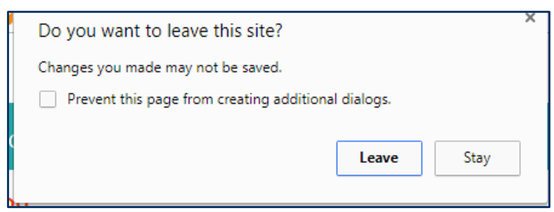
This message displays if the item is a Reference Only item, the location is a non-circulating location code (BKR), a Restricted account is checking out an R-Rated DVD, a ONECard account is checking out a non-allowed item, or if the account is Internet Access Only Account.



Leave this page?

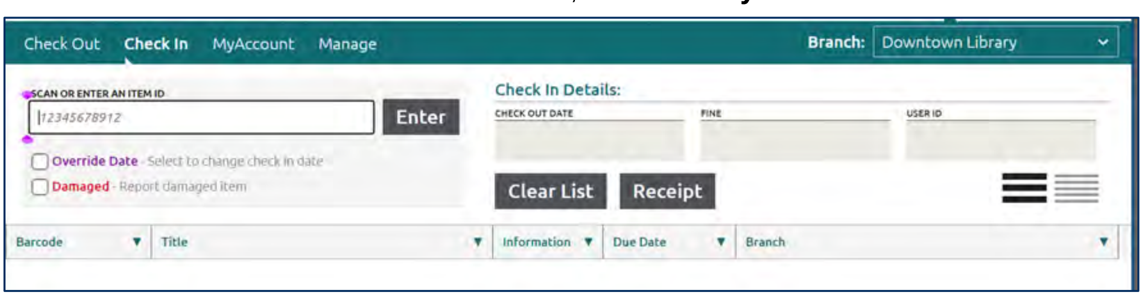
Clicking **Back To Results** before clicking **Finish/Receipt**, displays the message:

It does save the checkouts already processed even if **Leave** is selected.



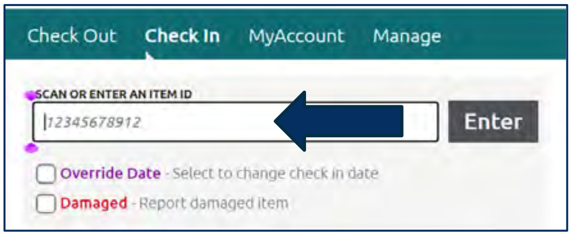
CARL.CONNECT CHECK IN

To access the Check In screen in CARL.Connect, select **Library Services** and then **Check In**.

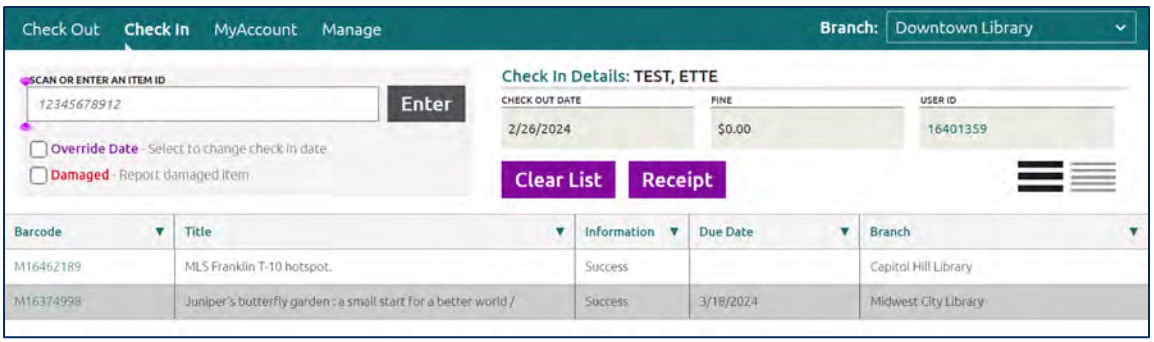


Returning an Item

While on the Check In screen, type or scan the barcode into the **Item ID** field.

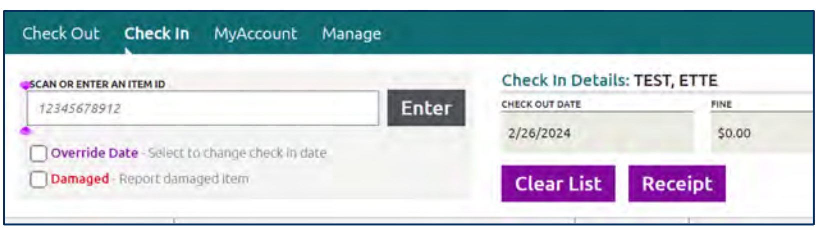


If the material belongs to your library and is not on hold, no exceptions boxes are generated. Information about the Item displays in the grid below and under check in details.

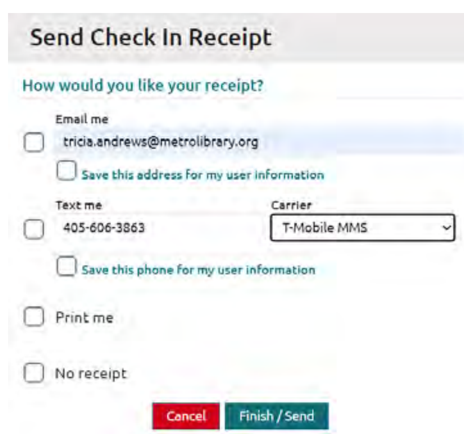


Print a Return Receipt

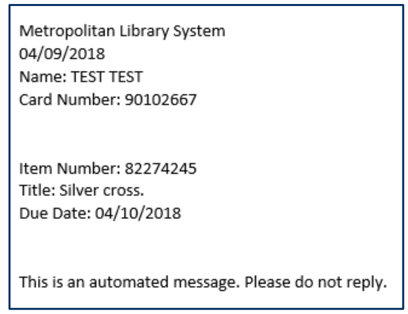
The **Receipt** button in the middle of the screen will provide a return receipt.



Clicking **Receipt** will bring up the Send Check In Receipt window which provides the same options as for Check Out receipts: Email, Text, Print, No Receipt

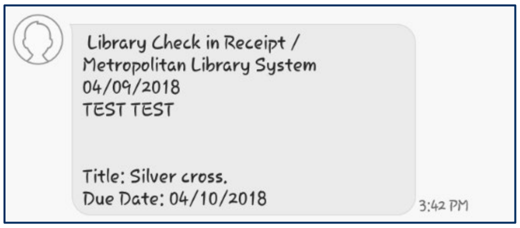


Email – if an email has not already been entered and an email receipt is desired, enter it now and save it to the account. The email will look like the example on the left.


Metropolitan Library System
04/09/2018
Name: TEST TEST
Card Number: 90102667

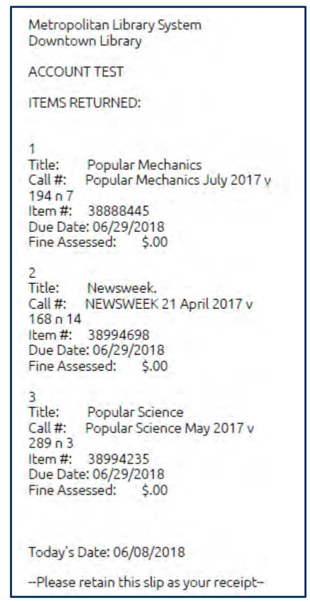
Item Number: 82274245
Title: Silver cross.
Due Date: 04/10/2018

This is an automated message. Please do not reply.


Library Check in Receipt / Metropolitan Library System
04/09/2018
TEST TEST

Title: Silver cross.
Due Date: 04/10/2018
3:42 PM

Text – if a cell number has not already been entered and a text receipt is desired, enter it now and save it to the account. The text receipt will look like the example to the right.


Metropolitan Library System
Downtown Library

ACCOUNT TEST

ITEMS RETURNED:

1
Title: Popular Mechanics
Call #: Popular Mechanics July 2017 v 194 n 7
Item #: 38888445
Due Date: 06/29/2018
Fine Assessed: $.00

2
Title: Newsweek.
Call #: NEWSWEEK 21 April 2017 v 168 n 14
Item #: 38994698
Due Date: 06/29/2018
Fine Assessed: $.00

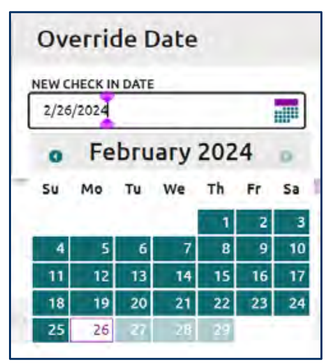
3
Title: Popular Science
Call #: Popular Science May 2017 v 289 n 3
Item #: 38994235
Due Date: 06/29/2018
Fine Assessed: $.00

Today's Date: 06/08/2018
--Please retain this slip as your receipt--

Print – print receipts will print to whichever printer is selected. Print receipts will look like the example to the left.

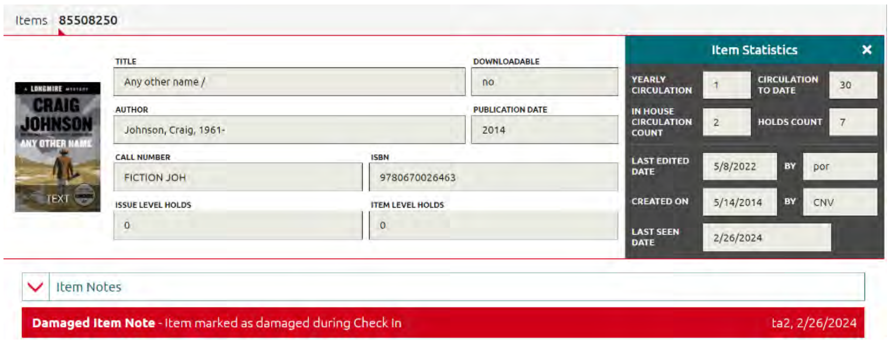
Override Date

- To override the check in date (backdate materials), click the checkbox next to **Override Date**.
- A date picker will come up.
- Select the date that the materials will be checked in as.
- When check in is complete, uncheck the box or navigate away from the check in screen.



Damaged Items

There is an option to check an item in as damaged from the Check In window. When the "damaged items" box is checked, items will be removed from the account and will receive a "damaged" status. An item note will be placed on the item that was checked in as damage status. Accounts are charged the appropriate overdue fine.



For hold in transit and hold shelf, appropriate steps will be taken to keep an item on hold as an ASAP hold. If the hold has already been triggered, a notification will automatically generate so staff will need to notify the account holder the item is not available, and a new copy is being requested. If the hold has not been triggered, no notification will be generated since it did not go to a "hold shelf" status.

Accounts are not manually charged the replacement cost if the item is checked in as "damaged".

Staff must unselect "Damaged Item" after the transaction is complete.

CHECKIN EXCEPTIONS

Each time items are checked in that are on hold, have fines, or do not belong to your library, there will be a confirmation message. All check in exceptions will have 3 options: Cancel, Continue, or Continue & Print.

- **Cancel** – Stops the check in. This option returns you to the Check In screen without checking in the item.
- **Continue** – Checks the item in and adds it to the Check In grid.
- **Continue & Print** – Checks the item in and opens the dialog to print a receipt.

Hold In Transit

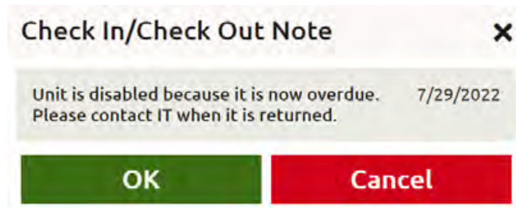
When an item has a hold on it for another branch, the following Exception displays:

Place on Hold Shelf

When an item has a hold on it for your branch, the following Exception displays:

Charge / discharge Note

Charge/Discharge Notes may be placed on items to alert staff, at the point of Charge or Return, that there is something to be noted about this item. When a Charge/Discharge Note is on an item, the Charge Exception box will display each time the item is charged or returned.



The **OK** button will acknowledge the exception and allow you to continue in Charge or Return.

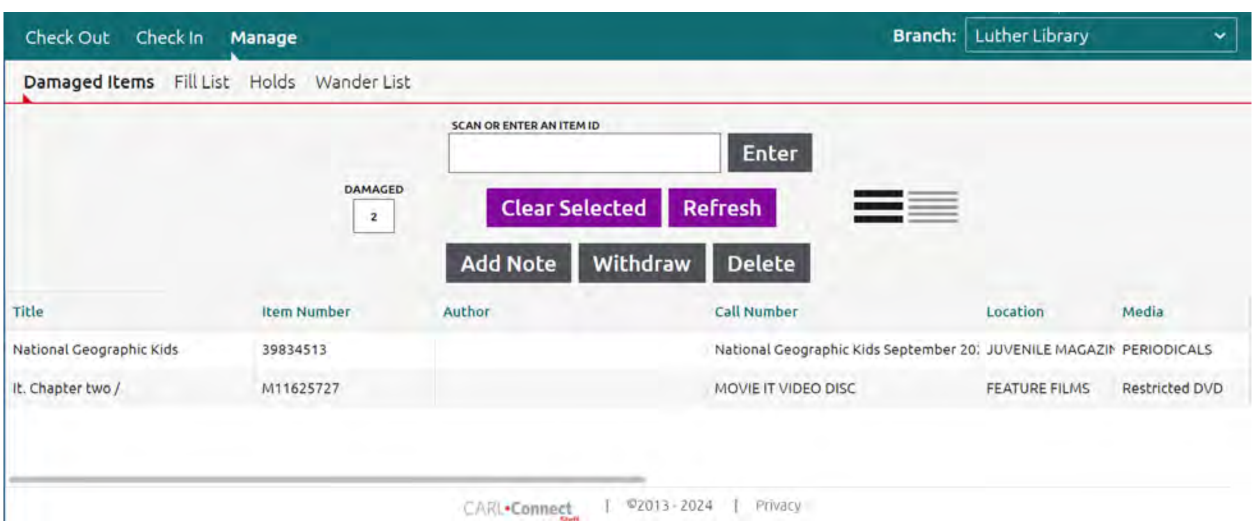
The **Cancel** button will not charge the item and allow you to continue in Charge. The item will remain with an 'On Shelf' status.

Charge/Discharge Notes are currently used on hotspots that are deactivated, items with zoo pass vouchers, and for Library of Things (LOT) media codes noting a waiver is required.

CARL.CONNECT MANAGE

DAMAGED ITEMS

CARL.Connect has an additional feature regarding "Damaged Items". You can navigate to it by going to Library Services > Manage > Damaged Items.



Staff can "Add Note" and a free text note will be placed on the item. This is not used at MLS.

Staff can “withdraw” items directly from this screen. Multiple items may be highlighted and changed to “withdraw”. All withdrawn items should be handled appropriately.

Staff can “delete” the item. By selecting “delete”, the item is deleted from the system. This is not used at MLS.

- Collections Services Department uses data from items that are withdrawn such as circulation usage, hold information, etc.

Al items with a “damage” status are automatically coded withdrawn after two weeks.

Staff can scroll to see the following information: title, item number author, call number, location code, media code, status date, BID, total number of copies on the BID, hold information (title, item, issue), and damage item notes.

Just Added

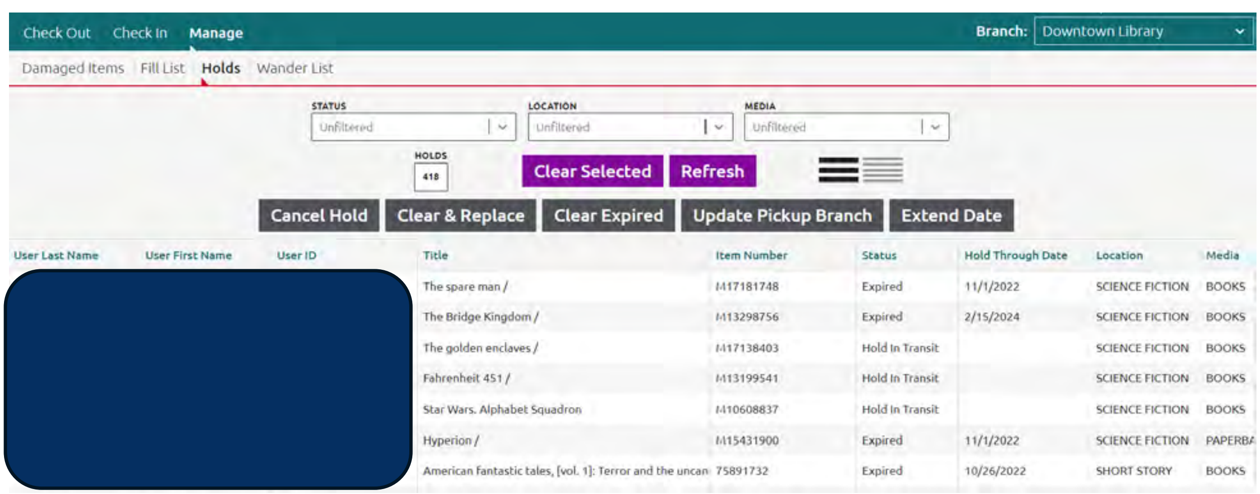
Staff can “Scan or Enter an Item ID” in the box in Manage > Damaged Items. It works the same as checking items in as “Damaged” in the Check In window. The only difference is an item note will not be placed on the item to alert staff it was checked in as damaged.

Damaged at this Branch

All items that are scanned as “Damaged” will show up in “damaged at this branch”. If you are at Southern Oaks and scan a Luther item in as damage, the item will show up in Luther “damaged at this branch” box.

HOLDS

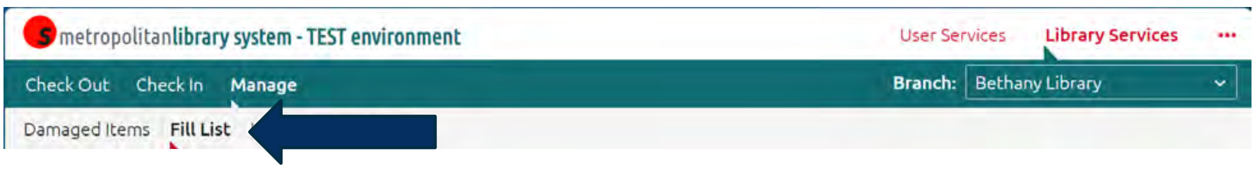
Staff can interact with holds at their branch in Library Services > Manage > Holds. Staff can cancel hold, clear & replace, clear expired holds, update pickup branch, or extend date. When your branch is selected, all holds will be displayed here.



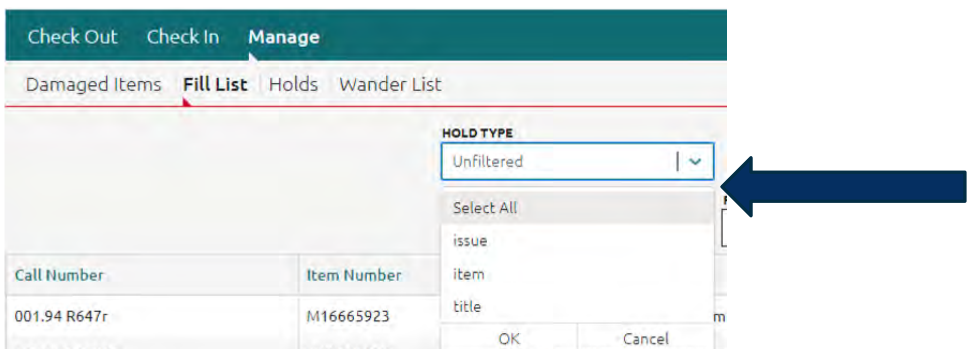
- Cancel Hold – cancel the hold.
- Clear & Replace – clear an expired hold from the hold shelf and put the guest back on hold for the item.
- Clear Expired – Process holds expired. All dates will have an expiration date of yesterday or earlier.
- Update Pickup Branch – Change the pick up branch where the hold needs to be picked up. A new hold slip will need to be generated before pulling and sending to the updated branch.
- Extend Date – Staff can updated when the hold should expire in this screen. It will update correctly on the holds expired list.

FILL LIST

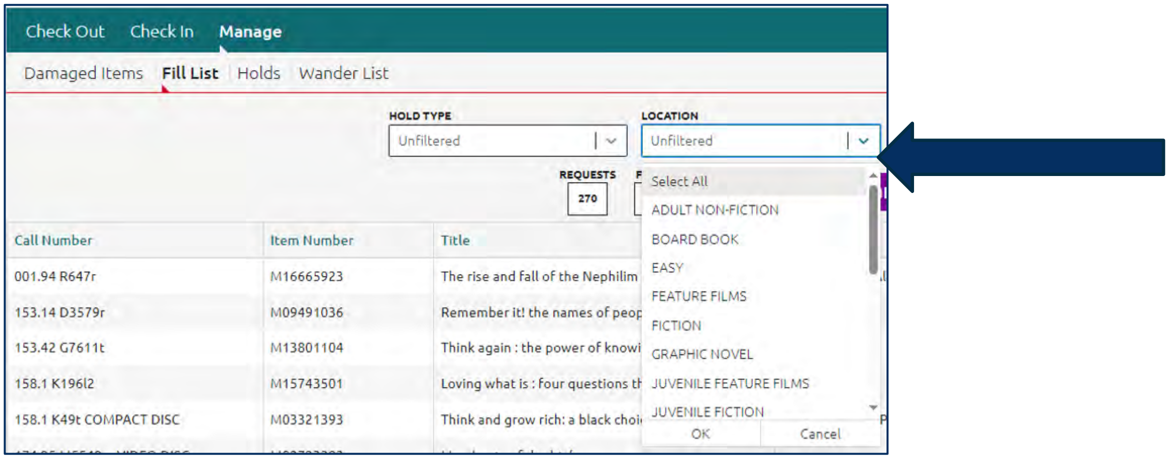
1. Log into CARL.Connect. Select **Library Services** then **Manage**.



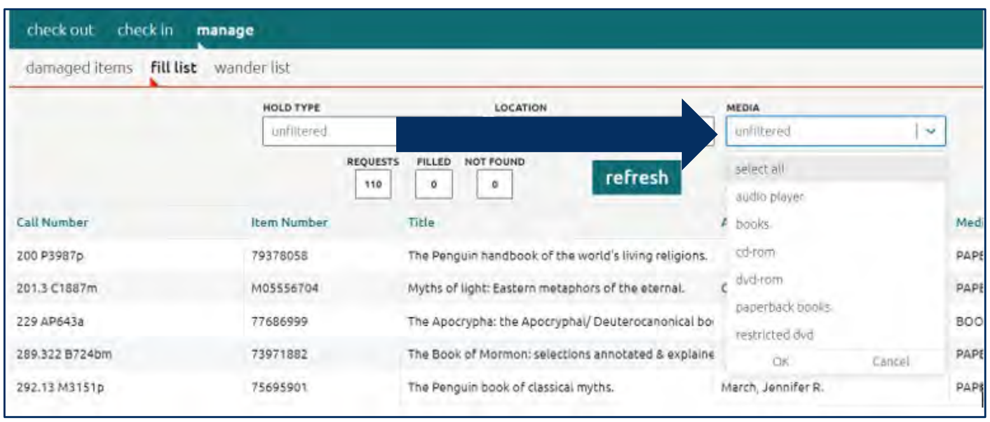
2. The "Hold Type" defaults to including title, issue, and item.



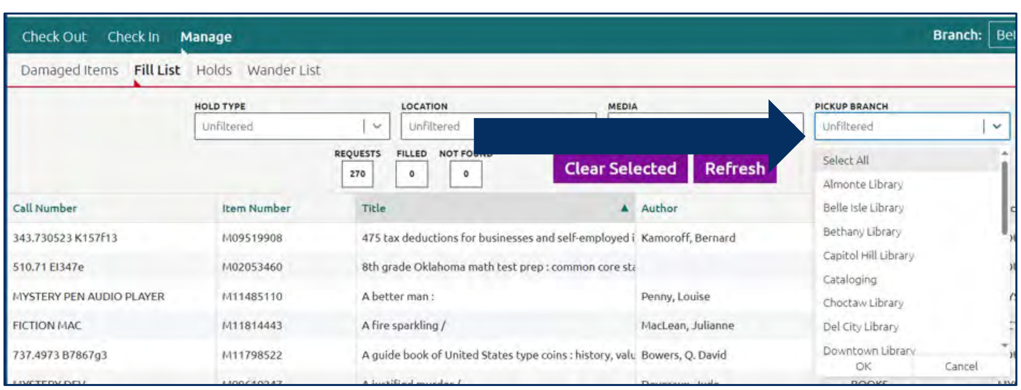
3. The location code list will populate based on the items on the fill list. Filter the location codes based on the sections currently being searched for, then select “ok”.



4. The media code list will populate based on the items on the fill list. Filter the media codes based on the sections currently being searched for.



5. The pickup branch list will populate based on the libraries on the fill list. Filter the pickup branch based on what branches you want to pull holds for or to exclude.

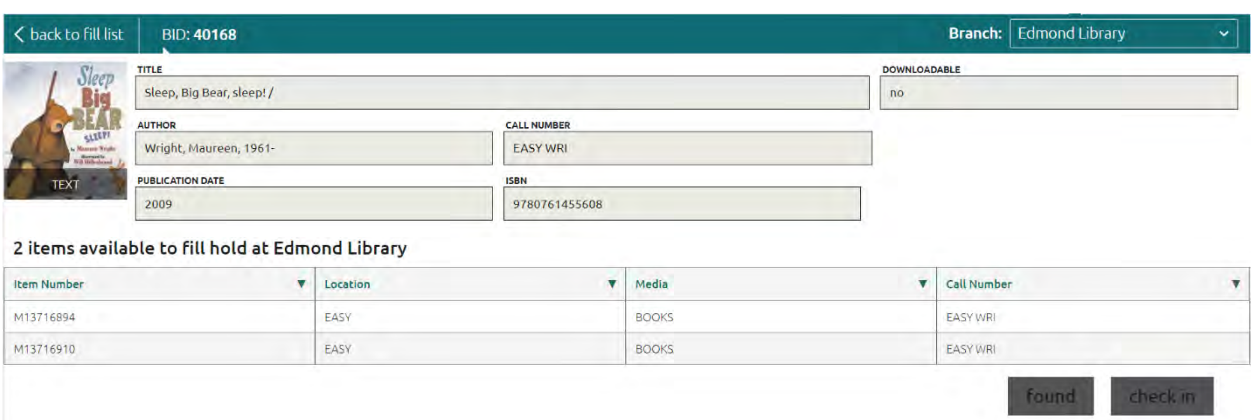


6. There are two options to view the **fill list**.
    a. When **Above the Grid** is selected, multiple items can be selected, and an action can be selected for all items in the list.
    b. When **Within the Grid** is selected, action must be taken against each item in the list.

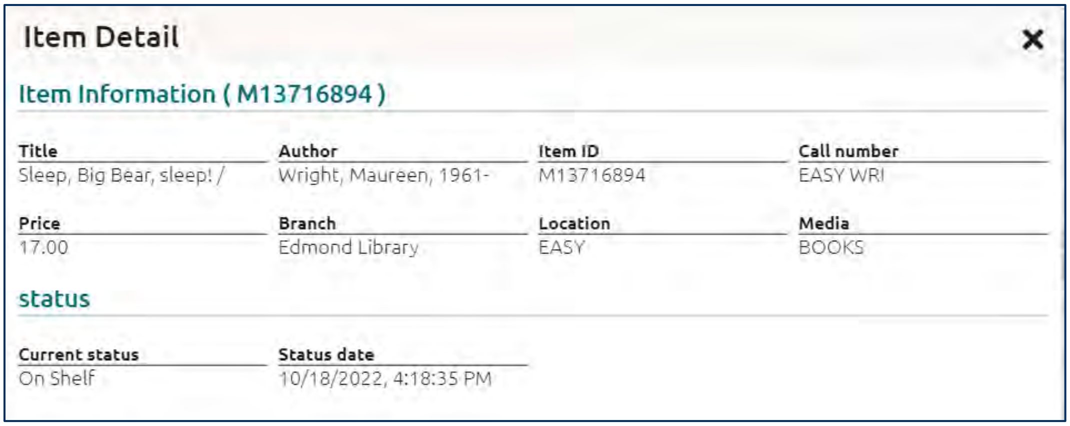
Note:** Select your preference in **Settings** under **Hold Action Menu Settings.

7. When a row is selected or multiple items are selected (depending on your settings preference), 4 buttons become available: **Not Found**, **Found**, **Fill With,** and **Item Detail**. Items on the Fill List relate to a specific item number. <u>*Even if it is not an item-level hold, this list acts like item-level holds.*</u>

    a. Select **Found** if the item is located. <u>Be sure the item number on the list matches the item number in hand.</u>
        i. The **Found** item will disappear from your list and the status for that item number will change to Hold Pending.
        ii. Once it has the Hold Pending status, it will prevent other items under that BID from filling that hold.
    b. Select **Not Found** ONLY after the back room and display areas have already been searched and did not find the item.
        i. Selecting this changes the item's status to **Not On Shelf**.
        ii. All items with the **Not On Shelf** status appear on the **Not Found** list.
    c. Select **Fill With** to fill the hold with a different item number under that BID number.
        i. After selecting **fill with,** this screen will come up.
        Note: If this screen does not come up, the item number you replaced is under a different BID number, therefore, you cannot fill the item with the updated item number you found.
        ii. Select the item number you found to replace the original hold number listed
        iii. Select **Found**



    d. **Item Detail** will provide a pop-up of information about that item. The status date is the same as the last action date. If an On Shelf return occurred in the meantime, that date will not be reflected.



8. Bring found materials to a machine that is connected to a receipt printer. Use the same process as usual to print the hold slip. Some locations check items in one by one, others use the hold printer macro.
9. Mark any items not found as **Not Found**.
10. Put the iPad away, plugging it in to charge if needed. When all the iPads have been returned, secure the iPads using your location's method.

Note: When items are off your fill list and move to another fill list: Items will stay on the fill list until the status of the item changes. Therefore, it is essential staff mark the item not found if it is no found instead of leaving it on the fill list. The guest will continuously wait for the item to be available at your branch since there is an available copy.

A note about charging iPads: mobile devices need their battery run down occasionally so that the battery stays healthy. If a mobile device is always plugged in and never runs down the battery, the battery will eventually not hold a charge for very long. If iPads are used every day, plug them in when they reach around 50% charge. Unplug them once they are fully charged.

Troubleshooting the Fill List

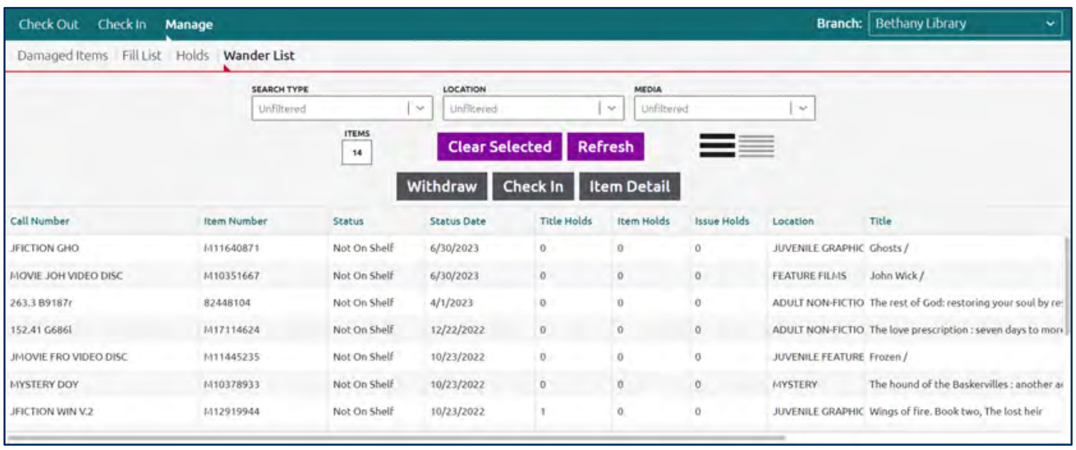
1. CARL.Connect works best when everyone logs out at the end of the session.
2. If **Found** was accidentally clicked for an item that is not in hand and the title is not available to search for it:
    a. In CARL.X, run an Items by Status report (#17) for the status "Hold Pending."
    b. Locate the item number on the Hold Pending status report
    c. Check the item in as "Damaged Item"
    d. Navigate to Item Maintenance and enter the item number
    e. Update the status to "shelf" or other appropriate status
3. If staff cannot get logged in or CARL.Connect is not responding, try closing out of Safari.
    a. To close out of Safari, touch the double window icon in the upper right corner of the browser. When the window shrinks, touch the 'x' on the window to close it. Safari will reopen to a blank page.

4. If an error occurs when trying to mark an item found, press the Refresh button at the top. The list does update live when the hold has been filled or marked ‘Found’ on another iPad so items will disappear off your list as other people fill holds. If the item isn’t there after refreshing, it means someone else filled the hold.
    a. If refreshing does not solve the problem, close out of Safari and reopen it.
5. If an Internal Server Error occurs, close out of Safari and reopen it.
6. If you cannot find a hold or the item needs to be withdrawn and it’s the last active copy in the system under that BID, notify collectiondevelopment@metrolibrary.org so they can evaluate whether it should be reordered.
7. After selecting “Found”, if an item shows in red text in the fill list, refresh your screen. Most likely, the hold was filled by a different copy and hasn’t refreshed off your fill list. If the pickup branch says “multiple”, you will want to go ahead and take it to the backroom to print and see if it fills a hold.

WANDER LIST

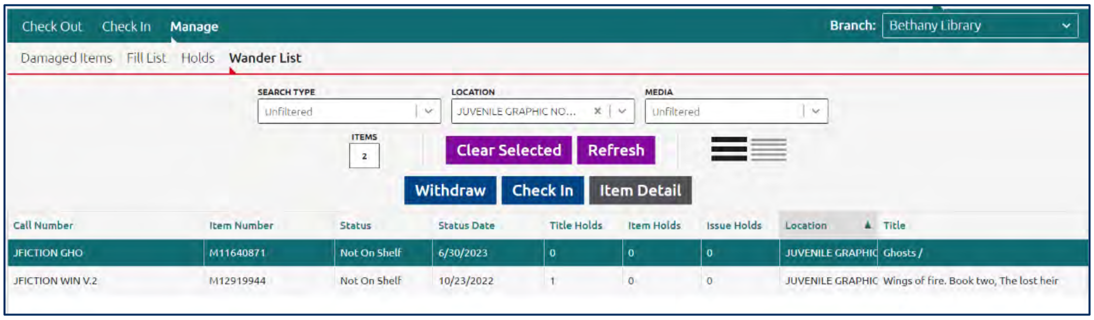
Not all holds are found when searching for them the first time. A second set of eyes looking for the materials can turn up materials that someone else has missed.

1. Log into CARL.Connect.
2. Select **Library Services** > **Manage** > **Wander List**.



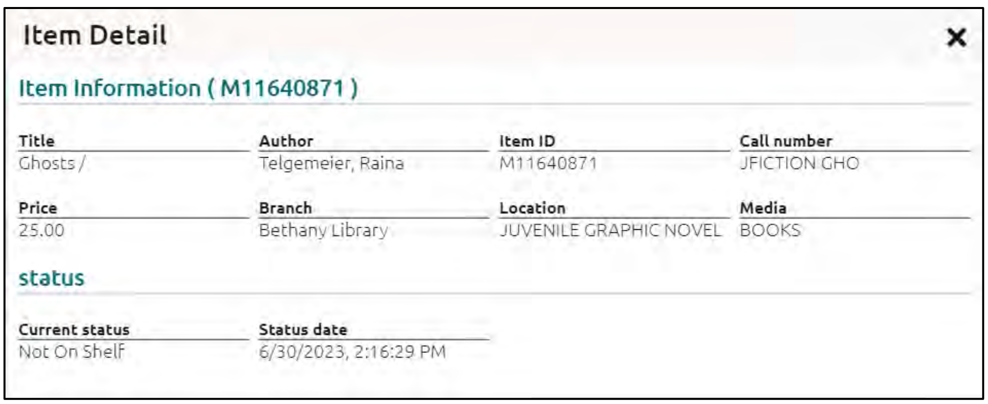
3. The Wander List is sorted by status date.
4. This list has interactivity available: withdraw, check in, and item detail. The buttons will show up at the top of the list and will display grayed out if no items are selected. It only displays the items that have been coded **Not Found**. If it takes very long to search for these items, refreshing the screen periodically will prevent being timed out of CARL.Connect.

5. We can see information on the title include if there are active hold on the BID (Holds on BID), last status date (when it was changed to Not Found), item number, etc.



   a. By selecting **withdraw**, we are coding the item *withdrawn***.**
   b. By selecting **check in**,
      i. If there are active holds on the BID, and this is selected, it will change the status to *holdshelf* if it is for pick up at your location or *hold in transit* if it is for pick up at another branch.
      ii. If there are no active holds on the item, by selecting this, the item will go back to *on shelf* status.

6. By selecting **item detail,** it will provide more information about the item.



7. During the second look,
   a. If the item is found, check it in through CARL.X and print the hold slip. It will come off the list.
   b. If the item is not found, after 7 days as “not on shelf”, it will automatically update to “Missing” status.

CARL.CONNECT ITEMS

To access Item Maintenance in CARL.Connect when already logged in, select **Items** from the 3-dot menu.

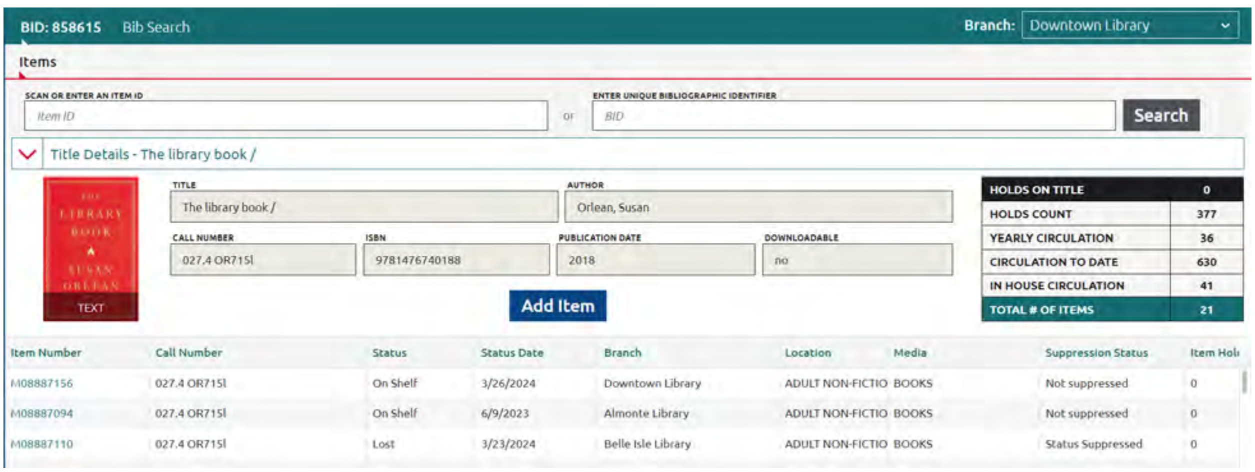
ITEM LOOKUP

From the Items screen, search by **Item ID** (left) or by **BID** (right) from this screen. When typing in Item IDs that start with "M," use a capital "M" or the search will fail.

At the top of the search results, there is information about the item as well as details on the total count of holds on title, holds count, yearly circulation, circulation to date, and in house circulation for all items on the BID.

Staff will need to minimize the Title Details to see the grid of all items on the BID.

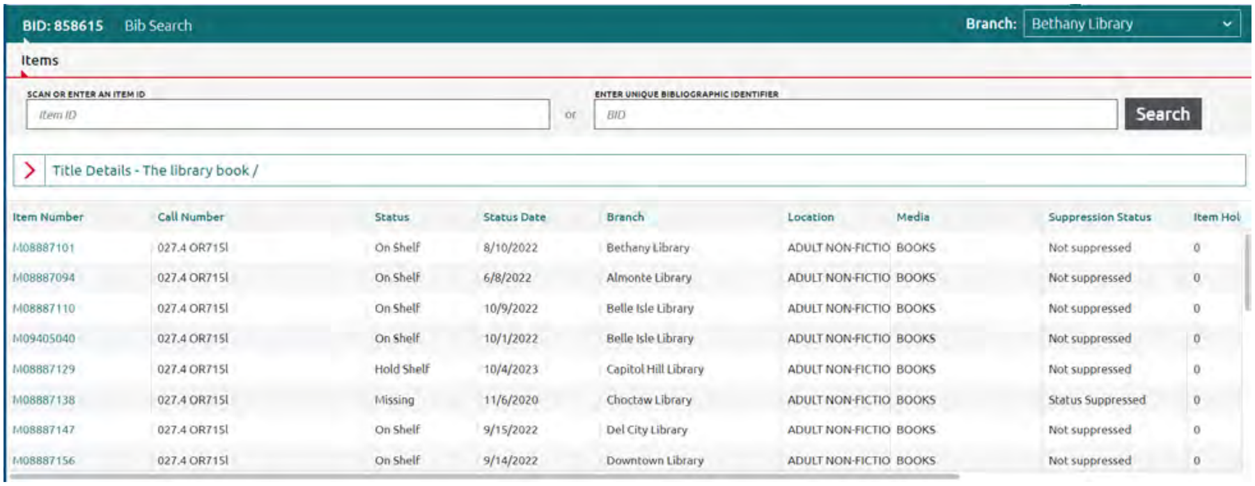
Whether searching by Item ID or BID, all search results come to the BID record. If there are multiple items under that BID and there is an item owned by the branch the user is logged in as, that item will populate at the top of the results.



Results Window

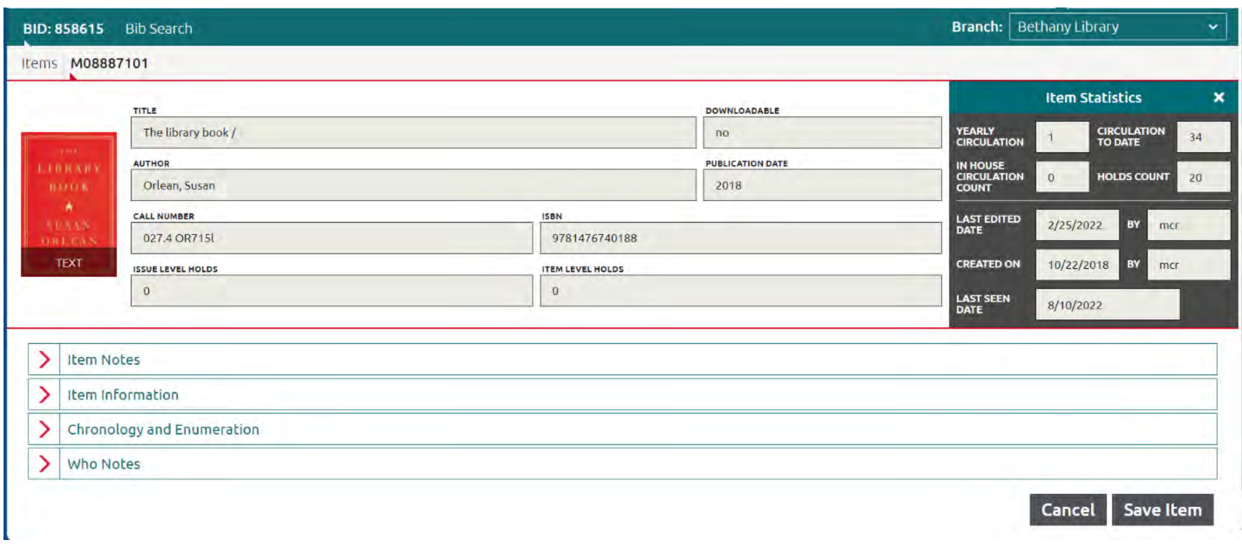
Once the Title Details in minimized, all items on the BID will display.

The grid of items will display the item number, call number, status, status date, branch, location, media, suppression status, item holds, issue holds, yearly circ, circ to date, and in house circ for the individual items on the BID.



To get specific information about an item, select the Item Number. It will open a new tab at the top. To go back to the main BID results, click on the "Items" tab.

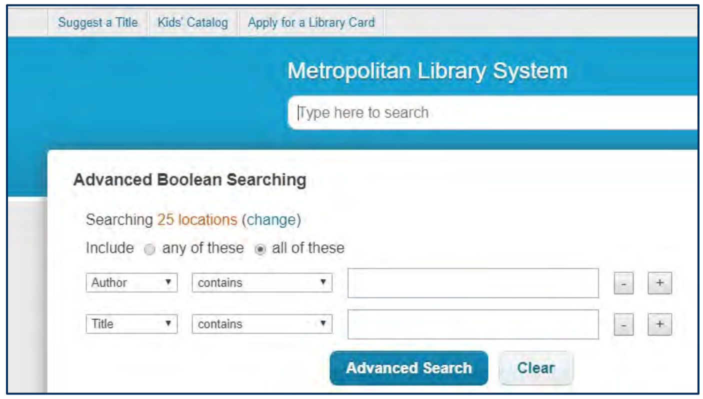
The top of the screen will give you item statistics on the BID including last edited, created on, and last seen date.



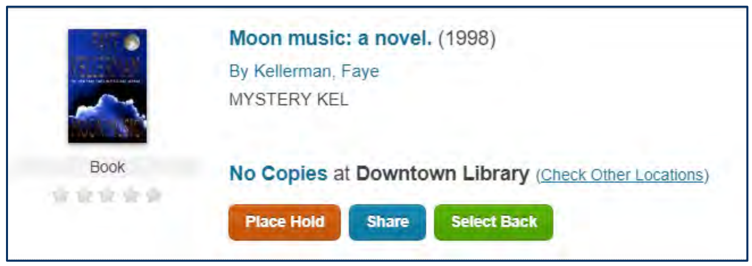
- **Item Notes** will display any notes on the item
- **Item Information** will display
  - o All editable information will be white with drop down options.
- **Chronology and Enumeration** will have Serials information
- **Who Notes** will give options for *Who has it? Who Had it? Who owes?* and *Who Wants it?*

BIB SEARCH

If the item number or BID number is unknown, the **BIB Search** option at the top offers searching within the CARL catalog by author, title, or other common search terms. While it does not currently provide the BIB/BID number or item number for the results, the user does have the option to select a title back to view in CARL.Connect.



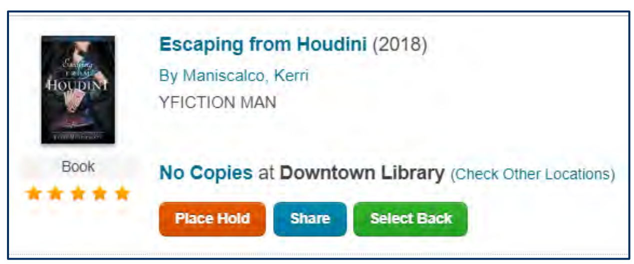
Enter information in the search boxes and click **Advanced Search**. Results will be shown in the catalog. Choosing **Select Back** will take the title back to the BID view.



CARL.CONNECT HOLDS

Holds are placed in CARL.Connect through loading the account into User Information and then utilizing **MyAccount**. This takes the user to the account in CARL Discovery.

Search for the title. Options available are **Place Hold, Share,** and **Select Back**.



When selecting **Place Hold**, the Place Hold dialog appears. Complete the hold process as usual.