

# SHARE Circulation and Resource Sharing Policy

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NOTE: Text in Black is policy that has been approved by SHARE membership vote. Texts in color are Best Practices that have been approved by the SHARE Circulation and Resource Sharing Committee and are waiting for SHARE membership vote.

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## GENERAL

- a) Definitions
  - i) Home Library
    - (a) Public: The library jurisdiction in which a patron lives is the patron's Home Library. If the patron lives in an un-served area, then the library where they pay their non-resident fee is the Home Library. (This may or may not be a SHARE library).
    - (b) School, Academic, and Special libraries: the home library is the library that registers the patron.
  - ii) Lending Library: The library that owns an item that is being lent.
  - iii) Borrowing Library: The library or their patron that is borrowing an item from another library.
  - iv) Transacting Library: The library where a circulation transaction takes place.
  - v) Local holds: A circulation condition set by the library that limits holds to only that library's patrons.
  - vi) Reciprocal Borrowing — A form of cooperative agreement between two or more libraries allowing their users on-site circulation privileges at another library. For purposes of this policy, reciprocal borrowing does not cover remote circulation (a means of allowing eligible library users to check out materials off site) or interlibrary loan. Definition of Reciprocal Borrowing from the ILLINET Interlibrary Loan Code (p. 8).
  - vii) Non-SHARE patron: A patron with a valid Illinois public library card from a Non-SHARE public library.
- b) Patron Confidentiality
  - i) The use of reading lists will be determined by each individual library.
- c) Sanctity of patron records
  - i) Regarding sanctity of patron records, the library that registers the patron will own that record, and will accept full responsibility for maintaining correct information, with the exception of blocking and non-blocking notes, which can be added to a

patron account by other libraries, taking into consideration patron confidentiality. Only that library can change information in the actual patron record.

- ii) Patron information in the SHARE database remains the property of the patron's home library. Use of such information shall be restricted to official use by SHARE member libraries and by IHLS/SHARE staff and in conformity with all applicable federal and state laws.
- d) Transitional and Affiliate member registration: Transitional and Affiliate members will be registered as a patron of their closest IHLS hub, with one barcode per library. Materials requested by these libraries will be processed by SHARE staff (check-in and check-out) at each of the IHLS hubs.
- e) ILL in-state and ILL out-of-state registration: there will be one record for each library in the ILS, owned by IHLS. Libraries should not register ILL libraries themselves, but should contact IHLS designated staff to create a patron record. Notifications will be set to the lending library policy.

## 2) CIRCULATION POLICIES

- a) Circulating Serials: If libraries are going to barcode and circulate serials, they will be required to use the Serials module in Polaris.
- b) Local Holds: Use of local holds is up to individual library discretion. All libraries are encouraged to be generous in sharing their collections.
- c) Loan Periods
  - i) Libraries may choose from the following loan periods:

0 days	7 days	60 days	2 hours
1 day	14 days	180 days	3 hours
2 days	21 days	365 days *	4 hours
3 days	28 days	999 days *	8 hours
4 days	42 days	1 hour	14 hours
- d) Overriding Loan Period/Renewal Blocks
  - i) Due dates cannot be changed and/or blocks on renewals be cannot be overridden.
  - ii) According the ILLNET Interlibrary Loan Code, section IV, no. 6: *The requesting library must honor the supplying library's conditions of loan, including observation of dates and duration of loans, recall notices, fees (if applicable), and in-library use only and*

*other special handling provisions. The requesting library will convey these conditions to library users.*

- iii) Failure to follow these policies may result in loss of interlibrary loan privileges, as well as financial responsibility for unreturned materials.

e) Overriding Patron Blocks:

- i) Any block established via the patron record will not be overridden by a Transacting Library.
- ii) The Transacting Library will deny the patron the privilege of borrowing items until blocks are cleared with the home library.
- iii) Patrons will be allowed to clear their record by paying amounts owed at the Transacting Library.
  - (a) Any fines collection by reciprocal lending libraries should be kept by the Transacting Library.
  - (b) Any amount collected for lost items, including fines (directly related to lost item being paid for) and processing fees should be collected and sent to the lending library.
- iv) Address check must be done at home SHARE library.
- v) Failure to follow these policies may result in loss of interlibrary loan privileges, as well as financial responsibility for unreturned materials.

f) Renewing Items:

- i) Library staff may try to renew items, as requested by the patron, but may not override a block to renewal if the item belongs to another library.
- ii) They may override blocks if the item is owned by their library.

g) **Circulating Damaged Material for Inter-Library Loan (DRAFT):**

- i) If an item has minor damage that does not impinge that item circulating, then owning library should do one of the following.
  - (a) Mark the item with date and nature of damage
  - (b) Make a note in the item record with date and nature of damage

- (c) Use Check In note to document date and nature of damage
- ii) If an item that has been requested from another library for a patron, but arrives damaged, then libraries shall do the following:
  - (a) Get complete information (in writing) on last patron, and return this information and the item to owning library.
  - (b) Make a written note of the nature of the damage (i.e. pages torn, cover damaged, Disc or case broken) on the written documentation of last patron.
  - (c) Owning library should then contact last patron's library, so that the library can contact their own patron.
- h) Circulating Incomplete Material (DRAFT):
  - i) Libraries should not send out items, for Inter-Library Loan, that have missing discs (or other pieces), loose pages/covers or torn pages/cover.
  - ii) If an item that has been requested from another library for a patron, but arrives missing parts, then libraries shall do the following:
    - (a) Get complete information (in writing) on last patron, and return this information and the item to owning library.
    - (b) Make a written note of what is missing from the item (i.e. Disc 5, case, booklet) on the written documentation of last patron.
    - (c) Owning library should then contact last patron's library, so that the library can contact their own patron.

### 3) PATRON REGISTRATION PROCEDURES AND PATRON RECORD MANTAINENCE

- a) Required Fields
  - i) Publics--After January 1, 2014, the following fields will be required in patron records on Polaris: birthdate; address; driver's license/id (including indication of state other than Illinois, or type of id used at the end of the number)
  - ii) Schools-- After January 1, 2014, the following fields will be required in patron records on Polaris: None at this time

- iii) Academics-- After January 1, 2014, the following fields will be required in patron records on Polaris: birthdate; driver's license/id (including indication of state other than Illinois, or type of id used at the end of the number); address
  - iv) Specials-- After January 1, 2014, the following fields will be required in patron records on Polaris: None
- b) Acceptable Forms of ID
  - i) Acceptable forms of proof of residency are considered a local library decision.
  - ii) Acceptable forms of ID include a valid photo ID from a government agency that contains the potential patron's legal name, and must be presented by all adults at the time they request a library card.
  - c) Patron moving from one jurisdiction to another: When a patron moves from one public library to another, the patron's new library will modify the previous library's patron record, instead of creating a new record.
  - d) Library card Expiration/Renewal and Patron Purge
    - i) Expired library cards must be renewed at home library.
    - ii) The registering library will accept full responsibility for maintaining correct information (i.e. contact information) in the patron record.
    - iii) Purge of expired patron records, or patrons who have left the District or Agency, will be determined by local library for their own patron records.

#### 4) RECIPROCAL PATRONS

- a) Services available to Non-SHARE patrons
  - i) Sharing Policy: 75 ILCS 16/1-5: Reciprocal borrowing means the privilege of person holding a valid library registration card from a local library to borrow library materials from other libraries.
  - ii) The patron's home library is responsible for reimbursing the lending library for reciprocally borrowed items not returned by patrons. The reimbursement will be made within eight weeks of receipt of the bill from the lending library.
- b) Registration of Reciprocal Patrons

- i) Non-SHARE patrons must present a photo ID and a valid library card for their home library, which is a non-SHARE library.
    - ii) The individual library will determine how to verify this information presented.
    - iii) The individual library will choose the manner to barcode cards for reciprocal patrons, such as using the barcode from the patron's home library, or a separate barcode.
  - c) Patron Record Settings
    - i) Reciprocal Borrower's patron type must be set to Reciprocal Patron Type in the database, for patrons of non-SHARE libraries.
    - ii) Expiration date must be set to the expiration date of home library. It will default to 1 year until date verified.
    - iii) No PIN shall be issued to Reciprocal Patrons
    - iv) Non-SHARE patrons from non-SHARE libraries will have only one account in the SHARE database.
- 5) ILL (out of system/OCLC) This functionality will not be enabled in Polaris for a few months due to testing of functionality in Polaris and OCLC's Worldshare is being implemented over the next several months. So this policy will be addressed at a later time.
- 6) LOST/DAMAGED MATERIAL
- a) Damaged materials: If a library's material is returned to a different location with damage, it will be sent back to the home library with a note explaining the situation and information about the patron who returned it. The lending library will then decide whether or not to charge the patron for damages. The patron should not contact the lending library directly.
  - b) Lost items: Payment for lost or billed material is forwarded to the appropriate library in the form of a check or money order payable to the lending library, including a description of what the payment is for. The patron's library is responsible for paying for the lost or billed material if the patron does not do so.
  - c) Items lost in Transit: It is important to remember that according the ILLNET Interlibrary Loan Code, section IV, no. 11: *Libraries that initiate interlibrary transactions for Non-SHARE patrons assume responsibility for that transaction. See Billing (7:c)*

- d) Material replacement costs:
  - i) With regard to material replacement costs, libraries are encouraged to use the list price of the item when possible, and to avoid excessively high default prices.
  - ii) The patron will be charged the amount identified in the patron's record for lost items.
  - iii) The decision to charge or waive a processing fee belongs to the lending library.

## 7) PAYMENTS AND BILLING

- a) Any fines collection by reciprocal lending libraries may be kept by the Transacting Library. Libraries may choose to set a specific threshold and return fines above that limit to the loaning library. They may deduct postage and handling fees.
- b) Any amount collected for lost items, including fines (directly related to lost item being paid for) and processing fees should be collected and sent to the lending library.
- c) Billing:
  - i) The lending library may bill the patron's home library for lost materials.
  - ii) Bills may be sent for items lost in transit.
  - iii) The time frame for billing the patron's home library is no later than 12 months from the item's due date or last in-transit date.
  - iv) Reimbursement will be made within eight weeks of receipt of the bill.

## 8) FORMS

- a) SHARE damaged/missing parts on requested item form



## Report of Damage or Missing Parts of Items Received in Delivery (DRAFT)

Name of Owning Library:

Delivery code (include hub code):

Damaged Item

Item Barcode:

Last Patron (Name & Barcode):

Nature of Damage:

Incomplete Item (parts missing or falling out)

Item Barcode:

Last Patron (Name & Barcode):

Describe missing pieces:

Name of Reporting library:

Reporting Library's delivery code (include hub code):