



SWAN Circulation Advisory
Wednesday, January 22nd, 2020
9:30 am – 12:00 pm
RAILS Main Meeting Room
125 Tower Drive, Burr Ridge, IL 60527

1. Introductions
2. Circulation Policy {Exhibit A}
3. Charge {Exhibit B}
4. Notices
 - a. SVA
5. Patron Purge
6. System Updates
 - a. 3.6.2
 - b. Rebuild (Offline)
7. Card Renewal through Enterprise
8. Patron site demo
9. Trainings
 - a. Outline activity



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Circulation Policy

Reviewed and approved by the SWAN Board on 2/15/2019.

If you are looking for policy configuration in Symphony WorkFlows, see [ILS Configuration](#).

1. General circulation rules

- A. Service should not be refused to any patron unless that user record is barred or blocked.
- B. User blocks, holds, and borrowing limits of zero are established in the user profile by the user's home library and follow the user from library to library. It is the sole responsibility of the user's home library to correctly, appropriately, and legally establish, modify, and remove user blocks, holds, and borrowing limits in accordance with the home library's policies. SWAN and its member libraries, other than the user's home library, are not responsible for reviewing, correcting, imposing, or otherwise changing user blocks, holds, or borrowing limits. Do not override user blocks or borrowing limits when checking out to a reciprocal borrower unless permission is granted by the user's home library.
- C. Circulation rules (loan period, fine rate, grace periods, number of renewals, and maximum charges by Itype) are established by the charging library.
 - i. Book discussion due dates may be extended.
 - ii. DVD Boxed sets added to the catalog after 1/1/2015 (TV Series, movies series, etc.) circulate for at least 2 weeks.
 - iii. The number of renewals are limited to either 0, 2, 5, or 10.
 - iv. The optional grace period is 3 days.
- D. Library staff should attempt to renew items for users regardless of due date or where items were checked out. Exception: Interlibrary Loan ("ILL") materials from outside of SWAN must only be renewed at the library where the item was checked out.
- E. The circulation map and the hold map must reflect the actual ILL policy of the owning library.
- F. Suspension of a user's library privileges must be set only by the user's home library. It is the sole responsibility of the user's home library to correctly, appropriately, and legally establish, modify, and remove user suspensions in accordance with the home library's policies. SWAN and its member libraries, other than the user's home library, are not responsible for reviewing, correcting, imposing, or otherwise changing user suspensions.

- G. It is individual library policy to set the expiration date of their users' library privileges. "NEVER" is an acceptable option.
- H. While the vast majority of library policy is established by the individual library, some policy can only be set by the consortia due to the limitations of the ILS software, such as but not limited to, run dates for overdue notices and bill notices, limits on the number of renewals.
- I. All items that can be checked out and/or returned at another SWAN library must have a codabar barcode on the item.

2. Holds

- A. Hold queues should be honored.
 - i. Per patron request, any unavailable hold can be cancelled at any SWAN library.
 - ii. When placing a hold, the pickup point can be any library that participates in "pickup anywhere".
 - iii. Hold queue reordering follows best practice.
- B. Each SWAN library is required to completely process the On Shelf Item with Holds Report at least Monday through Friday. Items not in circulation or on shelf need to be checked out to a generic user.
- C. Each SWAN library is required to physically process the "Clean Holds Shelf" report at least Monday through Friday. Items on the hold shelf must reflect the item's status.
- D. Pick-up dates are not to be modified for items on the hold shelf.

3. Handling of materials

- A. SWAN library materials are to be checked in and routed to appropriate destination, regardless of where they are returned.
- B. Materials from Non-SWAN libraries that cannot be checked in, should be forwarded to the owning library.
- C. According to local practice, the user may be held responsible for Non-SWAN materials until the items reach their final destination.
- D. Always use a new routing label when sending items in delivery. Staff should transfer any notes to the new routing label.
- E. Routing labels must include the library codes for both the TO: and FROM: libraries.
- F. Due to patron confidentiality, the user's name or barcode should not appear on routing labels.

4. Financial concerns

- A. All charges can be paid via eCommerce.
- B. Billing is generated at 42 days overdue.
- C. All charges must be accepted at any SWAN library. On a quarterly basis, SWAN debits and credits SWAN libraries for material replacement costs, including manual charges.

- D. Library staff can no longer pursue reimbursement for materials with a current location of INTRANSIT or those items “Damaged in Delivery” from SWAN or other SWAN libraries.
- E. Packing materials for ILL are not billable.
- F. Replacement materials are not accepted for ILL and Reciprocal Borrowing losses.
- G. Reimbursement for non-returned SWAN materials will be 365 days after due date. In order to abide by ILLINET ILL code, Non-SWAN libraries will be reimbursed 240 days after due date. All reimbursements will be processed on a quarterly basis.
- H. Once the item has been reimbursed through quarterly billing for all lost ILL/RB, monies will not be refunded.

5. Lost and claims returned items

- A. The Mark Item as Lost wizard should be used only when payment is made.
- B. The user Claims Return wizard is used only by SWAN staff for ILL/Reciprocal Borrowing transactions. This is done in consultation with the user’s home library.

6. Patron accounts/records

- A. Birthdate is a required field in patron user records.
- B. All user records must conform to current standards (see appended USPS guidelines).
- C. SWAN libraries must verify a user is in good standing before circulating to a new or renewing reciprocal borrower.
- D. Creating multiple records is prohibited. There are only a few instances when a user may have more than one valid record in SWAN. Acceptable examples include: children in joint custody situations, staff, non-resident property owners, and records created for SWAN academic or special library members.
- E. Academic and special library cards are not valid for use at a public library.
- F. A user record from another SWAN library can only be modified when the user has moved into your service area. However, library staff can assist any user in editing the following fields: PIN, email address, any phone field, SMS Texting, language or notice preference.
- G. All Non-SWAN user records should include the expiration date provided by the user’s home library or be assigned an expiration date one year from the date of issue.

7. Responsibility for lost interlibrary loan and reciprocal borrowing materials

- A. When all libraries involved in an ILL or RB transaction are SWAN libraries, the user’s home library is responsible for all costs.
- B. When a Non-SWAN library is involved in the transaction, the ILLINET ILL Code requires that the borrowing library must reimburse the owning library for any losses.

United States Postal Service standards (USPS)

1. Use a return address.
2. User all caps, spaces between words, no punctuation and left justify the margin.
3. [Use 2 letter state abbreviations.](#)
4. Use Zip Code or Zip 4 (if known) on the last line following city and state.

5. Use applicable directional.
 1. N-North, S-South, E-East, W-West
 6. [Include applicable designations.](#)
 1. RM-room, APT- apartment
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SWAN Circulation Advisory Group

CHARGE

The Circulation Advisory Group is charged with revising the SWAN Circulation Policy as needed, developing Circulation “Best Practices,” trainings, and evaluating the SWAN software and any circulation enhancements. This 11-member committee may also make recommendations regarding Circulation topics to the SWAN Board upon request. Meetings are held six times a year on the third Wednesday of the month. Committee members are elected to two-year terms on a rotating basis. Meetings are open to the full membership with opportunity for all to contribute during Open Forum.

Circulation Advisory Group members serve as ambassadors for the membership. They serve as liaisons, bringing concerns, recommendations, and innovative ideas on behalf of the SWAN Membership to SWAN staff.

LEADERSHIP

Crystal Vela, SWAN Member Services Consultant – Chair

Samantha Dietel, SWAN Member Services Consultant – Co-Chair

2020 COMMITTEE MEMBERS

- Thomas Webb, Matteson Area Public Library District [11/2020]
- Stephanie DeYoung, Batavia Public Library District [11/2020]
- Cheryl Pawlak, Downers Grove Public Library [11/2020]
- Brittany Smith, Westmont Public Library [11/2020]
- Sue Feddersen, Bensenville Community Public Library District [11/2020]
- Sandra Leyva, Alsip-Merrionette Park Public Library District [11/2021]
- Christine Sporleder Bloomingdale Public Library [11/2021]
- Victoria Muraiti, River Forest Public Library [11/2021]
- Debbie Sheehan, Indian Prairie Public Library District [11/2021]
- Peggy Tomzik, Eisenhower Public Library District [11/2021]
- Jeri Cain, Carol Stream Public Library [11/2021]

2020 MEETING DATES

- Wednesday, January 22, 2020 (9:30 AM - 12:00 PM)
- Wednesday, March 18, 2020 (9:30 AM - 12:00 PM)
- Wednesday, May 20, 2020 (9:30 AM - 12:00 PM)
- Wednesday, July 15, 2020 (9:30 AM - 12:00 PM)
- Wednesday, September 16, 2020 (9:30 AM - 12:00 PM)
- Wednesday, November 18, 2020 (9:30 AM - 12:00 PM)