

Issuing cards to Patrons:

Check to see if patron has a card from another automated library. Patrons should have ONLY ONE MEMBER LIBRARY CARD. When registering patrons, ALWAYS ADD A BIRTHDATE to help libraries determine whether this is a duplicate patron.

Case 1:

Patron has no card at any library. If the patron lives within your service area, issue him/her a card, checking his/her address according to your policies. You can ask patrons who live outside your service area whether they would prefer to get a card at another library if you think it's more appropriate. Note: Patrons from areas that have no library are eligible for Central Library (Plattsburgh) cards, but other libraries may choose to issue them a card instead.

Case 2:

Patron has a card at another library and lives in the service area of the other library. Inform the patron that they can use their card from the other library to check out items at any library in the system. Encourage the patron to keep the card from the library they are associated with. If the card is expired, renew cards for any library by verifying address and phone number. You may edit the address and phone number for the other library's patron. **Ask to see driver's license, and if the address has changed, also photocopy it and send it to the home library.**

Complication: The other library's card has monetary blocks

Inform the patron of the problem and urge them to clear up the fines and fees at the other library. You may collect the fines if the patron is willing to pay. If under \$5, your library keeps the money, if \$5 or over, send it via delivery in an envelope addressed to the library director. If the patron pays, **only clear the amount they pay on Horizon if you are keeping the money – i.e. if it is under \$5. If you are sending the money to the home library, put a note on the patron account that the patron paid, and include a note with the money telling which patron paid it, and that it was not cleared.**

If the patron cannot pay part or all of the fines, you must follow your library's policy, if it has one, to decide whether to check out items to the patron. If there is no policy you must use your judgment. **Patrons owing over \$10 should not be allowed to check out items.**

Case 3:

Patron has a card at another library but has moved into your service area. Encourage the patron to switch to your card. Check to see if the patron has blocks or checked out items on their other card. If they have a card with no blocks or checkouts, you

may edit the existing patron record, changing the location, borrower type and barcode to your own. As a courtesy, let the previous home library know about the transfer.

Complication: The other library’s card has monetary blocks or checked out items.

Inform the patron of the problem and urge them to clear up the fines and fees and return all books owed at the other library. You may collect the fines if the patron is willing to pay. If under \$5, your library keeps the money, if \$5 or over, send it via delivery in an envelope addressed to the library director. **Only clear the amount they pay on Horizon if you are keeping the money – i.e. if it is under \$5. If you are sending the money to the previous home library, put a note on the patron account that the patron paid, and include a note with the money telling which patron paid it, and that it was not cleared, and that the patron is changing their home library to your library.**

If the patron cannot pay all of the fines, **do not issue a new card or check out items to the patron.** If you wish you may call the home library to discuss the issue.

	Lives in Your Area	Lives in Another Area
No Card (please search in CKO to verify this)	Issue patron a card, checking his/her address according to your policies.	Ask patron whether they would prefer to get a card at another library if you think it’s more appropriate. Note: Patrons from areas that have no library are eligible for Central Library (Plattsburgh) cards, but other libraries may choose to issue them a card instead.
Card from other library - No Blocks	Encourage patron to switch to your card. Edit the existing patron record, changing the location, borrower type and barcode to your own. As a courtesy, let the previous home library know about the transfer.	Inform patron that they can use their card from the other library to check out items at any library in the system. Encourage the patron to keep the card from the library they are associated with.
Card from other library - Blocks	Inform patron of the problem and urge them to clear up the fines and fees at the other library. Collect the fines if patron is willing to pay. If under \$5, your library keeps the money, if \$5 or over, send it via delivery in an envelope addressed to the library director. If the patron pays, Only clear the amount they pay on Horizon if you are keeping the money – i.e. if it is under \$5. If you are sending the	

	<p>money to the previous home library, put a note on the patron account that the patron paid, and include a note with the money telling which patron paid it, and that it was not cleared. If the patron cannot pay part or all of the fines, you must follow your library's policy, if it has one, to decide whether to check out items to the patron. If there is no policy you must use your judgment. Patrons owing over \$10 should not be allowed to check out items.</p>
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Fines:

Every library has a different fine policy. It is the patron's responsibility to resolve any obligations they have to the circulating library. We also recognize a library's choice to circulate books to all patrons **except those marked delinquent**. Libraries wishing to prevent patrons from checking out books should change their borrower type to the delinquent borrower type for their library – this is serious and should not be ignored by other libraries. There is also a "local only" borrower type for each library which allows the borrower to borrow locally but not to place requests.

Suggested Procedure for patrons from other libraries with blocks:

1. When a block of under \$10 appears on a patron's card, say, "You have an obligation to _____ Library which you need to resolve as soon as possible. We can check out books to you one time but this will be noted on your record. Before you borrow books again, you must resolve the issue."
2. Override the block
3. Put a note block in borrower record. It should say "No more checkouts until fines are paid", and add date, your initials, and the library name. (if you need help with this, call Betsy Brooks)
4. If when you check out books, the note is in the record already and fine blocks still exist, books cannot be checked out.
5. If the fine blocks have been cleared, the note block may be removed by the staff member if allowed.