

CEFCAT Standards as of 05/03/19

The following are practices that the automated libraries of the Clinton Essex Franklin Library System have agreed to follow. While each library has autonomy to determine its own policies and procedures, there are some areas in which cooperation is essential. The practices below have been discussed and approved at meetings of the CEFCAT (CEF Catalog) Group, which represents all of the libraries involved in the Integrated Library System that we share.

1. **Cataloging:** To prevent items from remaining “in cataloging” and unavailable for requests, check in items after cataloging them.
2. **Cataloging:** Brief records should only be used for periodicals and ephemeral paperbacks. Audio and video formats should always receive full MARC records: [Periodical Cataloging](#), [Brief Records](#).
3. **Cataloging:** Always look up new items in Horizon and verify by ISBN and title that no appropriate record exists before sending a request for a MARC record to CEF.
4. **Fast Adds:** Fast adds can be used to check out uncataloged items, but the collection code “FABI” or “ILLFAB” should be used so that these records are deleted on checkin. [Step by Step Fast Adds](#).
5. **Fines:** If a patron has moved, the new home library collects and keeps any fine owed if it is under \$5, and notifies the previous home library about the transfer. Fines of \$5 and over should be sent to the previous home library with notification of the transfer. Patron records should be cleared of charges by the library where the money is ultimately kept and deposited in order to allow accurate cash accounting.
6. **Overdue Notices:** Overdue notices should be generated regularly on every day the library is open, or as often as possible: [Overdue Notices](#), [Overdue Notices with Email](#).
7. **Patron Registration:** A patron should have only one library card, preferably from the automated library in the community in which they live, work, go to school or own real property. The full details of this policy are at: [Circulation Guidelines](#)

8. **Patron Responsibility:** Your library is responsible for communicating with your patrons. The overdue notices you produce may include some for items borrowed from other libraries by Horizon request, CEF rotating collection, or traditional ILL. Libraries should make good faith efforts to recover materials for each other. Libraries are encouraged to change their patrons to a delinquent borrower type if they have lost several items or surpassed a limit set by the library.
9. **Renewals:** There is a system-wide 1 renewal maximum.

An item borrowed from another library may be renewed one (1) time only. The borrowing library must contact the lending library to ask for permission to renew the item more than one time.

Items do not have to be present to be renewed.

Items that have requests on them should not be renewed.

Books that belong to another library and that were checked out from another library can be renewed one (1) time at any library.

Each library should decide who has authority to override the one (1) renewal policy.

Library staff should make patrons aware of the new due date when renewing items.

Libraries should never renew ILL books from outside CEF for another library's patron. Libraries should contact DueNorth lending libraries before renewing any ILL.

10. **Rotating Collections:** Rotating collections are handled according to the procedure at: [RotatingCollections](#).
11. **Record Ownership:** Do not delete or edit other libraries' item records. Do not (waive) forgive fines (of \$5 or over, see number 5 above) or lost item charges for other libraries' patrons.

- a. Libraries MAY edit each others' patron records in two situations:
 - i. if there is an "address correction requested" block on the patron and the patron produces proof of a new address, or
 - ii. if the patron is transferring membership and has a clean record (no items out, no blocks). In this case, the new home library changes the location, barcode and borrower type on the existing record.
- b. As a courtesy, please notify the home library of the changes made.

12. **Requests:** Libraries should check the Pull List every day they are open: [Request Pull List Procedure](#).
13. **Requests:** After responding to the pull list, libraries should change the **status** (to "trace") or **itype** of items they cannot or do not wish to provide, so that the item can be filled by another library. See procedure for Pull List in #11 above.
14. **Requests:** Do not send DueNorth requests to automated libraries. Use the Horizon request system for these.
15. **Transit:** When items with green or orange slips are delivered to your library from automated libraries, check them in to take them out of transit and possibly fill a hold. When sending items to another library, use the green slips to send via CEF, and the orange slips for a library after you on the same delivery route. Put items with orange slips in a separate pile to alert the van driver. Mark the slips appropriately for either "Horizon" or "DueNorth".
16. **Weeding:** In order to delete a bib record when the last item is deleted, weeding is done using the weeding procedure at: [Weeding Procedure](#).
17. **Returning items:** Encourage patrons to return items to the library they checked them out from as much as possible.