

## SWAN Circulation Policy

### 1. General Circulation Rules

- a) Patron blocks and borrowing limits are established by the patron's home library and follow the patron from library to library. Do not override patron blocks or borrowing limits when checking out to a reciprocal borrower unless permission is granted by the patron's home library.
- b) Upon notification of a lost/stolen card, SWAN library staff should block the patron's SWAN record by entering an "e" in the MBLOCK field. SWAN staff should then complete the appropriate paperwork and route same to the patron's home library.
- c) Loan rules (loan period, fine rate, grace periods and number of renewals) are established by the item's owner and follow the item from library to library.
  - i) Libraries may not lengthen a due date but may shorten it to match local policies. If the due date falls on a Sunday or holiday, the library may extend the due date to the next business day. Book discussion loans, which may be extended, are the only exception to this rule.
  - ii) Libraries may change fines to match local policies.
  - iii) Libraries may not override the renewal limits as set by the owning library.
- d) ILL items should not be checked in or checked out on Millennium Offline Circulation when SWAN is down. Manually check out all ILL items. Patrons should be instructed to follow up for due date information either online or by phone.
- e) Hold queues must be honored unless it is your patron and your item.
  - i) When changing priority of any holds, the note field must reflect the date the hold was originally placed.
  - ii) Do not cancel a hold unless the pickup point is your library.
  - iii) When placing a hold, the pickup point must be either your library or the patron's home library.

### 2. Return of Materials

- a) Any item can be returned anywhere, regardless of the labeling on the item.
- b) SWAN library materials are to be checked in and routed to appropriate destination.
- c) Materials from Non-SWAN libraries cannot be checked in, but should be forwarded to the owning library.
- d) According to local practice, the patron may be held responsible for Non-SWAN materials until they reach their final destination.

### 3. Payment of Fines, Bills and Added Charges

- a) Ecommerce payments are credited to the owning library and manual charges are credited to the library posting the charge.
- b) Fines can be paid at any SWAN library. The library collecting the fine keeps the money.
- c) Bills are paid at the library where the patron checked out the materials, except when a patron is blocked as a reciprocal borrower by Metro.
  - i) "Metro CA" charges can be paid at any SWAN library. Patron will be blocked with an "X Metro CA Trans", "Y Metro CA Uniq", or "Z Owes Metro" message. Refer to section 6 of this document for further details.
  - ii) Metro Reciprocal Borrowing will debit the collecting library for the amount of the charge and credit the item's owner.
- d) It is the responsibility of the owning library to invoice the patron's home library for lost or damaged ILL materials within 6 months of the due date.
- e) Replacement materials are not accepted for ILL and Reciprocal Borrowing losses.

### 4. Manual Charges

- a) For ILL transactions do not put a manual charge on a patron record unless it is your patron. Library to library contact should occur to resolve ILL charges.
- b) Manual charges under \$5.00 can be paid at any SWAN library. The library collecting the charge keeps the money. The \$5.00 limit is for individual charges, not the total manual charges owed.
- c) Manual charges over \$5.00 are to be paid at the library that put the charge on the patron's record or via Ecommerce. The \$5.00 limit is for individual charges, not the total manual charges owed.
- d) "Metro CA" fees of \$10.00 can be paid at any SWAN library. The SWAN library does not need to forward the collected monies. Metro will debit and credit the appropriate libraries for these charges.

### 5. Lost and Claims Returned Items

- a) The **Mark as Lost** and **Claims Returned** functions are used when it is your patron and your item involved in the transaction following your local policy.
- b) Only Metro performs Claims Returned functions on Reciprocal Borrowing transactions. This is done in consultation with the patron's home library.

- c) Once a patron is sent to a collection agency, performing a “Claims Returned” on the item is no longer an option.
- d) One year after being reimbursed for lost Reciprocal Borrowing materials, owning libraries receive an ILL/RB delete report. This report is used to clean up the SWAN database.

## 6. Reciprocal Borrowers and Billed Items

- a) If the patron’s record has an “X Metro CA Trans”, “Y Metro CA Uniq”, or “Z Owes Metro” block, the bill can be paid at any SWAN library or via Ecommerce. For money collected at the circulation desk, clear the charges from the patron’s record. **DO NOT** remove the block. The library should inform the patron that the patron block will not be removed until the next business day. The library collecting the charges may override the block and circulate items to the patron.
- b) If the patron’s record has an “X Metro CA Trans”, “Y Metro CA Uniq”, or “Z Owes Metro” block and a “call Metro for details” message in the fines area, patron has reciprocal borrowing charges from a Non-SWAN library and is blocked by Metro. Check the fine area of the patron’s SWAN record for an explanation of charges and call Metro Reciprocal Borrowing for title information. Collect the money and clear the charges from the patron’s record. **DO NOT** remove the block. The library collecting the charges may override the block and circulate items to the patron.

## 7. Registering Patrons

- a) SWAN libraries **MUST** enter a brief patron record (on the fly) or full record on SWAN before issuing a new card to their patron. All patron records must conform to current standards. All brief patron records must be expanded into full records within 3 days of issue.
- b) SWAN libraries should make every effort to verify patron status and circulate immediately to a new or renewing reciprocal borrower.
- c) To register a Non-SWAN reciprocal borrower, refer to the SWAN Circ at a Glance procedure manual found on the SWAN website.
- d) When re-registering a patron, edit the existing public library record following current patron record entry standards. Any outstanding bills must be resolved according to the SWAN Circulation Policy Rule 3C; outstanding fines may be collected and cleared.
- e) A patron record from another SWAN library can **only be edited** when the patron has moved into your service area.

## 8. Renewals Done by Library Staff

Library staff should attempt to renew items for patrons regardless of due date or where they were checked out, except for Interlibrary Loan materials from outside of SWAN.

Interlibrary Loan materials from outside of SWAN must only be renewed at the library where the item was checked out.

### **9. Responsibility of Patron's Home Library**

The SWAN patron's home library is responsible for ALL patron delinquencies for SWAN materials, regardless of where the transaction took place. When all libraries involved in an ILL transaction are SWAN libraries, the patron's home library is responsible for reimbursing the owning library. When a Non-SWAN library is involved in the transaction, the borrowing library must reimburse the owning library for any losses.

### **10. Routing Interlibrary Loan Materials within System**

A new gold book band must be used to route ILL materials within System if item is not being returned to the home library (items that roam).