Minerva Circulation Best Practices

General Use of Sierra & Sierra Web

Close out desktop sessions of Sierra daily to clear .jar files and limit the number of desktop sessions open at any given time.

Sierra Web is a browser-based version, not the more commonly used desktop app. Access to Sierra Web can be found through the Maine InfoNet Support Site. You can use Sierra Web when the desktop version is not available for whatever reason but it is not recommended to use on a regular basis.

You must close out Sierra Web properly when not in use: Go to File → Exit within the module. Do not simply close the browser as this does not end the session, it will remain open indefinitely, and there are a limited number of sessions that can be running at any given time.

A lot of useful information can be found in the Sierra menu bar under Admin → Parameters → General OR Circulation. Take the time to explore these menus.

Important Links

Minerva Website:

www.maineinfonet.org/minerva/

MaineCat Contacts: Best contacts for Library Admin, Circulation, and Cataloging
To update your library's contact information submit a MIN support ticket or email the chair of the Circulation Standards Committee
www.maineinfonet.org/mainecat/libcontacts/

Maine InfoNet Support: Submit support tickets and browse knowledge base
maineinfonet.freshdesk.com/support/login

MSL Van Delivery: ILL delivery labels and Contacts
www.maine.gov/msl/libs/interlib/delivery.shtml

Circulation Roundtable Meetings

Minerva Circulation Roundtable meetings are held quarterly. It is required that no fewer than three of the four meetings in a calendar year are attended or viewed by a library circulation representative.

1. If two meetings are missed, an email will be sent to the library director by the chair of the Circulation Standards Committee
2. If a third meeting is missed, the Executive Board will be informed and asked to contact the library
3. If a fourth meeting is missed, OPAC requesting privileges will be disabled
4. To regain the ability to place requests, a library circulation representative will need to view the last three missed meetings and resume attendance of meetings

For more information see the Circulation Roundtable Attendance Policy

Collections & Material Contribution

Any item that normally circulates locally is requestable by any Minerva library. Some exceptions apply (ex. Library of Things items).

Libraries that participate in Minerva understand that they will maintain a commitment to local collection development and are required to run their local High-Demand Holds list monthly and review their patron requests. As a general rule, libraries should consistently maintain a ratio of at least one copy per five local holds on new or high demand items. Instructions on running the High Demand Hold list can be found on page 15 of this document.

For a list of exceptions and more information, visit the Intra-Minerva Request Policy & Minerva Materials Contribution Policy.

Patron Records

Creating a Patron Record

Each patron record must contain **only one** patron name in the (n) field and a 14-digit barcode. The name should be entered as follows: lastname, firstname middle initial (ex. Thomas, William W). No other punctuation should be entered on this line (as per

Maine InfoNet in order to maintain the systemwide database integrity) and only one (n) field is permitted per patron record.

No other information is required per Minerva Standards. However, libraries are encouraged to include or use the following information:

- Legal name as it appears on their ID
- Phone Number, with area code, hyphenated with no parentheses
- Email address
- Physical address
- Birth date

Legal names are preferred since it is the easiest way to verify patron information and reduce the risk of patrons having duplicate accounts in the system (ex. two accounts once existed at Thomas ML for an Augustus AND a Gus despite them being the same person). This is not required but consistency across libraries enables the system to function better.

There should not be (n) fields where the legal name is followed by a nickname in parenthesis (ex. Thomas, William (Will) Jr) as this violates the "no other punctuation than a comma between lastname, firstname" rule.

Shared accounts should only have one first name in the (n) field, any other names/notes on accounts can be denoted in the (m) message or (x) note field.

Libraries are prohibited from collecting patron social security numbers.

All patron records must expire after one year. Expired patrons with no outstanding charges must be purged from the system after three years.

It is permissible to create dummy records for internal purposes, such as "TML Cataloging" or similar records. All such record names must start with the three-character abbreviation for the library (i.e. TML, BML, etc). Interlibrary loan items requested on these accounts may not be used for displays and must adhere to all limitations imposed by the system, such as hold shelf duration, circulation periods, and renewal eligibility.

Patron names with suffixes can be handled based on individual library workflows. Using *Lastname suffix, Firstname* requires the suffix to be known in a general patron search (i.e. searching for patron Thomas Jr, William W using "Thomas, William" will not bring up the correct result) while *Lastname, Firstname suffix* will print on notices as Firstname Suffix Lastname (ex. William W Jr Thomas).

Edit/View Patron Information

Click on Function → **Check Out (Circulation Desk)** and scan patron's barcode or enter nlastname, firstname.

To view only, click on the **View** icon at the top right of the screen. You can also mouse over the ⓘ far right of the patron record display to get an abbreviated pop up view.

To edit information, click on the **Edit** button on the top right of the screen. You can double click the white fixed-length fields (ex. Patron Type) in the top half of the record preceding the variable-length fields (ex. Patron Name). Both variable and fixed-length fields can be edited by just typing or right clicking and selecting **Edit** for more options.

				Insert	Save/Clo	Delete	Add to R.	Print	Close

p11391844   Last Updated: 07-31-2025   Created: 01-15-2001   Revisions: 2657   ****Fixed Length Fields****

EXP DATE	12-01-2025	HOME LIBRARY	tml Thomas Memorial Library	ILL REQUES	0
PCODE1	- -	PMESSAGE		CUR ITEMC	2
PCODE2	- -	MANUAL BLOCK	- NO BLOCK	CUR ITEMD	0
PCODE3	255 Unassigned	CL RTRND	0	PCODE4	1257 tml internal
PATRON TYPE	187 tml other	MONEY OWED	$104.99	CIRCACTIVE	07-31-2025
TOT CHKOUT	1271	BLK UNTIL	- -	Notice Preference	z EMAIL
TOT RENWAL	155	CUR ITEMA	0	Total Registrations	0
CUR CHKOUT	17	CUR ITEMB	0	Total Programs Attended	0
BIRTH DATE	- -	OD PENALTY	0	Waitlists on Record	0

Variable Length Fields

PATRON NAME	TML Interlibrary Loan
EMAIL ADDR	tmlstaff@thomas.lib.me.us
P BARCODE	22375000000026

To insert additional information, click on the **Insert** icon and select the appropriate field from the drop down menu. After making changes, click **Save**. Click on **Close** to exit.

Notice Preferences & (z) Email Field

Within the patron record, the **Notice Preference** field dictates how your patrons receive notices about holds, overdues, and bills.

If no notice preference is indicated, but there is a valid email address in the **(z) Email Addr** field, the patron will receive automatic email notifications.

To set up a patron's account so there are multiple email addresses, string the emails together in one single (z) field, separated by a comma (no space). If you include a

space between email addresses the system will ignore anything after the space. The second address will not get a notice. Similarly, if you put a second (z) field, the system will ignore it and only send to the address listed in the first (z) field. It will email as many addresses as you like as long as they are included in one field delineated by commas and no spaces.

If notice preference is set to **(a) Call Patron / Print**, no automated notifications will be sent to the patron but they will be pushed to library-set printers or emails depending on local notice printing settings.

Patrons can opt in to receive text message notifications through "My Library Account" found on the Minerva OPAC at minerva.maine.edu/patroninfo → Modify Personal Information. Once patrons opt in to text messages an **(o) Mobile Phone No.** field will automatically be added to their patron record in Sierra by the system. Library staff should not add an (o) field themselves. Patrons need to click through the opt-in online and agree to receive these notifications. Also, be careful not to delete this field in the patron's record. If you do, the patron will stop receiving the messages they have asked to receive.

Integrity of Records (Non-interference)

In order to preserve the integrity of records, and to facilitate the movement of materials across the network, no member may edit or otherwise alter item or patron records belonging to another member.
The ONLY exceptions to this policy are as follows:

1. Library A sends an electronic or postal notification to a patron registered with Library B and receives notification that the email or postal address is incorrect

2. **An owning library receives payment for a billed Minerva inter-library loan item**

In this instance, the owning library must access the billed patron's account, select the **system generated** replacement charge for their item on the account (not the manual charge) and collect the amount. The borrowing patron's library should **never** change the status of another library's item.

3. In special circumstances concessions to these rules may be made if the borrowing library receives permission from the owning library

For more detailed information see the Integrity of Records (non-interference) Policy

View Checked-Out Item Information

To view information about an item that is already checked out on a patron account click on Function → **Check Out (Circulation Desk)** and scan patron's barcode or enter nlastname, firstname.

1. Select the **Checked-Out Items** tab on the left side of the screen
2. Right click on the checked out item and select → **View This Item**

The pop-up will default to the Record view. On the left hand side of this pop-up are options to view the Summary and the various types of Holds. Here you can view checkout/renewal/due dates and other helpful information.

If you click on → **Summary**, you will be able to see all the items attached to this Bib record. When a patron asks to renew an item but there is a hold on that Bib, checking this list of items will let you see if there are available copies in the system which will fulfill that hold. If there are, it is permissible to override the block and renew the item. If there are not, the item should be checked in to fulfill the hold.

View Fines Information

Within the patron record, click the → **Fines** tab on the left hand side of the screen. Once that tab is clicked, a number of buttons become available on the right hand side of the screen. You can always right click on the listed items and select → **View This Item** to bring up the record for additional information.

- **Collect Money** allows you to collect on an outstanding fine
- **Waive Charges** allows you to waive outstanding fines

For each of these, you first need to select the fine(s) you would like to collect or waive.

- **Add Charge** allows you to add manual charges to a patron account

When you click this button, a pop-up appears. On the dropdown are a number of predefined charge options for common tasks, such as adding a manual charge when paying another library for your patron's billed item. You do not need to choose from these if you'd rather create your own. Whatever you type in the "Reason" text box is what will appear as the "Title" of the fine. Enter an amount and select → **Ok** to place the charge on your patron's account. Fines entered in this manner will appear as **Manual** in the Status column. Fines generated by the system for billed items will appear with the

status **Replacement**. Overdue charges appear as **Overdue**, items marked as lost appear as **Lost**.

- **Fines Paid** allows you to see any fines that have been paid by this patron in the past

This will show what type of fine it was, the title (either of the item for system generated fines or whatever you typed for manual fines), the amount due and the amount paid, which will differ if all or some of the fine was waived, and the date paid.

- **Patron Notes** will simply display whatever is typed in the Note field within the patron record, which is not necessarily related to fines but is viewable in a pop-up here.

Reading History

Your library needs to opt in to Reading History in order for your patrons to access this feature in the OPAC. To do so, submit a support ticket to Maine InfoNet and provide the patron types you would like to have access (ex. Thomas Memorial Library's patron types are 185-187).

To find all your patron types click on Admin → Parameters → General → Patron Type. Sort by Label to find all your designated types.

Patrons will then need to opt in to the reading history themselves through "My Library Account" in the OPAC. Reading history is not retroactive and only saves from the opt in date going forward, nor is it viewable by library staff in Sierra. Patrons must delete all items saved before they can opt back out of the Reading History.

Placing Holds

With the implementation of PINs the preferred method for placing holds is for patrons to do it themselves through the OPAC. This is, however, not always the best customer service practice at the desk.

The implementation of PINs means that for staff to place a request on the patron's behalf, they will either need to place that request through the Sierra desktop module or ask the patron for their PIN at the time of service to place the request through the OPAC. Which method works best for you will likely vary on a case by case basis but since placing holds through Sierra is now the norm rather than an exception, please review the best practices that follow.

First scan the requesting patron's card into Sierra to verify their account is valid and up to date before attempting to place any holds.

There are two types of holds or reserves in Minerva: **Title-Level Holds** (also known as Bib-Level Holds or Copy Returned Soonest Holds) and **Item-Level Holds**:

- Most holds should be placed as bib-level holds, with limited exceptions. This method ensures that your patron will receive the first available copy of a title; if there is a long waiting list, your patron will get your item(s) first even if patrons from other libraries have been waiting longer.

- If the volume field was used in the item record because there are multiple volumes attached to one bibliographic record, you must place an item-level hold by clicking "Hold Selected Items". The system will not force an item-level hold like the OPAC will. If you accidentally place a bib-level hold on a record with volume fields the hold will still be fulfilled, however the system defaults to the first item within the record, not any specific volume you may have intended to request.

  If there is a volume field in an item record where there are no actual volumes being indicated (ex. just noting which number a book is in a series), contact the cataloger at that library and ask them to edit their item record to remove the volume field.

To place a hold through Sierra:

The **Search/Holds** Tab:
1. Enter the title or author of the item
2. Select a bib record that includes a [local library] copy, or if [local library] does not own, select the record with the greatest number of items attached
3. Go to tab → **Bib Level Holds**
4. **Click → Add Patron**
5. Select barcode or patron name from the drop down menu
6. Scan the patron's barcode or type in their name
7. The "Place a Title-Level Hold" screen will pop up
8. Click → **Ok**
9. Select → **Page for Title** when that screen pops up – the item is now on hold

The **Check Out (Circulation Desk)** Tab:
1. Type in the patron's name or scan in their barcode
2. Go to the **Holds** tab

3. Select → **Add Holds**
4. Enter the title or author of the item
5. Select a record that includes a [local library] copy, or if [local library] does not own, select the record with the greatest number of libraries
6. Select → **Hold Copy Returned Soonest**
7. The "Place a Title-Level Hold" screen will pop up
8. Click → **Ok**
9. Select **Page for Title** when that screen pops up – the item is now on hold

Once an item is placed on hold, patrons are notified by the automated system or by library staff. Items are placed on the hold shelf for one week and should be cleared regularly by the Hold Cancellation Notices.

Modifying Holds

Sierra will permit library staff to modify a hold request in several ways:

If a patron does not want their request to be fulfilled before a certain date, this modification can be done after the hold is placed by highlighting the hold under the **Holds** tab in the patron record, clicking → **Modify Holds**, then entering the modification.

Library staff can also move a patron up or down on a list of holds by "changing priority" of the hold. This is done when there is a system malfunction or staff error placing the hold. It should not be done on a regular basis. A brief explanation with staff initials should be entered in the **Hold Note** field.

If an Item-Level hold is stuck due to a missing status or other reason you can transfer it to a Bib-Level hold. To do this go to **Search Holds**:
1. Select the item with the stuck hold
2. Click on the left tab labeled → **Item-Level Hold**
3. Click → **Transfer Holds**
4. Confirm the transfer is to the record that starts with **b**12345678
5. Click → **Ok**

Cancel Holds/View Cancelled Holds

If a patron wants to cancel a hold from home:
1. They need to login to **My Library Account** through the OPAC
2. Check the box next to the title(s) they wish to cancel → Click **Cancel Selected**
3. The OPAC will prompt "The following hold(s) will be updated. Would you like to

proceed?" → Click **Yes**

    4. Hold has been cancelled

If patron requests staff to cancel a hold:
1. Click on Function → **Check Out (Circulation Desk)** and scan patron's barcode or enter nlastname, firstname
2. Go to the **Holds** tab in the patron record
3. Check the box next to the title(s) they wish to cancel → Click **Cancel Hold**
4. A prompt will ask "Notify patron of cancelled hold?" → Choose **No** if they have asked you to cancel, **Yes** if there is the potential need for the patron to follow up with your library. If **Yes**, select the appropriate **Hold Cancellation Notice**
5. Hold has been cancelled

To view cancelled holds:
1. Go to the **Holds** tab in the patron record
2. Click on → **View Cancelled Holds**

Cancelled holds are retained in the patron's record for one month. In this view you can see the date placed, date cancelled, and how the hold was cancelled (under the Program column).

"Programs" Used in Cancelled Holds:
Clear Holdshelf: the hold expired and was cancelled automatically by the system
Web OPAC: the hold was cancelled by the patron through "My Library Account"
Sierra Desktop: the hold was cancelled by circ staff using Sierra - the "Login" column will show which staff login was used to cancel the hold

This information can be useful when there is confusion about why a hold was cancelled.

If a hold was cancelled and the patron would like to reinstate the hold, from **View Cancelled Holds** you can either select: **Place Title Hold at Queue End** or **Insert Title Hold by Original Placed Date**.

Use **Place Title Hold at Queue End** if your patron is unable to pick up an item right away but would still like to have the book on hold for when it finally becomes available.

Use **Insert Title Hold By Original Placed Date** if your patron lets you know they will not be able to pick up the item right away, but shortly (out of town, etc.), and they let the next person get it ahead of them, effectively just moving them a few slots down the hold list.

Clear Expired Holds

This should be run twice a week at the very least, if not daily, in order to ensure fair distribution of holds and items going back to their home library in a timely manner.

1. Click on Function → **Clear Expired Holds and Holdshelf**
2. Under **Holds**, select → **Expired holds and holdshelf** or **INN-Reach Holdshelf**
3. Choose **View** or **Display** for a list of clearable holds
   a. Right click on any hold to view details or click **Hold Detail** button
   b. To print list use the upper right corner **Print** icon
4. To clear the holdshelf click → **Clear**.

A list of items will be displayed and what needs to be done with them. If you have your **Hold Cancellation Only** notices set to Auto they will be queued up to go out with the next cycle of notices, otherwise send them manually.

Extending (Renewing) Checkouts

Most intra-Minerva items may be renewed once unless they are significantly overdue or requested by another patron. As long as the system allows the renewal without a message/warning, it is fine. If the patron would like to keep the item beyond one renewal period, contact the owning library's circ staff and **ask** to override the block for a second renewal.

If a patron is looking to renew a title themselves through the OPAC but a hold exists on the bib record, even if there are available copies on that bib record, the OPAC will not grant the renewal. However, in this situation, instead of waiting for one of those available items to fulfill the hold and clear that block, library staff can (and are allowed to) renew these items through the patron account in Sierra with the override button. Before simply clicking override, follow the steps in the section **View Checked-Out Item Information** to ensure there are, in fact, available copies in the system that will fill the outstanding holds. If there are not, it is not permissible to force the renewal through.

MaineCat items can likely be renewed once as well (there are a few cases where a renewal will not be allowed). If the system will not let the item be renewed, staff are **not permitted** to override a system message/warning regarding a MaineCat item to add another renewal. Extra renewals on MaineCat items do not work and the item will appear as overdue to the lending library and you may receive a bill for the item.

To renew an item:
1. Once in the patron's record, go to the **Checked-out Items** tab
2. Select the item for renewal and click on **Renew**

<div align="center">or</div>

Click on the **Renew** tab and scan the item. A box with the patron's name will pop up. Confirm patron ID and click **Ok**

3. Inform patron of new due date

Broken Holds - MaineCat/INN Reach items

These can be items that appear as checked out on a patron record when they aren't or items that give a message they are checked out remotely when they are actually in hand; most need to be sent to the Innovative Help Desk to be resolved but some can be fixed locally by library staff.

Before sending a request for a broken hold to be removed, change the status to **(@) IR OFF Site**. Close the item record and scan it through **Check In**, then try again to perform the desired transaction (checkout, deleting the item record, etc.) In many cases this will clear the old hold; if it doesn't, submit a Broken Hold request ticket to Maine InfoNet Support.

Other Circulation Functions

High Demand Holds

1. Under Function → Circulation, select → **High Demand Holds**
2. Under **View Report For** the default selection is **System-Wide Thresholds** which will show total holds and total items in the system. This can be helpful for determining items that may not be high demand locally yet but could be soon. To view your local High Demand Holds, choose → **Selected Pickup Location**
3. Select your library from the dropdown menu
4. Click on → **Create Report**
5. All fields may be sorted within Sierra by clicking the column headings or the entire report can be exported to Excel

Manage Holds

The **Manage Holds** module allows libraries to manage holds on their items and by their patrons. To run these reports:

1. Determine how you want to display the results
   a. Select the dates for **Holds placed between**
   b. Select the type of report you would like. For instance, selecting "On Hold" will generate a report of all outstanding holds your patrons have placed.

2. **Pickup Location** and **Item Location** both default to your home library but can be changed based on what results you hope to obtain from the report. If you leave Pickup Location alone and change Item Location, the results will show other libraries' items headed to your patrons. You can change that to **All** for a full system search or specify a particular library if there's a specific issue you're investigating. If you change Pickup Location and leave Item Location alone, the report will show your items headed to other library's patrons. As before, selecting All will do a system-wide search while selecting a particular library can be helpful for investigating specific issues.
3. Click → **View Outstanding Holds**
4. Once the report is generated, you can sort by clicking the column headers within Sierra or export to Excel.

Entering Days Closed

The specific dates of many holidays change from year to year, and ensuring your "days closed" are accurate in the system is important in determining appropriate due dates for items. This needs to be done annually, preferably at the start of the year or at least three weeks before a closed date in order to accurately depict due dates for items.

In the Sierra menu bar, go to Admin → Parameters → Circulation → Days Closed

You may need to submit a ticket to Maine InfoNet for permissions to edit Days Closed. Generic Circ logins are unlikely to have these permissions.

To ADD a new entry: click on the row where your new entry would go and click **Insert**.
1. For your location, use the first three letters of your location (or two if you're one of those places) followed immediately by an asterisk. (ex. apl*, as*) Don't use spaces, don't use multiple asterisks
2. Enter dates with two digit months and days (ex. 02/21, 09/05), or an abbreviation of the full day if you're always closed on a particular day of the week (ex. sat, thur)
3. Keep all of your entries together in chronological order

If you need help, please submit a ticket to InfoNet Support

To MOVE an entry in the wrong place: select the entry row to move, click the **Move** button, enter the number of the line you want to move it to.

To MODIFY an existing entry: select the entry row to change and click the **Edit** button.

To DELETE an entry that you don't need: select the entry row to delete and click the **Delete** button.

When you have finished → **Close and Save changes**. The table will take a really long time to process the update. If you need to do something Circ related in the meantime, you can open up another session without doing any harm.

Please remember to close out as soon as you are done, since only one person in the entire system can be in this table at once including the time it takes for the table to update. If you get the error message that someone is already in the table, try again later. You will be able to see the table, but you will not be able to make any changes (the buttons will be greyed out).

Notices

Notices need to be run regularly in order to preserve the integrity of the system. It is recommended that all notices be run daily but at a minimum the following system notices must be run at least twice a week:

1. Overdues (1st, 2nd, and Highest Level)
2. Bills
3. Hold pick up notices
4. Hold cancellation notices
5. Item paging slips
6. INN Reach paging slips
7. Title paging lists
8. INN Reach Report
9. Clear Expired Holds and Hold shelf

Title paging list, Item paging slips, and INN Reach paging slips requests should be fulfilled promptly.

You can save your frequent jobs such as Title & Item paging, INN Reach paging, Bills, Overdues, etc to facilitate quickly running these lists to your library's printing/sending specifications. **It is recommended that Overdue and Hold Pickup Notices are run automatically systemwide.**

Minerva standard timeline: 1st Overdue = five days overdue, 2nd Overdue = 10 days overdue, Bill = 20 days overdue. This may vary for local circulation depending on your library's loan rules.

To view your loan rules:
In the Sierra menu bar, go to Admin → Parameters → Circulation → Loan Rules

All automatic notices are queued to go out every four hours beginning at 7:00am EST.

For more information view the Notices Policy.

Interlibrary Loans

Generate Paging Lists

There are three types of paging lists that should be run regularly: Title Paging List, Item Paging List, and INN Reach Paging slips. Paging lists should be run at least once a day, preferably twice. Most Minerva holds will be on the Title Paging List.

1. In Sierra click on the **Notices** icon
2. Double click on selected Job Name
3. Click **Prepare**
4. A Select Form Printer box will pop up
5. Local printer should be highlighted → click **Print**
6. Printer box will pop up with name of local printer → click **Print**
7. System will generate notice → click **Send Notices** → click **Ok**
8. Once printed, clear notices, close out of screen

Repeat steps for Item Paging Slips and INN Reach Paging Slips.

Place Item(s) In Transit

Items paged within MINERVA (on Title Paging List or Item Paging Slips)

1. Select **Check In** from Sierra's Function menu
2. Inspect all items to ensure that any significant damage is noted and that AV items are complete and unlocked (if you use locking cases)
3. Scan item barcode
4. Pop up screen appears → select **Fulfill Hold**

5. Pop up screen states patron name and home library → select "set status to **In Transit**"
6. "Print Transit Slip?" → select **Yes**

For Minerva Paged Items - Not Found

If another library owns the item – change the status of your item to **(m) Missing** and **DO NOT CANCEL THE HOLD**! Sierra will select another copy to fulfill the hold automatically.

If you are the only owning library:
1. Change the item status to **(m) Missing** & cancel the hold
2. Select **Yes** to "Notify Patron of Canceled Hold?"
3. Choose Hold Cancel Message → **Minerva Drop Hold**
4. (Notice will print at requesting patron's library)

Items Requested by INN Reach Libraries (MAINECAT)

Setting INN Reach Items in Transit

1. Select **INN-Reach Check out to Remote Site** in the Function menu
1. Inspect all items to ensure that any significant damage is noted and that AV items are complete and unlocked (if you use locking cases)
2. Scan item barcode
3. Pop up screen stating status of IR paged and where to send item
4. Select → **Ok**
5. Sierra will not automatically print a transit slip for INN Reach items. To print a transit slip, click the Print icon in the top right corner

For INN Reach Paged Items - Not Found

1. Open up Item Record for missing item(s)
2. Change the status of your copy to **(m) Missing**
3. Go to **Item-Level Holds**
4. Click → **Cancel Holds**
5. Select the appropriate reason for canceling the hold

Packaging ILLs

All outgoing materials must be placed in a bag with the appropriate label and placed in a tote. Remember to remove any prior labels off totes before sending them out for pickup.

If you have many materials going to the same library, you can place the items loose in a tote (no bags required), zip tie the tote closed firmly, and firmly affix a label to the top of the tote.

- All CDs, DVDs, and any other AV material should be packaged in bubble wrap or other protective material
- All items must be sent in totes. No exceptions
- If short on bags, you may use padded mailers/boxes, provided these fit inside totes. They must be clearly labeled with the appropriate delivery label
- **Do not** use tape directly on materials belonging to other libraries. **Do not** use staples on any packaging materials

Unpacking Items - Condition of Materials

When unpacking ILL materials and **before checking in from IN TRANSIT status,** please note the following:

- Count discs and pieces & confirm all parts are present and intact
- Review condition of materials – Note any damage on the item(s) & notify owning library (ex. loose binding, broken case, broken disc, missing parts). Notes should not be taped or written in another library's item. Use sticky notes or slips of paper

Clearing In Transit Status

All items must be scanned into Sierra in the function: **Check In (No Patron)**

- Your library's items' status will return to **(-) Available**
- Incoming ILL's for your/another library's patrons, when checked in, will prompt for a holdshelf or transit slip

Returning ILL Items

When an ILL item is returned by your patron, scan it in using the **Check In (No Patron)** function, as you would any material and a message will pop-up, either indicating that another hold exists on this item or that it is headed back to the home library. Follow the prompts to fulfill the hold or:

- Select → **Set status to In Transit. Check in**

The item has now been checked off your patron's record and has a status of **In Transit**, accurately reflecting that the item is on its way from one location to another.

- Print slip, place it with the item and prep item for ILL delivery

Delivery Contacts: Issues

Visit the Maine State Library's Van Delivery page to submit issues with missed deliveries, damaged items, etc. using their feedback form.

Interlibrary Loan Questions or Problems

General questions should be posted to the Circulation listserv: minervacirc@lists.maine.gov

When library specific questions or problems arise during the Minerva Interlibrary Loan process the ILL/Circulation contact is encouraged to contact their counterpart.

If it becomes necessary for one library to address a problem with another library below is the suggested best practice:

1. Address at staff level (library to library)
2. Address at director level (director to director)
3. Ask for guidance or assistance from the Circulation Standards Committee/Chair
4. Contact Chair of the Minerva Executive Board
5. Action of the Minerva Executive Board

The Intra-Minerva Pattern Tracking form may also be used in the event of an issue. The form is used to collect information about issues between Minerva libraries. The data will be used to examine trends and advise the Executive Board if training, policy adjustment, or other formal action needs to be taken. Submissions are confidential and will only be used by designated people to do followup as needed.

The Intra-Minerva Pattern Tracking form can be found at: www.maineinfonet.org/minerva/governance/executive/

Settle Up Procedure

Billed ILL items

Minerva standard is that patrons receive automated overdue (email only) notices at 5 and 10 days overdue; at 20 days overdue bills are generated. Local loan rules for notices may apply to local items. When a bill is sent to a patron, a copy (either physical or electronic) should also be sent to the patron's home library within 14 days of the bill being generated. These copies can be mailed but **DO NOT** send any bills or payment through the van delivery system.

Prompt Billing of Minerva Libraries Policy

Libraries within the Minerva Consortium are obligated to inform a Minerva patron's home library within 14 calendar days when an interlibrary loaned item has reached the status of billed (20 days overdue).

*A copy of the patron's bill, either physical or electronic, must be sent to the primary circulation contact of the borrowing library at the same time the patron bill is generated. Again **DO NOT** send any bills or payment through the van delivery system. If the owning library does not notify the patron's library within 14 calendar days, the patron's library is not obligated to pay the bill.*

*This advanced notice will allow the patron's home library to help facilitate the return of the billed item. If the item is not returned after **45 days from the due date**, the owning library then bills the borrowing library directly. The borrowing library is now responsible for payment of the item to the owning library. This payment should occur within a one-month period. It is permissible to negotiate paying market price or supplying a replacement copy in lieu of payment but any such change to the supplied bill is at the discretion of the owning library.*

When received at the patron's home library, this bill should be kept until the patron returns the item or the 45 days have passed, at which time the borrowing patron's library is responsible for payment.

When the borrowing patron's library pays the lending library for an item, it is generally recommended that they add a **Predefined Charge** under the **Add Charge** tab on their patron's account. This charge is prefilled with customizable fields. Customize "ILL PAID: Title/author, date paid 00/00/00, Initials" to reflect the item being charged for. This manual charge will enable the patron's library to track payments made on behalf of their patron after the item has been deleted or replaced by the owning library.

When this manual charge is added, your patrons will see a double charge on their

record until the owning library receives payment for their billed item and removes the system-generated replacement charge from your patron's record.

REMEMBER: The status of another library's item should not be changed without contacting the owning library first. Do not "Collect" the charge on an item that does not belong to you!

How to Handle Payment that Precedes a Bill

If your patron is convinced the interlibrary loan item is lost, encourage them to wait for the owning library to send a bill before paying. If they admit to damage and want to settle up you can accept payment in the moment, however always reach out to the lending library with any questions. Some libraries appreciate being able to review an item before billing for damage so they may ask you to send it back through the delivery for evaluation. Depending on the severity of the damage you might be able to just take photos and email the lending library for confirmation that they would like to bill your patron.

1. Ask the patron to write a check out to the **loaning library** (NOT the patron's home library).

Any form of payment can be accepted but if you take cash/credit/etc. your library will likely then need to generate a check for the owning library. Sending cash through the mail is ***strongly discouraged***. How your library handles converting these payments to checks may require soliciting an invoice from the loaning library

2. **Do Not** check in or mark item as lost
3. Print out the bib record (highlight title, etc.) or invoice and include your patron's identifying information before mailing payment

Contact the owning library and ask them to remove the item from your patron's account once payment has been received. This will not only allow the owning library to replace an item quickly, it will also preserve the integrity of the fines paid reports that some libraries run daily.

If your patron pays for a damaged interlibrary loan item, it is not necessarily the case that they will be able to keep that item. That determination is made by the lending (owning) library.

MaineCat Billing/Settling Up

Long overdue MaineCat items will not appear in the normal billing process. Occasionally when running bills you may get notices of INN Reach items billed to your patrons. You are not required to send those notices to your patrons but it never hurts in terms of getting the items back.

 To find overdue items:
1. Go to Function → **INN–Reach – Reports**
2. Under Report Type select → **Institutional Overdues**
3. Adjust parameters and select your location

The other report types are also useful in tracking INN Reach items or checking for stuck holds. These reports take a long time to prepare so be patient.

If an INN Reach request is paid for by the MaineCat library they will need to check in the item on their end before the record can be edited/deleted in Sierra
1. Once that has been done go to → **Check-In (No Patron)** and scan the item's barcode to clear the "Checked Out to Remote Site" status
2. Go to Function → **Search / Holds** to edit your item record as ($) paid or (w) withdrawn

Long In Transit Procedure

After 45 days an item is considered lost in transit

The last patron's borrowing library is responsible for payment of replacement cost to the item's owning library regardless of where it was scanned to "In Transit". The owning library is responsible for billing the library that set their item into transit. The owning library should check their shelves for the item **BEFORE** billing.

Creating a Long In Transit List

There are a variety of ways to run this long in transit list to suit your information needs, this is just one clean version.

1. Select → **Create Lists** in Sierra's Function menu
2. Select an empty slot (this report tends to be small so the smallest available will generally suffice)
3. Click → **Search Records**
4. In the **Review File Name** box → name the list starting with your library's three

letter designation (ex. TML)
   a. Choose **Item** in the "Stored Record Type" menu
   b. Change drop down selection from **Range** to **Index**
   c. Change drop down selection from **Title** to **Barcode**
   d. Enter your item barcode range
   e. For parameters, select ITEM (i) under Type, UPDATED (84) under Field, LESS THAN (<) under Condition, and a date more than 45 days previous (roughly 7 weeks) under Value A
   f. Click → **Insert Line**
   g. For parameters, select ITEM (i) under Type, STATUS (88) under Field, EQUAL TO (=) under Condition, and IN TRANSIT (t) under Value A
5. Click → **Search** then → **Yes**
6. Double Click on the completed search to open up your list
7. **Check your shelves and scan any found items before billing** - exporting the list into Excel can be useful for refining your retrieved data

Misc.

Item Statuses

Often these status codes are confusing to both staff and patrons. Items with statuses that aren't apparent (i.e. Available, Local Use Only, etc.) should be assumed to be not readily accessible for circulation. If another copy is available, staff should help patrons locate that copy. Library staff are encouraged to contact the owning library if an item has a special status type.

Requestable and Non-Requestable Item Statuses

Item statuses that are not requestable (The message "This item is not requestable" is generated when an attempt is made to place a hold. Note: Staff are able to override the code when placing requests in Sierra, so care must be taken before placing any requests in Sierra.):

$ = paid
c = temporary closure
k = online
l = lost
m = missing
n = billed - *Set by system when bills are processed* - ***do not change a status to Billed***
o = library use only
q = unavailable (only Maine InfoNet staff may assign this status)

r = in repair
w = withdrawn
z = Claims ret'd

Items statuses that are requestable, but will not page:
b = at bindery
d = story time
e = in tech services
f = on display
g = ask librarian
i = Faculty use
5 = local use only
! = On holdshelf

Item statuses that are requestable, do not page, but are temporary statuses that will trigger a hold when the status is cleared:

= MaineCat Received
% = MaineCat Returned
& = MaineCat Requested
(= MaineCat paged
@ = MaineCat offsite
) = MaineCat Cancelled
p = in processing
t = in transit
a = on order
+ = renew pending (???)
= = renewal denied (???)
– = MaineCat rerequest (???)

Creation of On-The-Fly Records

Occasionally circulation staff need to create a short bibliographic record in order to check out material. These records MUST BE completed or deleted when the item is returned to the owning library.

More information and instructions on how to create On-The-Fly records can be found at Maine InfoNet Support Center Knowledge Base → Minerva → Circulation → On The Fly