



Resource Sharing Alliance
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11 December 2024

Subject: Resource Sharing Alliance Patron Notes Policy

Patron Notes:

1. Notes are to be used for internal alerts such as: Need telephone number; Need birth date; Mail returned; Do not honor this card; etc.
2. All notes should include the date entered, initials of staff, and library name:
8-16-25 (BODY OF NOTE) MT/WASHINGTON PL
3. Notes should contain factual non-bias information.
4. All libraries are to remove unnecessary notes on their patron's accounts.
5. If the note contains nonvital information, such as update email, please put REMOVE NOTE or PLEASE DELETE WHEN UPDATED. Whoever completes that task may then remove the note, regardless of library. Important information like information about damage should be left until the library who created the note is informed by the library resolving the issue.

Approved by the RSA NFP User Group on 1 March 2012

Last Revised December 2024

Approved with Revisions by the RSA Board of Directors XXXX



Subject: Damaged Material Policy

11 December 2024

For the purpose of this policy, severe damage is defined as substantial and immediately apparent physical damage to an item or a case or missing components.

DO NOT REPAIR ANOTHER LIBRARY'S ITEMS.

Item received damaged at checkout library

1. Any time an item is received with damage, create a CIRCNOTE in the item record in Workflows and attach a note to the item including the following information:
 - a. Item was received damaged
 - b. Description of damage
 - c. Date
 - d. Staff member initials
 - e. Library name
2. If the damage is severe, do not check out to the patron. Return the item to the item-owning library through delivery.
 - a. Check out the item to the item-owning library's RSA created D1500 user account.
 - b. Override any popup boxes to allow checkout to the D1500. Do not remove any holds. This will allow WorkFlows to route another copy of the item to your patron for the hold.
3. If the item is in circulating condition, check out to the patron with instructions not to remove the note.
4. If the damaged item may pose a health risk or biohazard, please note the Item ID and owning library, contact the item owning library, then dispose of the item according to the item owning library's wishes and take the next steps in billing the patron. If an item may pose such a risk they should not be put back into delivery.

Item damaged by patron

1. Call the item-owning library to discuss the damage and determine the next step. (If the library where the item was returned is not the checkout or the owning library, that library will contact the item-owning library). If a patron wishes to resolve the issue immediately, and the damage is unambiguous, the library where the item was returned may elect to apply the bill without consulting the owning library. Bear in mind that it may be to the patron's benefit to contact the owning library.
2. If patron is to be billed, the checkout library (or the library where the item was returned if it was not the checkout library) will create the bill on the patron's account. This is done because the returning library is the one with the current

relationship with that patron. However, they need to speak to the item owning library to see how they wish to bill for damage.

3. The item-owning library has final determination regarding damage.
4. Once it is determined that a patron will be billed, mark the item as Lost using the Mark Item Lost wizard. Some libraries allow patrons to keep damaged material. When payment is sent to the item owning library it needs to include the Item ID so that library can delete that record.

Item received damaged at item-owning library

1. Call the checkout library to discuss the damage and determine the next step.
2. If patron is to be billed, the checkout library will create the bill on the patron's account.
3. The item-owning library has final determination regarding damage.
4. If patron is billed for the full replacement cost of the item, send the damaged item back to the checkout library for review or to keep once bill is paid in full.

If the item is lost or damaged and the bill is never paid by the patron, the item-owning library will absorb the item's cost.

Approved by the RSA NFP Users Group 7 November 2019

Last Revised December 2024

Approved by the RSA Board of Directors XXXXXX

Additional Information


How to add a CIRCNOTE to a damaged item:

If the item is checked out, go to Display User and open the user. Go to the CheckOut tab, find the item and right click on Edit Item Note.

Summary Addresses Extended Info Bills **Checkouts** Holds Routines Suspension Charge History User Groups

Checkouts:1(\$0.00)

Title	Call number	Item ID	Date Charged	Date Due	Recall Date Due	Status	Type
Sociopath : a ...	BIOG GAG	A66700604877	11/12/2024,19:...	12/3/2024,23:59			BOOK



- Bill User for Item
- Change Item ID
- Claims Returned
- Discharge
- Display Holds
- Display Item
- Edit Item Note**
- Mark Item Lost
- Mark Item Missing
- Modify Due Date
- Place Hold
- Renew As Seen
- Renew As Unseen

Retention Schedule for Expired Patron Cards Policy

11 December 2024

- Unencumbered expired library cards should be deleted within 2 years of the expiration date.
- Expired cards with a dollar amount of less than \$25.00 in fines* or lost items** should be deleted within 3 years after the expiration date.
- Expired library cards with a dollar amount of \$25.00 or more in fines or lost items should be deleted 5 years after the expiration date. Patrons sent to material recovery agencies may be retained for 8 years. Patron's home library may make case by case exceptions to retain accounts.
- School and academic libraries should delete all student cards no later than 2 years after the student has graduated.
- Per the [Notification and Billing Policy for Transited RSA Member Library](#) (Approved 11/2019):
 - If the item is lost or damaged and the bill is never paid by the patron, the item-owning library will absorb the item's cost.
- Records for patrons known to be deceased with lost material or bills should be deleted 6 months after their death. If the records are clear the patron's record can be deleted at the library's discretion.

*Excluding lost items, referral fees & processing fees, all other bills shall be removed by the patron's home library.

**If the lost items are owned by another library, contact the item owning library to promptly remove the lost items, referral fees and processing fees from the patron's account. The patron's home library shall then delete the expired card.

Approved by the RSA NFP Users Group 7 March 2013

Last Revised December 2024

Approved by the RSA Board of Directors XXXXXX

