

## V-Cat Council Meeting Minutes

Thursday, September 5, 2019 9:30 a.m.  
WVLS Headquarters, 300 N. First St., Wausau, WI



### Call to Order and Announcements:

Chair T. Blomberg (Rib Lake) called the meeting to order at 9:34 am. Roll call was taken, a quorum was present.

### Members Present:

J. Jochimsen (Abbotsford), V. Calmes (Colby), S. Bedroske (Dorchester), R. Wenzel (Gilman), K. Metzke (Greenwood), F. Albrecht (Laona), K. Roesler (MCPL), E. Clarkson (Medford), D. Kiefer (Merrill), P. O'Connell (Minocqua), C. Hart (Neillsville), V. Roberts (Rhineland) arriving at 9:41 am, T. Blomberg (Rib Lake), C. Huston (Stetsonville), H. O'Hare (Tomahawk) arriving at 9:40 am.

### Via Go To Meeting:

K. Heiting (Grant) leaving early around 11:00 am, C. Lemerande (Wabeno), B. Hardin (Withee).

### Also Present:

M. Derpinghaus (MCPL), M. Stachowiak (MCPL), C. Luebbe (MCPL), M. Pregler (Antigo) via Go To Meeting, K. Wegner (Neillsville), K. Schulz (WVLS), and R. Metzler (WVLS).

### Absent:

D. Frandrup (Antigo) with M. Pregler (Antigo) proxy, S. Schmidt (Crandon), T. Hall (Loyal) with K. Metzke (Greenwood) proxy, L. Peterson (Owen), A. Kuipers (Thorp), E. Brewster (Three Lakes) with V. Roberts (Rhineland) proxy, C. Celestina-Smith (Westboro) with E. Clarkson proxy.

### Approval of the Agenda:

S. Bedroske (Dorchester) moved to approve the agenda as written, seconded by J. Jochimsen (Abbotsford). Motion carried.

### Approval of the June 6 Minutes:

M. Stachowiak (MCPL) asked a question about minutes concerning the portion on holds that cannot be filled. She noticed that the recommendation that was approved did not include the process of sharing intent for the future of the missing item. She asked the council if they want that in the recommendation and suggested that we add the process for the missing item to the recommendation. K. Schulz (WVLS) recommended that Mary's suggestion be discussed at the next Cooperative Circulation Committee meeting.

S. Bedroske (Dorchester) moved to approve the minutes as written, R. Wenzel (Gilman) seconded. Motion carried.

### V-Cat Financial Report:

No discussion. C. Huston (Stetsonville) moved to approve the financial report, K. Metzke (Greenwood) second. Motion carried.

### Teleforms replacement discussion

K. Schulz (WVLS) stated that WVLS is looking to replace Teleforms because it is no longer supported by Innovative. He researched two competitors- i-tiva and Unique. He shared this cost breakdown:

Exhibit 13a

i-tiva for Telephone	\$7,504.00	
i-tiva Install	\$800.00	
Decrease in Maintenance	\$1,032.00	
i-tiva Year One	\$8,304.00	
i-tiva Year Two	\$7,879.20	
Estimated V-Cat Increase on Year Two	\$6,847.20	
Unique Install	\$2,000.00	\$500 per notice
Unique Year One	\$2,500.00	
Unique Year Two	\$500.00	
Unique Variable Costs		
Phone Call (Cost per notice)	\$0.15	
SMS Notice (Cost per notice)	\$0.10	

K. Schulz (WVLS) clarified that the monies in the special project fund could fund either product for 2020. The 2021 budget would see an increase to accommodate this new cost. He estimated a 5% annual increase.

M. Stachowiak (MCPL) asked what the .15/.10 per call that Unique charges might look like based on calls from this year. K. Schulz (WVLS) responded that our current product, Teleforms, doesn't track calls per year. However, during a recent check, he noted 200 calls that day. He pointed out that if Unique tries multiple calls to the same number will it cost .15 per try. He shared that there is a separate reporting tool for Unique, it will not be available to libraries through Sierra.

M. Stachowiak (MCPL) noted that the system had i-tiva in the past and it worked with Horizon. K. Schulz (WVLS) responded that his best guess is that i-tiva and Sierra will also integrate.

A question was asked about other systems in Wisconsin. Are others using i-tiva? K. Schulz (WVLS) answered that IFLS Library System and Milwaukee Federated Library System are currently using i-tiva.

M. Derpinghaus (MCPL) asked why the cost of year two is more expensive than year one. K. Schulz (WVLS) responded that he budgeted a 5% increase for the second year. M. Derpinghaus (MCPL) asked what Teleforms is costing us, K. Schulz (MCPL) responded the maintenance is \$1,032.00 yearly. We also pay for three telephone lines from Charter and WVLS would continue that with the new product. He noted that it may be possible to reduce cost by using voice over IP, which is like Skype. This would allow WVLS to cancel the Charter phone lines, however he has never heard of anyone having success with this.

M. Derpinghaus (MCPL) shared that he did some quick math and Unique could cost \$10,000 or more.

T. Blomberg (Rib Lake) noted that comparing i-tiva and Unique was like comparing apple to oranges because their pricing models are so different.

H. O'Hare (Tomahawk) requested that calls be tracked for some time to get a better idea of an average. She also requested that other library systems be contacted for the impressions of the i-tiva and how it works for them, plus the customer services options.

## Exhibit 13a

C. Huston (Stetsonville) asked if the per call cost for Unique would be divided evenly between libraries or if the libraries would only pay for their calls. K. Schulz (WVLS) responded that the cost would be divided evenly between all libraries. He clarified that he first thought is divide the cost evenly because Unique may not be able to report out the individual library. T. Blomberg (Rib Lake) noted that we would then have to decide between which library gets the cost of the call, the owning library or the patron's home library.

K. Schulz (WVLS) clarified that this discussion is about reviewing product information. A vote may be taken in November. He reminded the Council that if something goes wrong with Teleforms, there will be no support or patch to fix it.

### **Bibliographic / Interface Committee:**

C. Luebbe (MCPL) reported for the Bibliographic/Interface Committee. The committee has not met since the last V-Cat Council meeting. The committee is still collecting ideas for training, she asked the council to please share any ideas with the committee.

C. Luebbe (MCPL) also reminded the council that they can send questions related to cataloging and the OPAC to the committee.

C. Luebbe (MCPL) noted that the Backstage process has been working well doing only quarterly updates.

R. Metzler (WVLS) announced a Z39.50 cataloging training on October 2 at Colby Community Library. Details may be found in her "Z39.50 Cataloging Training Oct 2019" email sent on September 11, 2019. R. Metzler (WVLS) also announced that Ann Mroczenski will be coming back to WVLS to work on Marc Alerts.

K. Schulz (WVLS) announced a problem in the OPAC. In the past this problem was attributed to reindexing, but it has more to do with the scoping. Sometimes when using a material type search, not all item owning locations show up in the OPAC. The material type search is programmed to return bibliographic records only, not items. We can turn on an option to show linked records, this option should fix the problem and show items. K. Schulz (WVLS) stated that he would like to bring this issue to the Bibliographic/Interface committee to brain storm ideas about the consequences of turning on show linked records.

M. Derpinghaus (MCPL) asked is there is a sandbox where this feature could be tested. K. Schulz (WVLS) answered that we do not have a sandbox.

R. Wenzel (Gilman) questioned whether this feature could be turned off if something goes wrong. K. Schulz (WVLS) answered that yes, it can be turned off if it doesn't work correctly or makes something else work poorly.

V. Roberts (Rhineland) suggested picking a week that might have lower traffic on the OPAC, just in case.

D. Kiefer (Merrill) asked if this problem is limited to certain materials types. K. Schulz (WVLS) clarified that it could happen when using any material type search.

C. Huston (Stetsonville) clarified that when searching under a library the item location will show up but if a material type search is used, the item location will not show up. K. Schulz (WVLS) said that is correct.

S. Bedroske (Dorchester) moved for the Bibliographic / Interface Committee to have the charge to turn on "show unscoped records". V. Roberts (Rhineland) seconded.

Motion carried.

### **Cooperative Circulation Committee Report**

M. Stachowiak (MCPL) reported for the Cooperative Circulation Committee.

**Damaged and missing pieces recommendation (see appendix A at the end of this document)**

Exhibit 13a

M. Stachowiak (MCPL) reminded the council that in special circumstances it is a recommended practice to speak one on one with the library involved.

V. Roberts (Rhineland) pointed out that #3 reads oddly:

3. Write down both the Patron# (if not checked in) and the Last Patron# (if checked in).

The parentheses are not clear as to whether the item in question is checked in or not. She recommended that the information in the parentheses be removed, because it is confusing and both pieces of information can be found whether or not the item is checked in.

H. O'Hare (Tomahawk) shared that her staff noticed that most libraries will renew the item, so the patron does not get a fine. K. Schulz (WVLS) clarified that the current language allows for renewal.

C. Huston (Stetsonville) asked if it the library where the item is returned's responsibility to follow through with this recommendation even if the item isn't that library's and is not their patron. K. Schulz (WVLS) and M. Stachowiak (MCPL) reminded the council that communication is key. In a system like ours a third location does happen. This is where you have a conversation with each library.

V. Roberts (Rhineland) shared notes from her staff about the section titled Incoming Item from Patron, #5:

If the patron returns the item in person, admits to causing the damage and wants to pay for it:

- d. Owning library: use create lists for lost and paid status and invoice that library.

The Rhineland staff were concerned that this direction is too passive. It was suggested to add a step in the document that the receiving library call the owning library to inform them about the payment. When a report is run regularly this payment will be found. V. Roberts (Rhineland) suggested adding a line stating when possible please contact the owning library as a courtesy.

K. Metzke (Greenwood) asked for clarification about a status change; specifically when money is collected for an item in a status of lost does the status change to lost and paid? M. Stachowiak (MCPL) affirmed that yes, that's how the software works.

M. Stachowiak (MCPL) clarified that an important step not to be missed is to add the bill. K. Schulz (WVLS) quickly opened Sierra to demonstrate:

- Find the affected item on a patron account
  - Select item
  - Mark item lost
  - Add bills
- (See screen shots below)

Exhibit 13a

Sierra · Wisconsin Valley Library Service · Rachel Metzler

FUNCTION: Check Out (Circulation Desk)

Search: Key or Scan Item or Patron Barcode

Patron Information:

- Name: Test, Tester
- Barcode: 23414002925721
- Expiration Date: 04-30-2020
- Birth Date: 02-29-1956
- Patron Type: WVLS Adult
- Email Address: ils.admin@wvls.org
- Address: 1234 Test Street, Test City, WI 12345

Checked-Out Items:

- Check Out: 0
- Checked-Out Items: 1
- Holds: 0
- Fines: \$30.00
- Check In: 0
- Linked Patrons: 0
- ILL: 0

All	#	Barcode	Call Num	Location	Title	Due Date	Status
<input checked="" type="checkbox"/>	1	1234567890	VG PS3 GRAN	a1ytx	Grand theft auto IV [electronic resource].	07-10-2019	Billed

Mark Lost Items

Total bill: \$30.00

No.	Barcode	Call Num	Title	Item ...	Process	Billing..	Amount
1	1234567890	VG PS3 GRA...	Grand theft auto IV [electronic reso...	\$25.00	\$0.00	\$5.00	\$30.00

Buttons: Add Bills, Update Bill, View Item, Cancel

M. Pregler (Antigo) has made a procedure for Antigo staff. WVLS will distribute to the council.

C. Luebke (MCPL) shared that sometimes people will admit to damaging an item but do not have it with them. M. Stachowiak (MCPL) noted that even in this case, the mark damaged item option found in the patron account is less than ideal because it changes the status of the item to damage but does not check the item in. Sometimes this causes a double charge. The instructions specifically say "mark as lost" for this reason.

V. Roberts (Rhineland) noted that for the portion of the document dealing with incoming damaged items from the courier it would be best to add the general courier email for ease of use. She also asked for clarity on the following point found under Incoming Item from the Courier, If the item appears to be damaged, but NOT by the courier:

1. If the item is yours, check for a V-Cat Damage/Missing Form, check the inside back cover, or the item record for a noted damage message.
  - a. If no message and you feel the damage was caused by a patron, call the last check in location and/or check out location to provide any feedback on the damage. If you've determined the patron damaged the item:

She asked why someone would call multiple libraries? M. Stachowiak (MCPL) answered that it covers the possibility of check out and return location being different.

V. Roberts (Rhineland) also suggested clarity for this point found under Incoming Item from the courier, if a piece is missing when it arrives in the courier:

- e. If it can't be located:
  - i. The owning library will send an invoice to the checkout location. If there are other pieces to the item, send remaining pieces with the invoice. The owning library will receive their money within 60 days.

How should the pieces/invoice be sent? M. Stachowiak (MCPL) noted that it depends on whether you have pieces or not. If you have pieces, send the invoice and pieces in the courier. If no pieces, send the invoice via email.

J. Jochimsen (Abbotsford) asked if the term "check out location" is correct in the above statement. M. Stachowiak (MCPL) answered that yes, the check out location is "on the hook" for the item once it has been checked out to a patron.

M. Pregler (Antigo) requested more specific marking in books as to what the damage is. M. Stachowiak (MCPL) reminded the council that this process starts with looking for noted damage in the back cover of the book.

H. O'Hare (Tomahawk) said that many staff used messages in Sierra to communicate damage. She has been re-training Tomahawk staff to look in back of the book and to look for notes/messages in the item record.

S. Bedroske (Dorchester) asked how to we communicate damage in non-book items? V. Roberts (Rhineland) noted that there will still be miscommunication about damage no matter the item type.

K. Heiting (Granton) reminded the council to only write in your items.

M. Stachowiak (MCPL) suggested the possibility of a recommendation to only write in the items, and not create messages/notes in Sierra.

S. Bedroske (Dorchester) reminded the council that the reason for writing on items and not using a Sierra note/message is because the check in process slows down when messages are in the item record. P. O'Connell (Minocqua) shared that Minocqua usually uses the internal note.

M. Stachowiak (MCPL) said that if the damage note is only digital then it takes time to look at the item record to find it.

She shared that pictures of damage could be used instead of sending the item, which takes time and that calls can also be made. Furthermore, if a courier bin comes to your library with damage (i.e. water damage) the receiving library does not bill the courier for any item that is not their own. Instead, send pictures of the damaged items to the owning library.

R. Wenzel (Gilman) asked when pink and green slips should be used. M. Stachowiak (MCPL) answered in the past there were two forms. The green form was for noted damage; the owning library or receiving library could use before sending in

## Exhibit 13a

the courier or checking out to a patron. This form could also be used if a patron noticed the damage. The pink form was to communicate billable damage. This form attached to the item and sent back to owning library. It is used when asking, "are you going to bill us, then we bill our patron?"

M. Stachowiak (MCPL) shared that going forward there will be one form that will have everything on it. The user will circle the situation that works best. K. Roesler (MCPL) shared the current edit of the form with the council.

K. Roesler (MCPL) reminded the council that they can contact their county representative on the Cooperative Circulation Committee to share feedback.

S. Bedroske (Dorchester) asked if tape can be used when attaching the form to an item. K. Roesler (MCPL) answered, yes, removeable tape.

### **V-Cat Billing Guidelines (appendix b)**

M. Stachowiak (MCPL) presented the revised V-Cat Billing Guidelines.

J. Jochimsen (Abbotsford) asked if libraries ever refund their patrons and what to do in that situation. M. Stachowiak (MCPL) suggested a call to the libraries involved for a solution.

R. Wenzel (Gilman) asked if the library can bill for lost and paid items? M. Stachowiak (MCPL) clarified that yes, that's the current practice and reminded the council that documentation on the procedure is on the training website.

The V-Cat Billing Guidelines will be included in the November V-Cat Council meeting for approval.

### **The council took a short break**

Meeting called back to order at 11:19

K. Schulz (WVLS) presented the new magazine recommendation:

#### V-CAT RECOMMENDATION FOR MAGAZINE CIRCULATION

- Circulate magazine according to local loan rules, but are now holdable by everyone
- Current issue will not circulate
- Send in courier in envelope; NO tape on magazine (transit slips)
- Review discussion in 1 year

#### VARIABLES WITHIN V-CAT FOR MAGAZINE CIRCULATION

- Loan period
- Renewals
- Renewal loan time
- Fines
- Grace period

Tip:

As new issue is entered, take past issue off high demand

M. Pregler (Antigo) asked about the issues that will not be circulating will the be coded a certain way? K. Schulz (WVLS) answered that high demand will be used. K. Schulz (WVLS) also clarified that it is up to each library if they will circulate the most current issue to its own patrons or have the newest issue be in library use only.

Exhibit 13a

M. Stachowiak (MCPL) asked for clarification for the phrase in the recommendation "local loan rules". R. Metzler (WVLS) answered that this means the checkout library loan rules.

H. O'Hare (Tomahawk) asked if the loan rules could be shared. K. Schulz (WVLS) answered that all libraries are either doing a 7 day checkout or a 14 day checkout.

K. Metzke (Greenwood) asked what status to use in Sierra for high demand. K. Schulz (WVLS) responded that WVLS will make sure that all magazines will work how the libraries desire. M. Stachowiak (MCPL) clarified that WVLS will be working to make sure there's a loan rule to suit each library. K. Schulz (WVLS) will ask each library what needs to happen. C. Huston (Stetsonville) asked if all libraries' loan rules for magazines could be shared with the group, particularly related to what other libraries charge for fines. K. Schulz (WVLS) answered that information can be shared if needed.

H. O'Hare (Tomahawk) suggested a recommendation for noting damage to a magazine and suggested that magazines be added to the noted damage document from the Cooperative Circulation Committee. J. Jochimsen (Abbotsford) and T. Blomberg (Rib Lake) suggested a white label to note the damage.

K. Roesler (MCPL) asked if we are anticipating a lot of circulation. V. Roberts (Rhineland) noted that she experienced a lot of circulation of magazines throughout the IFLS Library System, with not much damage noticed in those years.

H. O'Hare (Tomahawk) has recently seen an increase in circulation for magazines and hasn't seen much damage.

K. Schulz (WVLS) suggested adding the topic "noting damage for magazines" to the Cooperative Circulation Committee's recommendation.

T. Blomberg (Rib Lake) said that her default price is \$3 for each magazine, which is more than her subscription price. She also commented that we may be over thinking this. M. Stachowiak (MCPL) followed up by saying that these items are temporary and cheap. P. O'Connell (Minocqua) reminded the council that some magazines are worth more, so they have a higher price in the item record. H. O'Hare (Tomahawk) noted that she has some magazines that are expensive. S. Bedroske (Dorchester) noted that each library can establish an item price they are comfortable with.

V. Calmes (Colby) requested clarification on local loan rules, if a magazine goes somewhere where the checkout period for magazines is 14 day, is that how it will checkout? K. Schulz (WVLS) affirmed that yes, magazine checkout will work just like books and other items sent.

K. Roesler (MCPL) reminded the council that of the 20 libraries that gave data for the Cooperative Circulation Committee's loan rule document, 10 libraries have 7-day loans, and 10 have 14-day loans.

H. O'Hare (Tomahawk) asked for flexibility for the part of the recommendation that says current issues will not circulate. Could the 2 most recent issues stay on high demand? S. Bedroske (Dorchester) noted that she interpreted this statement to mean that up to one month's worth of issues will not circulate. K. Schulz (WVLS) clarified that each library still has the right to follow the recommendation or not.

K. Metzke (Greenwood) asked if WVLS has interdepartmental envelopes to share. R. Metzler (WVLS) answered that there might be some, but remember that envelopes need to be shared amongst each other. All libraries may need to use their own to help make this happen.

V. Roberts (Rhineland) moved to accept the magazine circulation recommendation as written, K. Roesler (MCPL) seconded. No further discussion. A roll call vote was taken.

Roll call vote:

## Exhibit 13a

Yea: 15, Nay: 5, Abstain: 2

Motion carried.

H. O'Hare (Tomahawk) asked for an effective date. K. Schulz (WVLS) noted that he will send out an email with more information.

### Other Sierra Topics:

K. Schulz (WVLS) presented on **checkout receipt price** and shared examples. If a library would like an updated receipt, please email [ils@wvls.org](mailto:ils@wvls.org). H. O'Hare (Tomahawk) requested pictures of system examples. K. Schulz (WVLS) indicated that he will send an email with ideas.

V. Roberts (Rhineland) noted that she is pursuing board support for this feature.

K. Schulz (WVLS) noted that this update may not work for everyone and that newer receipt printers work better than older ones. K. Schulz (WVLS) also shared that Antigo added their logo, so that might be possible as well.

C. Huston (Stetsonville) asked if it is possible to change things on receipts themselves. K. Schulz (WVLS) said you can with training. However, libraries are encouraged to contact him if they want changes made to their receipts. He also reminded the council that if prices are not in the item record, the total will be \$0.

C. Huston (Stetsonville) asked if it is a library by library decision. K. Schulz (WVLS) responded that yes, each library has the choice to do this or not. You could be using the default receipt or WVLS could make changes to the receipt within reason and capability. She further asked if this change can be done based on patron type. K. Schulz (WVLS) responded that no, this would be all receipts at your library or none.

### Sierra Snack: View Outstanding Holds

- Using the Function dropdown select View Outstanding Holds
- Select your pickup location
- Holds placed before: edit date
- Click view outstanding holds

It is a good idea to follow up on any unfilled holds that are older than 6 months.

M. Stachowiak (MCPL) asked what the select location column does. K. Schulz (WVLS) shared that this column has information when it's an item level hold.

M. Stachowiak (MCPL) questioned why some of the "not needed after" dates are so far in the future. K. Schulz (WVLS) responded that patrons can change that date.

C. Huston (Stetsonville) wondered if this can show owned items that are not filling holds. S. Bedroske (Dorchester) noted that would only work for item level holds. R. Metzler (WVLS) shared that this is best used to see if there are any patron holds not being filled, not for owned items filling holds.

### Other Sierra Topics

J. Jochimsen (Abbotsford) asked about offline circulation. K. Schulz (WVLS) reminded the council that Offline Circulation has to be proactive, and you have to have the internet to download. Offline Circulation must be installed before outages. If it is not installed, now is a great time to do this. If you have questions, contact WVLS.

Exhibit 13a

J. Jochimsen (Abbotsford) asked if there is a way to use a patron name in offline circulation instead of a barcode? K. Schulz (WVLS) answered that no, you have to have the barcode because offline circulation cannot connect to the database.

K. Schulz (WVLS) will send information to the listserve for help with downloading offline circulation.

**Request for November 2019 Agenda:**

Interest was shared by the council for a group order of new barcode scanners. J. Klingbeil (WVLS) can help facilitate this. It will not need to be an agenda item at a future meeting.

**Adjournment:**

S. Bedroske (Dorechester) moved to adjourned the meeting at 11:56 am, K. Roesler seconded. Motion carried.

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SUBMITTED: 9/20/2019 R. METZLER, RECORDER

## Appendix A

### *Damaged and Missing Pieces*

It is the responsibility of the circulation staff in every library to check incoming items for anything that might be missing or damaged **BEFORE** being checked in. Pay particular attention to AV items that may have missing pieces. It is also good practice to inspect AV items when checking them out. If all staff do this, patrons cannot say something was missing when they checked it out. If there is anything wrong with an item, **DO NOT CHECK IT IN.**

For the purpose of this document, there are different library or location terms used:

- Charge location: library where the item is returned and/or the library to add the manual fee. Charge location is the library that receives the money from Ecommerce.
- Check in library: library that checked in the item whether it's the last check in location or another library listed in the item's circulation history.
- Check out library: designated in the item record.
- Owning library: designated in the item record.
- Patron home library: designated in the item record.
- Receiving library: where the item was sent in transit to.

The following guidelines about damaged or missing pieces is divided into two scenarios: those items incoming from a patron, and those arriving in the courier. Within each of these scenarios, there are several descriptive instances with procedures for handling them.

#### **Incoming item from a patron (returned at the desk or in a book return)**

##### **If a piece is missing (a CD or cassette from an audiobook, a CD or DVD from its case, a booklet, etc.):**

1. Do not check it in.
2. Search the ILS using the item barcode.
4. Write down both the Patron# (if not checked in) and the Last Patron# (if checked in).
5. Contact the most recent patron and ask them to look for the missing piece. This is the responsibility of the library where the item was returned. Inform the patron that the item will stay checked out on their record until the missing piece is returned. Item may be renewed if within the library's policy. When the piece is returned, the item can be checked in and routed accordingly.
6. If the patron cannot find the missing piece or fails to return it within a reasonable amount of time, fill out a V-Cat Damage/Missing Form, place inside the item with the "To" field visible, and send it back to the owning library still without checking it in. Place a message on the item record: "Returned to (owning library name) with missing piece noted" with date, library, and staff initials ex: (1-1-2018 Antigo AB).
6. The owning library then decides if the piece can be replaced. If yes, notify the checkout library to add the manual charge with an explanation and then check in the item.
  - a. Invoice the checkout library at the same time, or watch the Fines Paid function in Sierra and invoice the library that took payment. The owning library will receive their money within 60 days.
7. If replacement of the entire item is necessary, from the patron record click the "Mark Lost Items" button (item is still checked out to patron), then "Add Bills" button, which will create a bill. Owning library:
  - a. Invoice the checkout library at the same time or use create lists if the item is in the billed status or lost and paid status. Invoice accordingly. The owning library will receive their money within 60 days. The checkout library will receive their payment from the patron through Ecommerce, cash, or check.

**Incoming Item from a Patron (returned at the desk or in a book return) (Cont'd)**

**If the damage is normal wear and tear:**

1. Look to see if damage is already noted. It may be noted inside the back cover of the book or in the item record within the ILS. The preferred location is inside the back cover. If it hasn't been noted, continue on.
2. Search the ILS using the item barcode.
3. If there are no holds on the item:
  - a. Fill out a V-Cat Damage/Missing Form, place inside the item with the "To" field visible, and return it to the owning library by checking it in.
4. If there are holds on the item:
  - a. Check it in with the "no holds filled" option. See instructions for the no holds filled option.
  - b. Fill out a V-Cat Damage/Missing Form, place inside the item with the "To" field visible, and return it to the owning library by checking it in.
5. Do not check it out to anyone. The owning library needs to evaluate it at the point where the damage is noted.
6. When the owning library receives it, they need to decide whether to repair the damage, note the damage on the item itself and return it to circulation, or withdraw the item.
  - a. If the item is being withdrawn and there was a hold and it's the only copy, the owning library needs to contact the patron's home library to alert the patron.

**Incoming Item from a Patron (returned at the desk or in a book return) (Cont'd)**

**If the damage is from possible misuse by the patron (ripped front, scribbling, disc cracked, chewed by dog, etc.)**

1. Check the item in using the "no holds filled" option. Change the status to damaged.
2. Notify the patron and place a message in the patron's record that the item was returned damaged and that the owning library may charge either the full replacement cost or a fee for the damage.
3. Fill out a V-Cat Damage/Missing Form, place inside the item with the "To" field visible and put it in the courier.
4. When the owning library receives the item, determine whether to charge for the damage.
  - a. If yes, send an invoice and the item to the checkout library.
  - b. The checkout library will add the manual charge to the patron's record. The checkout library will receive their payment from the patron through Ecommerce, cash, or check.
  - c. The owning library will receive their money within 60 days.
  - d. If no, either withdraw the item or circulate it but add a damage message to the inside back cover of the book. Email the patron's library to let their patron know there'll be no charge. Patron's library will update message in patron record.
5. If the patron returns the item in person, admits to causing the damage and wants to pay for it:
  - a. Mark the item as lost
  - b. Add the bill
  - c. Collect the money (patron may keep the item)
  - d. Owning library: use create lists for lost and paid status and invoice that library.

**Incoming Item from the Courier****If it appears the item was damaged by the courier**

(Note: the damage will have to be severe to prove the courier was responsible; libraries are responsible for packaging w/care)

1. The receiving library will take pictures of what the damage is: water, snow, dirt, in the bin or on the item(s) as well as take pictures of the damage to the individual items. Send the pictures to the WVLS courier staff person and the courier vendor contact.
2. Determine if you will invoice the courier vendor, circulate as is, or withdraw. If you circulate as is, skip step 3.
3. If the item(s) are yours, you must first deal with the possibility that there is a hold. Search the ILS by the barcode for holds.
  - a. If no holds, check the item in from transit status. Change status accordingly.
  - b. If holds, the status is in transit hold. You must transfer the hold to another copy. Follow the instructions under Transfer Holds Procedure. If you have the only copy, add a message to the patron's record stating there are no other copies available.
4. Continued actions:
  - a. Invoice courier vendor:
    - i. Change status to one of your choosing.
    - ii. Add internal note or message "Item sent to courier vendor for payment. Date/initials.
    - iii. Fill out courier vendor's damage claim form.
    - iv. Send form and item to courier vendor's contact through your courier pick-up.
  - b. Circulate as is, indicate damage inside the back cover.
  - c. Withdraw: follow your library's steps.
5. If the item(s) aren't yours
  - a. Notify the owning library of the damage to their item(s). Attach the pictures to your email and let them know that you will be returning their item(s) to them to follow up with the courier vendor.
  - b. This item was sent to your library to fill a patron's request.
    - i. Transfer the hold to another copy on the bib record. Follow the instructions under Transfer Holds Procedure.
    - ii. If it's the only copy, add a message to the patron's record noting that there's damage and a possibility that they won't be getting this item. At this point, there are many possibilities for the item and the patron: item could continue to circulate, another bib has copies, or request through ILL.
      1. The owning library will need to let you know if you need to cancel the patron's request.

**Incoming Item from the Courier (cont.)****If the item appears to be damaged, but NOT by the courier:**

2. If the item is yours, check for a V-Cat Damage/Missing Form, check the inside back cover, or the item record for a noted damage message.
  - b. If no message and you feel the damage was caused by a patron, call the last check in location and/or check out location to provide any feedback on the damage. If you've determined the patron damaged the item:
    - i. The owning library will send the invoice and the damaged item back to the checkout library for the patron. The owning library will receive their money within 60 days.

- ii. The checkout library will add the manual charge to the patron's record. The checkout library will receive their payment from the patron through Ecommerce, cash, or check.
  - c. If the owning library is continuing to circulate the item, add a damage message to the inside back cover of the book, or withdraw the item.
- 2. If the item **isn't** yours, check the inside back cover or the item record for a noted damage message. If there isn't a message:
  - a. Normal wear and tear: attach a V-Cat Damage/Missing Form to the front with removable tape. Fill in the appropriate information and check in to fill the hold.
  - b. Damaged:
    - i. You must transfer the hold to another copy on the bib record. Follow the instructions under Transfer Holds Procedure.
    - ii. If it's the only copy, add a message to the patron's record noting that there's damage and a possibility that they won't be getting this item. At this point, there are many possibilities for the item and the patron: item could continue to circulate, another bib has copies, or request through ILL.
    - iii. Fill out a V-Cat Damage/Missing Form place inside the item with the "To" field visible and put it in the courier bin.
- 3. When the owning library receives it, they need to decide whether to repair the damage, note the damage on the inside of the back cover and return it to circulation, or withdraw the item.
  - a. If it was the only copy, the owning library will need to let the patron's library know if they need to cancel the patron's request.

**Incoming Item from the Courier**

**If a piece is missing when it arrives in the courier:**

1. Check the courier bins/bags carefully to see if it can be found.
2. If it's not found and the item is from another library for one of your patrons:
  - a. Do NOT check it in
  - b. Search the ILS using the item barcode.
  - c. Note the transit message (where the item was last checked in), and note the last patron number.
  - d. Send the item back to the library in the transit message with a V-Cat Damage/Missing Form, place inside the item with the "To" field visible and identify the missing piece.
  - e. Add a message to the ILS item record stating "Sent back to (Library) to retrieve missing piece." with date, library, and staff initials ex: (1-1- 2018 Antigo AB).
3. If the item with the missing piece belongs to your library:
  - f. Check in and change status to Parts Missing
  - g. Contact the last patron in the Patron# field and ask them to look for the missing piece.
  - h. Report the missing piece to the last check in location in case the piece is returned, and if not returned an invoice may be sent to the library.
  - i. When the piece is returned to the owning library, the item can be checked in.
  - j. If it can't be located:
    - ii. The owning library will send an invoice to the checkout location. If there are other pieces to the item, send remaining pieces with the invoice. The owning library will receive their money within 60 days.

Exhibit 13a

- iii. The checkout library will add the manual charge to the patron's record. The checkout library will receive their money from the patron through Ecommerce, cash, or check.

Appendix B

V-Cat Billing Guidelines

- Libraries agree that they will only create invoices for one another if the total of the invoice is at least \$5.00.
- If a library wishes to discount the replacement cost of an item due to its condition or age, this should be noted on the invoice.
- ~~Certain packaging (DVD cases, hard plastic jewel cases, etc.) may not withstand significant use without breaking. Libraries will not charge one another for breakage of such cases.~~
- Certain condition issues will not be charged to other libraries: packaging (DVD cases, hard plastic jewel cases, etc.), broken bindings, loose pages, age/usage related, etc.
- Manual fees for a missing piece or damaged item should be added to the patron's record by the checkout library. This is the library that will receive payment if the patron pays through Ecommerce.
- Libraries are encouraged to run certain reports on a timely basis. These reports will catch billed or lost and paid items for you to invoice other libraries.
- Invoices for lost and paid items and damaged items should not include items with billed, missing, parts missing, and transit statuses as these items may be returned before payment is made.
- Damaged items, when paid by the patron, become theirs to keep. Owning libraries should return the item to the checkout location with their invoice.
- Libraries agree to can amend invoices if items from a multi-item invoice are returned or resolved.
- Invoices for libraries with multiple locations should be sent to their headquarters library.
- To encourage libraries to keep current with invoicing one another, all such invoices must should be issued within 60 days of the above dates listed below in the item record (but not less than 30). A library receiving an invoice for an item which is more than 60 days after the dates listed below may decline to pay the invoice without penalty.
- ~~Libraries agree that~~ Invoices received from another library will be paid within 60 days of the date of the invoice.

Status	Date used	When to Invoice
Billed	Overdue Date	Not less than 30 days after overdue date*, No more than 60 days
Damaged	Last Check-in date	Communicate w/library**, No more than 60 days
Lost and Paid	Paid Date	Any time after paid date, No more than 60 days
Missing	Last Updated date	Not less than 30 days*, No more than 60 days
Parts Missing	Last Updated date	Not less than 30 days*, No more than 60 days
Transit items	Last Updated date	Not less than 30 days*, No more than 60 days

\*This will give the invoiced library time to follow up with their patron or locate the item within their library.

\*\*The libraries involved may have communicated to send an invoice right away whether the patron paid, has been charged, or not charged for the item.