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POLICY

To facilitate successful borrowing of materials and communication with patrons and to provide careful stewardship of library materials within Washington County Cooperative Library Services (WCCLS), member libraries will employ consistent, service-oriented procedures that encourage responsible library use and ensure equitable access to library resources.

REGULATIONS

Staff at member libraries will follow the WCCLS Circulation Procedures.

Staff at member libraries will make exceptions to WCCLS Circulation Procedures only with permission from library supervisors.

WCCLS will support member library staff by maintaining current, up-to-date policy and procedures documents and by providing training resources on Integrated Library System (ILS) circulation functions. This includes:

- Registration
- Circulation of materials
- Hold requests
- Fees and bankruptcy

WCCLS will provide relevant information for member libraries on networked resources that touch the integrated library system, particularly when those resources touch patron records.

Eligibility and Responsibility for Library Cards

For Residents

Staff at member libraries will issue WCCLS cards free of charge to residents. "Resident" is defined as all individuals residing or owning real estate within Washington County, Oregon.

People who qualify for reciprocal borrowing under the MIX (Metropolitan Interagency Exchange) agreement are also treated as residents. For clarity, this includes people who reside in:

- Multnomah County, OR
- Clackamas County, OR (excluding Johnson City)
- Hood River County, OR
- Clark County, WA
- Skamania County, WA
- Klickitat County, WA
- Cities of Ariel, Cougar or Woodland, WA (in Cowlitz County)

Residents shall also include individuals who have recently moved to Washington County or to jurisdictions covered in the reciprocal borrowing agreement.

For Part-Time Residents

Part-time residents are individuals who live in Washington County on a seasonal or temporary basis, but who do not otherwise meet residency requirements (i.e., their permanent residence is outside the county, and they do not own property in the county). This definition may include:

- Individuals living with family or friends seasonally
- Individuals on extended work/internship assignments
- Individuals receiving in-patient or residency services in the county
- Students or others living temporarily in the county for education/training

Part-time residents may be eligible for a Local Courtesy or Passport card type, based on the documentation they are able to provide.

For Non-Residents

Staff at member libraries will issue WCCLS cards to **non-residents** based on the eligibility and requirements in the Patron Types chart below. Non-residents must apply for and renew library cards in person.

“Non-resident” for the non-resident paid card type is defined as residents of adjacent counties not covered by reciprocal agreements. Adjacent counties are Columbia, Clatsop, Tillamook, and Yamhill counties.

Cardholders are responsible for all materials borrowed on their cards and for all monies owed.

Patron Types

Issued by All Libraries and Honored by All Libraries

Patron Type	Eligibility & Requirements	Registration Term	Check out Limit	Hold Limit	Inter-Library Loans	Fees & Bills	Digital Library	Adventure Pass	Notes & Material Types
GENERAL (default)	Resident Photo ID Proof of address (if non-resident property owner, also show current Washington County property tax statement)	4 years	100	50	5	Yes	Yes	Yes, if not expired, DOB of 18+, and account fees under \$50.00	
NON-RESIDENT PAID	Non-resident who pays annual fee. Photo ID Proof of address	1 year from date fee is paid	100	50	5	Yes	Yes	Yes, if not expired, DOB of 18+, and account fees under \$50.00	See WCCLS website for current fee. Must reside in adjacent counties: Columbia, Clatsop, Tillamook, and Yamhill counties
PASSPORT PROGRAM	Oregon resident Photo ID Proof of address Library card from participating library	2 years	10	10	0	Yes	Yes	Yes, if not expired, DOB of 18+, and account fees under \$50.00	https://www.olaweb.org/passport-directory

Patron Type	Eligibility & Requirements	Registration Term	Check out Limit	Hold Limit	Inter-Library Loans	Fees & Bills	Digital Library	Adventure Pass	Notes & Material Types
E-ACCESS	Resident	4 years	0	0	0	N/A	Yes	Yes, if not expired and DOB of 18+	Online registration form only works for Washington County addresses. Allows use of digital resources only, including Internet, wireless. No physical materials may be checked out or placed on hold.
STUDENT	For patrons up to 21 years of age. Lives or attends school in Washington County. Must provide at least last name, first name, address, and phone number.	1 year	5	5	0	Yes	Yes	No if DOB not 18+	Student accounts handled via data load procedures will be auto-renewed as long as the student is still eligible. Patrons 18+ with this card type will be able to reserve Adventure Passes. Only WCCLS staff are permitted to create student cards with the data load process.
LIMITED BORROWING	Resident Photo ID Proof of address	2 years	5	5	0	Yes	Yes	Yes, if not expired and DOB of 18+	Used when limited borrowing privileges are requested by patrons or need to be implemented by staff (e.g., bankruptcy).
STAFF – PROFESSIONAL USE	Staff currently employed at WCCLS or member library.	4 years	100	50	5	Yes	Yes	N/A	For professional use only.
BIBLIOCOMMONS STAFF	Staff currently employed at WCCLS or member library.	4 years	0	0	0	0	0	0	For professional use only. Card is used to create approved BiblioCore staff account.

Local Library Option to Issue and Honored by All Libraries

Patron Type	Eligibility & Requirements	Registration Term	Check out Limit	Hold Limit	Inter-Library Loans	Fees & Bills	Digital Library	Adventure Pass	Notes
LOCAL COURTESY	Non-resident who works in, attends school in, or is visiting Washington County for at least 3 months. Photo ID, proof of address Proof of school attending or place of employment For visitors, proof of local and permanent address is needed.	1 year	10	0	0	Yes	Yes	Yes, if not expired and DOB of 18+	
TEMPORARY -- NO PERMANENT ADDRESS	Resident without a street address or living in temporary accommodations. Photo ID or acceptable equivalent	3 months	5	0	0	Yes	Yes	Yes, if not expired and DOB of 18+	Requirement to provide printed verification of street address of residence is waived for this card type.

Special Use Patron Types: For WCCLS staff use only

Patron Type	Eligibility & Requirements	Registration Term	Check out Limit	Hold Limit	Inter-Library Loans	Fees & Bills	Digital Library	Adventure Pass	Notes & Material Types
HOMEBOUND INSTITUTION SERVICE	Only issued by WCCLS Library Mail Service staff	2 years	100	50	0	Yes	N/A	N/A	Expired registrations should be updated by WCCLS Library Mail Service staff.
HOMEBOUND MAIL SERVICE	Only issued by WCCLS Library Mail Service staff	2 years	100	50	0	Yes	Yes	Yes, if not expired and DOB of 18+	Expired registrations should be updated by WCCLS Library Mail Service staff. Default checkout period is 30 days for all material types.
NON-WCCLS LIBRARY	Only issued by WCCLS Interlibrary Loan staff	2 years	100	50		Yes	N/A	N/A	Expired registrations should be updated by WCCLS ILL staff. Registered At location is External Loans (Staff Use Only)
TEST - FULL LOAD	Used by WCCLS and member library staff for database testing only	2 years	100	50	5	Yes	N/A	N/A	For professional use only

Registration Accuracy and Updates

Staff at member libraries will maintain up-to-date patron data as prescribed in the *Patron section* of the **Data Quality Procedures**.

When patron records expire, cardholders are required to verify accuracy of registration information. Expired cards are blocked from use until registration information is updated.

Cards that have been inactive for 4 or more years and have an account balance that does not exceed \$300 are purged from the database once a year as scheduled by WCCLS.

Account Access, Circulation, and Patron Confidentiality

Staff at member libraries will require a library card or photo ID to provide access to a cardholder's account and registration record, including checkout. Card numbers in a digital format (e.g., viewed in Libby app, photo of library card with card number legible, etc.) will be accepted.

Staff at member libraries will allow account verification in lieu of the library card or photo ID, with levels of access for in-person, phone, or email transactions. In-person verification provides the most access options. See Circulation Procedures for details.

Definition of account verification

- For cards without an address on the account, verification means patron name plus at least one point of contact (varies based on what patron provided to set up account – see Patron Types table).
- For all other card types, verification means a combination of card number and/or patron name, plus providing at least two pieces of information that match the account

Staff at member libraries will require photo ID to change the name on an account and a parent/guardian's photo ID to change parent/guardian of record information. Preferred names can be changed without photo ID.

Staff at member libraries will require proof of address to change the address in a registration record.

Staff at member libraries can establish card associations between two or more patron records. Associations between an unlimited number of cards can be made. Either party can dissolve an association.

Staff at member libraries will check out circulating materials to any cardholder with an account in good standing. An account in good standing:

- Has up-to-date registration information
- Has account balance that does not exceed \$29.99
- Has numbers of materials that do not exceed item circulation limits for their patron type as noted in the **Material Type Settings Table** below

Staff at member libraries will check out Interlibrary Loans (ILLs) according to ILL guidelines.

Staff and volunteers at member libraries will follow the same rules and procedures as patrons when using library resources for personal use. See **Use of Personal Library Cards and Materials by Library Employees & Volunteers Policy**.

Most items will automatically renew a maximum of 4 times, three days before the due date, with the following exceptions:

- Items with holds if there are no other copies available to fill the hold
- Items that have exceeded the renewal limit
- Lost materials
- ILLs (Interlibrary Loans)
- Other materials designated as non-renewable

Staff at member libraries will use blocks in the patron and item records sparingly and only when intending to block checkout.

Staff at member libraries will check in items from all member libraries with the following exceptions:

- Damaged materials
- Incomplete materials
- Items marked as return to lending library only

Staff at member libraries will check materials for damage or missing parts, either at check in or after the item has been checked in via automated materials handling.

Staff at member libraries will make every effort to return materials to circulation in a timely manner.

Staff at member libraries may change items owned by any library as Claim Returned or Claim Never Had. See *Responding to Possible Claims* in **Circulation Procedures**.

Staff at member libraries will declare items lost or damaged, regardless of ownership, when a patron states the item is lost or damaged and is ready to pay for it.

Staff at member libraries will set self-check options to reflect current circulation policy and regulations as much as possible. A library card (or card number) and PIN (password) are required for patrons to use a self-check machine. The same checkout limits, material type limits, and fee limits will apply to self-check machines.

Staff at member libraries will use offline mode for checkout when the ILS is unavailable. Staff at member libraries will not use offline mode for check-in. See Offline Instructions.

WCCLS will make accurate and current .mdb files for offline circulation available to member libraries daily.

Material Type Settings Table

Staff at member libraries will use the material types, limits, and item record settings established in the Material Type Settings Table to ensure accuracy and consistency when cataloging and circulating materials.

Note: **Patron Type Exceptions** are patron types which have a lower maximum item checkout and hold limits than the stated material type limits

MATERIAL TYPE	EXAMPLES	CHECKOUT LIMIT	HOLD LIMIT	STANDARD LOAN PERIOD	PATRON TYPE EXCEPTIONS Checkout limit/Hold limit
Admission Passes	Oregon State Parks parking passes	1	1	7 days	E-Access – 0/0 Student – 0/0
Audiobooks	Books on CD Playaways MP3-CDs Non-musical sound recordings	100	50	21 days Local option of 7 or 14 days for Best Sellers	Passport – 10/10 E-Access – 0/0 Limited Borrower – 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 5/5
Blu-ray	Blu-rays + DVDs Binge boxes	50	50	21 days Local option of 7 or 14 days for Best Sellers	Passport – 10/10 E-Access – 0/0 Limited Borrower – 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 0/0
Books <i>Hardcovers of all sizes; paperbacks are separate Material Type</i>	Board Books Large Print	100	50	21 days Local option of 7 or 14 days for Best Sellers Local option to allow circulation of Reference materials	Passport – 10/10 E-Access – 0/0 Limited Borrower – 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 5/5

MATERIAL TYPE	EXAMPLES	CHECKOUT LIMIT	HOLD LIMIT	STANDARD LOAN PERIOD	PATRON TYPE EXCEPTIONS Checkout limit/Hold limit
Compact Discs	Music on CD Non-musical sound recordings	100	50	21 days Local option of 7 or 14 days for Best Sellers	Passport – 10/10 E-Access – 0/0 Limited Borrower – 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 0/0
Downloadable Audiobooks <i>WCCLS use only</i>		15	15	21 days	Checkout and hold limits for digital content is in addition to limits for physical materials
DVD	Binge boxes Television series	50	50	21 days Local option of 7 or 14 days for Best Sellers	Passport – 10/10 E-Access – 0/0 Limited Borrower = 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 0/0
Electronic Books <i>WCCLS use only</i>		15	15	21 days	Checkout and hold limits for digital content is in addition to limits for physical materials
Electronic Game <i>Not including Board games which are Realia</i>	Video games	5	5	21 days Local option of 14 or 21 days	E-Access – 0/0 Local Courtesy – 5/0 Temp No Permanent – 5/0 Student – 0/0

MATERIAL TYPE	EXAMPLES	CHECKOUT LIMIT	HOLD LIMIT	STANDARD LOAN PERIOD	PATRON TYPE EXCEPTIONS Checkout limit/Hold limit
Electronic Resources		0	0	0	
Equipment	Preloaded tablets Launchpads Laptops or Chromebooks with no hotspot AV Equipment Library of Things Tools Kindles Nooks	5	5	Varies	E-Access – 0/0 Temp No Permanent – 5/0 Local Courtesy – 5/0 Student – 0/0
Hotspot	Hotspots Chromebooks with hotspots	1	1	21 days	E-Access – 0/0 Student – 0/0
Interlibrary Loans		5 total Includes checked-out items and items in process	N/A	Varies, loan period is set by lender	Passport – 0/0 E-Access – 0/0 Limited Borrower – 0/0 Local Courtesy – 0/0 Temp No Permanent – 0/0 Student – 0/0
Microforms		0	0	0	

MATERIAL TYPE	EXAMPLES	CHECKOUT LIMIT	HOLD LIMIT	STANDARD LOAN PERIOD	PATRON TYPE EXCEPTIONS Checkout limit/Hold limit
Multimedia Kits	Readalongs Discovery kits Playaways + books Book club kits	100	50	21 days Book club kits 42 days	Passport – 10/10 E-Access – 0/0 Limited Borrower – 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 5/5
Pamphlets	Foldable maps	100	50	21 days	Passport – 10/10 E-Access – 0/0 Limited Borrower – 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 0/0
Paperbacks <i>Paperbacks of all sizes</i>	Big Books Large Print Musical scores	100	50	21 days Local option of 7 or 14 days for Best Sellers	Passport – 10/10 E-Access – 0/0 Limited Borrower – 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 5/5
Periodical	Magazines Newspapers	10	10	21 days	E-Access – 0/0 Limited Borrower – 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 5/5

MATERIAL TYPE	EXAMPLES	CHECKOUT LIMIT	HOLD LIMIT	STANDARD LOAN PERIOD	PATRON TYPE EXCEPTIONS Checkout limit/Hold limit
Realia	Board games Library of Things (non- equipment) Puppets Charts Wall maps	100	50	Varies	Passport – 10/10 E-Access – 0/0 Limited Borrower – 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 0/0
Test <i>WCCLS use only</i>		100	50	Varies	
Tote bags <i>Empty bag with library name and barcode</i>		2	0	21 days	E-Access – 0/0 Student – 0/0
Videocassettes		100	50	21 days	Passport – 10/10 E-Access – 0/0 Limited Borrower – 5/5 Local Courtesy – 10/0 Temp No Permanent – 5/0 Student – 0/0

MATERIAL TYPE	EXAMPLES	CHECKOUT LIMIT	HOLD LIMIT	STANDARD LOAN PERIOD	PATRON TYPE EXCEPTIONS Checkout limit/Hold limit
Not used (ZZZ) Admission Passes Audio Cassettes Downloadable Video Electronic Gov Docs Ereader Interactive Multimedia Internet Resources Posters Thesis		N/A	N/A	N/A	N/A
ZZZ (material type) <i>DO NOT USE</i>		N/A	N/A	N/A	N/A

Hold Requests

WCCLS Policy Group is responsible for setting all limits that impact the number of hold requests that can be placed and the number of held items that can be checked out.

Staff at member libraries have the option of restricting hold requests on specific items by using the request options in the item record.

Staff at member libraries are responsible for reconciling holds reports on the prescribed schedule. See *Holds* section of **Data Quality Procedures**.

Fees and Bankruptcy

WCCLS and member library staff do not charge overdue fines for any library materials.

WCCLS Policy Group will establish the types and amounts of fees to be charged or waived.

Fee	Description	Amount
Non-resident card	Annual fee paid by non-resident cardholders and set by Washington County Board of Commissioners	See WCCLS website for current fee.
Replacement Charge	For the full replacement cost of lost, stolen, or destroyed materials. The replacement cost is determined by the retail / list price of the item. Note: Patron-provided replacement materials will not be accepted in lieu of payment.	As set in the item record
Damaged item	For damaged materials, e.g., missing parts and pieces, repairable damages	See Lost/Damaged Parts chart below
ILL Charge	For costs associated with processing some interlibrary loan transactions	Determined by loaning library
Miscellaneous	For other situations for which a specific charge type does not exist	Determined by charging library
NSF Charges	For associated bank fees when a check the patron submitted is returned for insufficient funds	Determined by library who collected payment

Lost/Damaged Parts	Recommended Fee Determined by Owning Library
Single DVD of multi-item set Single BOCD of multi-item set DVD/Blu-ray combo Great Courses piece Language kit	\$10.00 per disc if partial replacement is available from vendor, or full replacement
DVD/Blu-ray/CD/electronic game Case/ER Booklet/Book on CD case	\$1.00, if pattern of damage is detected
Item with multiple parts	Cost of lost part

Vandalism or damage of materials, including but not limited to removal of RFID tags or barcodes and/or marking up spine labels, may incur fees at the discretion of the owning library, particularly if a pattern of damage or vandalism is detected.

Staff at member libraries will charge patrons the non-resident card fee as appropriate and will retain the revenue locally.

Staff at member libraries can waive replacement and damaged item charges up to a maximum of \$75.00 total per patron as a one-time waive for items belonging to other libraries without permission from the owning library.

Staff at member libraries will only waive NSF charges at the library where the charge was assessed.

Staff at member libraries will accept payment for charges from any library and retain the revenue locally.

Whether a library issues refunds or negotiates payment plans is determined by local fiscal policy.

Staff at member libraries will not create credits or deposits on cardholder accounts.

WCCLS will issue bills for lost items and/or charges over \$49.99 to the patron via email or postal mail.

Staff at member libraries follow State and Federal bankruptcy laws when working with past due accounts belonging to library cardholders who have entered the bankruptcy process. See *Bankruptcy* in **Circulation Procedures**.

Staff at member libraries will document the bankruptcy filing notice in cardholder accounts. Accounts for minor children of a bankruptcy petitioner are included in the filing and judgment whether or not they are listed on the filing notice.

While in bankruptcy, checkout will be allowed if the cardholder account does not exceed the check-out limit of \$49.99.

HISTORY

This policy decommissions the following policies: Bankruptcy Policy (2017), Circulation Policy (2015), Circulation Transactions Policy (2020), Collection Agency Policy (2016), Fines and Fees Policy (2019), Hold Requests Policy (2016), Offline Circulation Policy (2017), Registration Policy (2019)

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