



## South Central Onsite Reciprocal Access Program (SCORA) Procedural Manual

### INTRODUCTION

SCRLC was chartered “to improve reference and research library services within the area, and to promote interlibrary cooperation in the use of such resources.” The South Central Reciprocal Access Program (SCORA) is one of many services developed by SCRLC to achieve this-- SCORA helps library users to obtain information resources at their point of need.

The SCORA Program is based on the premise that participating SCRLC libraries’ commitment to cooperation and service extends to library access for serious library users of other regional libraries, even though their collections may not otherwise be open or available in this way.

The program is meant to provide **serious library users** with access to resources not available in the library with which they are primarily affiliated or in other libraries open to the public.

SCORA is particularly helpful to users who 1) need material from another collection *immediately*, 2) need to browse through a specialized collection, 3) lack sufficient bibliographic information for effective interlibrary loan, or 4) need to use resources that cannot be borrowed or photocopied.

SCORA is open to all SCRLC members (including members of public and school library systems) in good standing (i.e., those who are up-to-date on dues, fees, grant reports, etc.). Personal members of SCRLC are eligible through a participating Issuing Library.

SCORA is an official program of SCRLC, authorized and supported by the SCRLC Board of Trustees. Although encouraged, participation in this program is completely voluntary.

### IN BRIEF

**WHAT IS SCORA?** SCORA is SCRLC’s reciprocal access/direct borrowing program that enables the registered users of participating members to create a library account and check out materials from other participating libraries, in person. **SCORA does not replace existing reciprocal onsite agreements; it increases the opportunities for users to borrow onsite from a larger number of libraries.**

**WHO CAN PARTICIPATE?** Current faculty, graduate students, undergraduates, professional and research staff of participating institutions, serious researchers through their public library, and selected high school students.

**WHERE CAN SCORA CARDS BE OBTAINED?** SCORA cards are issued by the user's own library. SCRLC does not issue SCORA cards to individuals. The card is non-transferable.

**WHEN CAN SCORA CARDS BE USED?** SCORA cards are issued to eligible users when they need to use other participating libraries and only after their home library's resources have been exhausted. The SCORA card may be used at the participating libraries listed below, which also lists the participants' levels of access and lending policies. SCORA cards are not designed for use when interlibrary loan would suffice.

**WHY HAVE THIS PROGRAM?** SCRLC was chartered "to improve reference and research library services with the area, and to promote interlibrary cooperation in the use of such resources." This is one of a variety of services developed by SCRLC to achieve this, i.e., helping library users to obtain the information resources at their point of need. It enables serious library users to obtain information resources at their point of need.

## **DEFINITIONS**

**Lending Library** – The library providing services to the visiting library user who has a SCORA Card.

**Home Library/Issuing Library** – The library that issues a SCORA Card to their faculty, students, staff, or eligible users.

## **PARTICIPATING IN SCORA**

The program is open to all SCRLC members in good standing. The home library may issue a SCORA Card to a serious, responsible, eligible user, i.e. no currently overdue books or history of lost or repeatedly overdue material. The SCORA Card may be used at participating libraries. A list of participating libraries is included on the SCRLC SCORA webpage. Access and lending policies vary among participating libraries.

In order to have accurate, up-to-date information about participating libraries' SCORA policies, SCRLC requires participating libraries (borrowers and lenders) to complete the "SCORA Library Participation Form", which is found on the SCORA webpage. The form requests information on:

- Categories of patrons that the Lending Library will lend to (e.g., faculty and graduate students only; all SCORA cardholders, etc.)
- Lending policies or restrictions of the Lending Library
- Delivery methods used by the Lending Library
- Contact information for the individuals at each library responsible for the SCORA Card program.
- Number of SCORA Cards initially needed by the Borrowing Libraries (more are available upon request).

If your library wishes to participate as either a lender or as a borrower, complete this [form](#).

## RESPONSIBILITIES AND PROCEDURES

### HOME/ISSUING LIBRARY

SCORA cards are issued only after the resources of the Issuing Library have been exhausted. Eligible categories of users from participating libraries/systems may include the following as long as the patron is in “good standing” at the Issuing Library:

- Faculty
- Graduate students
- Professional and research staff
- Undergraduate students
- High School Students--Advanced Placement, International Baccalaureate, or Concurrently Enrolled

Issuing Libraries acknowledge that the Lending Libraries determine the level and extent of access allowed by SCORA cardholders. Participating libraries do not need to offer the same level of access—it may not be possible due to local restrictions.

### RETURNING, REPLACING, AND OVERDUE MATERIAL

The home/issuing Library assumes responsibility for the use of the SCORA Card, including fiscal responsibility, overdue fines, or other charges incurred by patrons to whom they have issued cards.

The home/issuing library assumes responsibility for returning any materials borrowed that a participating user may give to them.

Replacement costs for lost or damaged materials should be paid by the person whose signature appears on the card, but ultimately it is the responsibility of the home library to pay the lending library and to collect fees from the user.

### OBTAINING SCORA CARDS

SCORA Cards or template sheets will be sent to the library upon receipt of the completed form and each December thereafter. Here is a sample SCORA Card:



### SCORA Card

Undergrad Grad / Faculty / Researcher / Public / High School  
(Circle One)

Issuing Library \_\_\_\_\_ Card # \_\_\_\_\_

Signature \_\_\_\_\_

Print name \_\_\_\_\_

Date Issued: \_\_\_\_\_ Date Expires: \_\_\_\_\_

Back of Card:

1. This card is non-transferable and subject to the rules of each participating library.
2. You are responsible for replacement costs for lost/damaged materials and any overdue fines incurred.
3. Automatic entrance to participating libraries is not guaranteed--check hours and requirements for appointments.
4. Lending libraries may restrict access to certain categories of SCORA cardholders.
5. Cards are valid for a maximum of one year, from January 1 through December 31.

## HOW TO ISSUE CARDS TO LIBRARY USERS

It is the responsibility of the Issuing Library to determine whether a user needs a SCORA Card or if needed information may be obtained through other methods.

After the need for a SCORA Card has been established by the Issuing Library, the staff member issuing the SCORA Card must explain to the user the program, its options, and limitations. A downloadable table listing SCRLC participating members and their lending policies is available on the SCORA webpage.

Once the user understands SCORA, the Issuing Library and the user should complete the Application Form, also available for download on the SCORA webpage.

The following information is required:

- Date card is issued
- User's name and mailing/home address, phone number and email
- Patron status (faculty, graduate student, etc.)
- Issuing Library Name
- Expiration date (usually December 31, 21xx)
- Unique SCORA Card number (preprinted on card)

The Issuing Library staff must ask for appropriate ID, which should include a picture ID. Some high schools in the SCRLC do not issue picture IDs. Some students in those schools will have driver's licenses. A student lacking a photo ID is encouraged to obtain a non-driver ID. The school library may also be able to facilitate access to the lending library on behalf of the student by calling ahead. SCRLC will investigate ways of funding non-student IDs on a case-by-case basis.

The applying patron must read and agree to the conditions stated in the agreement at the bottom of the application form and sign it.

The application form must be kept by the Issuing Library to ensure confidentiality.

The SCORA cardholder should be made aware that for the SCORA Card to be used at a Lending Library, it must first be validated at that Lending Library and the patron information entered into the user database of that Library (if that is their procedure).

It is particularly important to inform the user of this, as staff that can validate at the Lending Library may not always be available. **Users should be advised to phone ahead, particularly**

**if it is the first-time visiting a given participating library.** Contact the SCORA liaison at that library (listed in the participating libraries list).

**IMPORTANT:** When issuing the card, it is important to write CLEARLY on the card in ink the patron status, i.e. Faculty/Staff, Researcher; Undergraduate; Public; School, etc. Each card must be marked so that the Lending Library can clearly see the status, since not all libraries lend to every category of patron.

The Issuing Library will be responsible for the safekeeping all unused SCORA Cards.

## **LENDING LIBRARY**

All eligible persons will be allowed to borrow materials upon presentation of the SCORA card, subject to the procedures (e.g., inclusion in a user database) and restrictions set by the Lending Library. **Borrowers are advised to consult the list of restrictions and called ahead of time, particularly if this is first-time use.**

**Identification of Eligible Borrowers:** A non-transferable, non-expired SCORA card, issued by a borrower's home library (i.e., the Issuing Library), must be presented. Each card can only be used by the person to whom it was issued.

### **The Lending Library should:**

Check the expiration date on the SCORA Card to ensure it is still valid.

Check the user's status to ensure the Lending Library lends to that category of patron. The patron status should be marked on the card. (Note: if it is not, the Lending Library should ask for a form of ID that indicates the person's status.) Lending libraries may contact the visitor's home library to verify good standing.

Not extend borrowing privileges to SCORA cardholder beyond the card's expiration date. **The Issuing Library is only responsible for materials borrowed by their patrons using valid SCORA cards.**

Check the signature on the SCORA Card against the signature on a second form of identification, preferably a photo ID.

Inform the SCORA cardholder of the policies of your library. The user has access to the policies of all participating libraries and should have consulted the list prior to their visit. The SCORA Card user is governed by the SCORA Use Regulations/Restrictions of the Lending Library.

The Lending Library assumes responsibility for notifying the Issuing Library of any overdue items circulated to the Issuing Library's patrons within 3 months.

## **SCORA CARD EXPIRATION**

A SCORA Card is valid for *up to* one year. Cards generally expire on December 31. Exceptions:

- If the Issuing Library wants to have the card expire before the end of December, it may do so by clearly and boldly marking the expiration date on the SCORA Card (e.g. for graduating students; visiting researchers).
- If a patron applies for the card within the last two month of the calendar year (November or December), the expiration date will be the following year.

## **OVERDUE/RECALLED LIBRARY MATERIALS & PAYMENT TERMS**

**Overdue Material.** It is the responsibility of the Issuing Library to assist the Lending Library in effecting a return of overdue material.

Any fines or replacement costs for materials lost or damaged are the responsibility of the individual borrower. In the event that the borrower does not pay replacement fees or fines associated with his/her account, reimbursement for these items becomes the responsibility of the Issuing Library.

The Lending Library may follow their regular overdue/recall procedures. If normal overdue/recall procedures do not result in the return of the borrowed materials on the first cycle (e.g. one overdue/recall notice), the Lending Library should contact the Issuing Library as soon as possible but, *within three months* of the borrowed material's due date. The SCORA Card Issuing Library will need to know both the identity of the borrower and the material borrowed. **NOTE:** If the Lending Library does not provide the initial notification within three months of the borrowed material's due date, the Lending Library assumes fiscal responsibility for replacing the items, assuming the failure of further attempts to retrieve the material.

If the above procedures have been followed and the SCORA cardholder still has not returned the materials borrowed within six months of the borrowed material's due date, the Lending Library must send a final notification to the Issuing Library. If the above procedures have been followed, the Issuing Library assumes fiscal responsibility for the unreturned items and will reimburse the Lending Library the amount due according to the policies of the Lending Library.

Lending libraries should notify SCRLC of unreturned materials and final outcomes. Although SCRLC's SCORA program is new for 2019, nearly identical programs have existed in other regional library councils for decades. The Councils indicate that losses through their programs have been rare. They believe that successful operation of their programs continue to depend on reasonable screening by the Issuing Library, responsible use, and prompt follow-up by the Lending Library. When the infrequent problems have occurred, immediate communication between staff of lending and issuing libraries has been the most effective action.

Report concerns or problems with SCORA to [cbrown@scrlic.org](mailto:cbrown@scrlic.org) or 607-273-9106 x 204.

## **ACCESSIBILITY**

If borrowers need material(s) housed in Lending Libraries converted to accessible formats due to a disability, the borrower's home/issuing library will be responsible for meeting the user's accessibility requirements. Home libraries will identify a point of contact at their respective institutions for accessibility requests.

## MISUSE OF A SCORA CARD

If there is evidence of misuse of a SCORA Card (e.g., transfer of card to another person, borrowing materials for the use of others, etc.), the Issuing Library will be responsible for recovering the misused card.

**Flagging a patron:** If a SCORA cardholder is no longer eligible for any reason (except expiration of the Card), the Issuing Library should notify SCRLC, which will then email the contact person at all SCORA participating libraries.

## SCRLC'S RESPONSIBILITIES

- Design and distribute SCORA templates to participants for use with their approved library users.
- Maintain the SCORA Program Participants List, including access and lending policies, courier services used, and contact information on the SCRLC website.
- Produce materials including procedures manual and promotional materials used with SCORA.
- Conduct training programs on SCORA Card use as needed.
- Review periodically the SCORA Card program and update program guidelines as needed.
- Monitor any issues/problems that arise; notify participants of non-eligible cardholders, as above.
- Questions and comments should be directed to [cbrown@scrlc.org](mailto:cbrown@scrlc.org) or 607-273-9106 x 204.

## SUMMARY: SCORA Card Guidelines and Regulations

- Each SCORA card is non-transferable and can only be used by the person to whom it was issued.
- Use of the SCORA card is subject to the rules of each participating library.
- Replacement costs for lost or damaged materials must be paid by the person whose signature appears on the card.
- Overdue fines are payable to the lending library by the person whose signature appears on the card.
- The card does not provide automatic entrance to participating libraries. Borrowers must check hours and requirements for appointments of participating libraries.
- Lending libraries may restrict access to certain categories of SCORA cardholders.
- Cards are valid for a maximum of one year, from January 1 through December 31, with no automatic renewals.

The chart of participating SCRLC members and their lending policies are [included here](#).

With thanks to the Rochester Regional Library Council and Western New York Library Resources Council for the ability to use and modify their program documentation.