

# SOP: Circulation and Lending Processes

This SOP details the **circulation and lending processes** within a library or information center, covering the procedures for borrowing, renewing, and returning materials, managing user accounts, handling overdue items and fines, and ensuring efficient and accurate tracking of all loaned resources. The goal is to provide a seamless and user-friendly experience while maintaining the integrity and availability of the collection.

## 1. Purpose

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To provide standardized procedures for managing the circulation and lending of library and information materials to ensure consistency, accountability, and a positive user experience.

## 2. Scope

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This SOP applies to all staff involved in circulation, all library members, and covers physical and digital resources where applicable.

## 3. Definitions

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- **Circulation Desk:** The service point for lending and returning materials.
- **User Account:** A registered library membership enabling access to circulation services.
- **Loan Period:** The duration a borrower can keep materials.
- **Renewal:** Extension of the original loan period.
- **Overdue:** Items not returned by the due date.

## 4. Procedures

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1. **User Registration & Verification**
  - Collect identification and contact details from the user.
  - Create or update user account in the library management system.
  - Issue a library card or digital access credentials.
2. **Borrowing Materials**
  - User presents items and library card at circulation desk or self-checkout.
  - Scan items and verify eligibility (item status, user borrowing limit, outstanding fines).
  - Confirm loan period and due date; print or send transaction receipt.
3. **Renewals**
  - User requests renewal in-person, online, by phone, or via self-service.
  - Check for existing holds, item eligibility, and user account status.
  - If eligible, process renewal and provide updated due date.
4. **Returns**
  - User returns items to the circulation desk or designated return area.
  - Scan returned items; check for damage or missing components.
  - Update item status in the system and reshelve.
  - Notify user of outstanding items or fines if applicable.
5. **Overdue Items & Fines**
  - Monitor overdue items regularly using library management system reports.
  - Notify users per policy (e.g., email, SMS, phone).
  - Apply fines/penalties based on overdue schedule; update user account accordingly.
6. **Lost or Damaged Materials**
  - Assess lost/damaged items and inform the user of charges or replacement procedures.
  - Update the system and clear records upon payment or return.

## 5. Roles and Responsibilities

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- **Circulation Staff:** Execute all circulation processes, assist users, and resolve issues.
- **Library Members:** Abide by borrowing policies and return items on time.
- **Library Manager:** Oversee circulation functions and update policies as needed.

## 6. Recordkeeping and Reporting

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- Maintain accurate transaction records in the library management system.
- Generate and review circulation reports for auditing and collection management.

## 7. Policy Review

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This SOP should be reviewed and updated annually or as needed to accommodate changes in library services, technologies, or user needs.

**Note:** All staff must be trained on circulation procedures and customer service best practices to ensure a consistent and user-focused approach.