

Update Information
2020 Update Number 1

<i>DCM</i>	<i>Title</i>	<i>Action/Change</i>
M5	Library of Congress Series Policy	Revised criteria for analyzing parts of complete editions of collected works of individual composers. Replace.
Z1	Name and Series Authority Records	008/33 – Level of Establishment. Added instruction for government bodies in Macau and Hong Kong. Replace.
Z1	Name and Series Authority Records	667 – Nonpublic General Note. Added instruction to record also in a 670 field a subtitle that could be interpreted as a title proper. Replace.

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M5.1 GENERAL POLICY

Abbreviations used:

BR = bibliographic record
LCDB= Library of Congress database
SAR = series authority record

The LC policy on series, implemented on June 1, 2006, is to analyze in full, classify separately, and not provide a controlled series access point. The pertinent sections of DCM Z1 (*Name and Series Authority Records*) have been updated to reflect this policy. See M5.6 for exceptions to the general policy to analyze in full and classify separately.

M5.1.1 Series Authority Records

Do not consult, modify, or create any SARs when preparing or updating BRs for LC.

Exception: Consult series authority records when searching to determine if there is a conflict in the database to ensure unique authorized access points for entities.

M5.1.2 Bibliographic Records

M5.1.2.1 *BR is original LC cataloging*

Give the series data elements (title proper, parallel titles, other title information, statement of responsibility, ISSN, numbering) in a 490 0# field. Do not provide a controlled series access point.

M5.1.2.2 *BR is not original LC cataloging*

Accept the series fields as given.

M5.1.2.3 *File maintenance and other matters*

See the appropriate section of M5 for instructions.

M5.2 SERIES AND CIP PARTNER RECORDS

Bibliographic records created by CIP partner libraries may contain controlled series access points. LC accepts that treatment but does not search the series or confirm authority work.

M5.3 SERIES AND COPY CATALOGING RECORDS

Bibliographic records imported by LC for copy cataloging may contain controlled series access points. LC accepts that treatment but does not search the series or confirm authority work. LC does confirm the presence and accurate transcription of the series statement for the resource on hand.

M5.4 BIBLIOGRAPHIC FILE MAINTENANCE

Do not change 440 or 8XX fields for series access points when performing BFM for existing cataloging records in the LCDB that reflect LC's series policy prior to June 1, 2006. Other fields, including the 490 field may be updated as needed.

Some records for resources in a monographic series may contain two classification numbers in the 050 field in accordance with LC's practices prior to June 1, 2006. Do not change these classification numbers if they were correct when originally assigned (cf. CSM F 170).

Examples:

050 00 \$a QH301 \$b .C5 no. 586 \$a GC511

050 00 \$a D1 \$b .A25 no. 5, etc. \$a BR735

Note: Change requests for CIP partner records will be handled in USPRLL/CIPDEW.

M5.5 AUTHORITY RECORD UPDATES AND DELETIONS

If the heading in a name authority record is changed and there are associated any SARs that also require updating, contact the **Policy, Training, and Cooperative Programs Division (PTCP)** (policy@loc.gov) to update the SARs.

LC catalogers serving as NACO liaisons and **PTCP** will answer questions from PCC participants about creating and updating series authority records. The PCC participants, rather than LC staff, should create and update the authority records.

ABA will delete duplicate SARs reported by PCC participants. **PTCP** will delete duplicate SARs reported by non-PCC libraries; **PTCP** will process error reports and answer questions from these libraries if doing so does not involve research or retrieval of volumes, etc.

M5.6 EXCEPTIONS TO THE GENERAL LC SERIES POLICY

M5.6.1 Not Analyzed/Classified As a Collection

The following categories will not be analyzed and will be classified as a collection; SARs will not be consulted, created, or updated:

M5.6.1.1 *Numbered multipart monographs with all parts lacking analyzable titles*

- 1) create and update a collected set record for the multipart monograph as a whole;
- 2) classify together.

M5.6.1.2 *2A cataloging*

Unnumbered multipart monographs cataloged per “2A cataloging” guidelines (“2A cataloging” is a local LC practice to create a made-up collected set record for an unnumbered multipart monograph, assigning numbers to parts as received):

- 1) create and update a collected set record for the multipart monograph as a whole;
- 2) classify together.

M5.6.1.3 *Auction and sales catalogs*

- 1) create or update the serial collected set record for the catalogs using a made-up title;
- 2) analyze and classify separately an individual catalog only if identified by a selection officer as of particular interest;
- 3) classify together.

M5.6.1.4 *Legal multipart monographs identified by LC’s Law Library*

- 1) create and update collected set record for the multipart monograph as a whole;
- 2) give author-title added entries;

- 3) classify together.

M5.6.2 Not Analyzed/Not Classified

Technical report series identified by LC's Science, Technology, and Business Division or LC's Asian Division and shelved in those divisions will not be analyzed and will not be classified; series authority records will not be consulted, created, or updated:

- 1) create and update a local serial record;
- 2) do not assign a call number (shelved in ST&B and in Asian).

M5.6.3 Analyzed in Full/Classified As a Collection

The following categories will be analyzed in full but will be classified as a collection; series authority records will not be consulted, created, or updated:

M5.6.3.1 Scholarly collections of music historical sources eligible to be classified together in M2

- 1) create and update collected set record for the multipart monograph or monographic series as a whole;
- 2) analyze in full and give series statement in a 490 0# field or pass through series information in cataloging copy;
- 3) classify together in M2.

M5.6.3.2 "Web access to monographic series" project for social sciences resources

- 1) create and update serial collected set record for the monographic series as a whole;
- 2) analyze each volume via program; give series statement in 490 0# field or pass through series information in cataloging copy;
- 3) classify together.

M5.6.3.3 Microform sets

- 1) create and update collected set record for the multipart monograph or monographic series as a whole;
- 2) analyze in full and give series statement in a 490 0# field or pass through series information in cataloging copy;
- 3) classify together (one shelf number for the set as a whole).

M5.6.3.4 Proceedings of a single conference published in more than one volume with analyzable volume titles

- 1) create and update collected set record for the multipart monograph as a whole;
- 2) analyze each volume; give series statement in 490 0# field or pass through series information in cataloging copy;
- 3) classify together.

M5.6.3.5 Legal monographic series and multipart monographs identified by LC's Law Library

- 1) create and update collected set record for the multipart monograph or monographic series as a whole;

- 2) analyze in full and give series statement in a 490 0# field or pass through series information in cataloging copy;
- 3) classify together.

M5.6.4 Analyzed in Full: Applies to Analyzable Parts/Classified As a Collection

Complete editions of collected works of individual composers (classified as M3) will be analyzed in full: applies to analyzable parts and will be classified as a collection; series authority records will not be consulted, created, or updated.

- 1) Create or update the collected set record for the multipart monograph.
- 2) Analyze a part only if it meets one of the following criteria:
 - a) A single part (in one or more physical volumes) contains a single musical work or a single excerpt from a work.
 - b) A single part (in one or more physical volumes) contains two musical works or two excerpts from one or two works.
 - c) A single part (in one or more physical volumes) contains three or more musical works or three or more excerpts from three or more works and copy exists where each work has an analytical added entry which is validated by an already existing authority record.

“Musical work” as applied here includes either a musical composition that is a single unit intended for performance as a whole, or a set of musical compositions with a group title (not necessarily intended for performance as a whole), or a group of musical compositions with a single opus number.

In an analytic record, give series statement(s) in 490 0# field(s) or pass through series information in cataloging copy.

For a non-analyzable part, create only item record and link it to the collected set bibliographic record.

- 3) Classify together in M3.

M5.6.5 Not Analyzed/Classified As a Collection (Applies to Acquisitions)

Already cataloged numbered monographic series assigned “not analyzed/classified as a collection” decisions prior to June 1, 2006 applies to acquisitions staff; this category is included here for information:

- 1) follow check-in procedures for issues of serials
- 2) forward issues to custodial divisions.

M5.6.6 BRs Not Yet in LCDB

Previously existing BRs not yet in the LCDB that are now being newly input will reflect the series decisions (i.e., presence or absence of controlled series access point; a classed-separately or a classed-as-a-collection call number) at the time the resource was cataloged originally.

008/33 Level of EstablishmentNARs

Provisional (008/33 value “c”) records:

General

Code an NAR as provisional (008/33 value “c”) if the authorized access point cannot be formulated satisfactorily because of inadequate information. If the necessary information later becomes available, re-evaluate the NAR and upgrade it to fully established (008/33 value “a”). In no case should a provisional-level authority record be created with an access point that conflicts with an existing NAR according to NACO normalization rules.

Special administrative regions of Hong Kong and Macau

Because there is uncertainty about whether Hong Kong and Macau will continue to have two official languages, code all NARs for government bodies in these two places, at the level of the special administrative region and below, as provisional (008/33 value “c”), regardless of the language in which the authorized access point has been established. If a form in the second of the two official languages becomes available, add that form as a variant access point rather than revising the existing authorized access point. Consult RDA 11.2.2.5.2 and its related policy statement for instructions on choosing the language of the preferred name. Please note that this policy for provisional status does not apply to non-government bodies.

Additional information for PCC participants

NACO participants may **also** create provisional records in the following **two** exceptional situations:

(1) If the contributing library does not have the language expertise to establish the **authorized access point** as a fully established authority record; this would include situations where the library lacked adequate reference sources for research or where the cataloger was not confident of the correct grammatical form **for the access point**.

(2) If the contributing library is unable, due to limited resources or other constraints, to complete related authority work or to determine the appropriate reference structure that is required for fully established **authority records**.

The **Policy, Training, and Cooperative Programs Division (PTCP)** is prepared to provide language expertise, etc., to NACO participants on request (**coop@loc.gov**), so that such **records** can be fully established at the time they are contributed.

BIBCO participants may not create provisional records in the two exceptional situations noted above for NACO participants if the NARs being contributed are in support of BIBCO bibliographic records, i.e., those records with “pcc” in the **042 field**.

Preliminary (008/33 value “d”) records:

Preliminary authority records (008/33 value “d”) generally are the result of retrospective projects. LC catalogers are expected to upgrade NARs coded preliminary when using the **access point** on a bibliographic record. **NACO** catalogers are expected to routinely upgrade NARs coded preliminary when making other modifications to the record. Because of this maintenance requirement, NACO participants are asked to contact the **Policy, Training, and Cooperative Programs Division** (coop@loc.gov) before embarking on projects that may result in large numbers of NARs coded preliminary being added to the NACO Authority File.

As needed, catalogers may upgrade NARs coded preliminary when working with earlier/later corporate body **records, even if the access points in the records** being upgraded **are** not used in the local bibliographic database. Occasionally catalogers may need to create a new **NAR** without having an item in hand, e.g., for an earlier or later name heading using information from reference sources, or a heading based on information found in field 245 subfield “c” of bibliographic records when resolving NAR conflicts. Do not code these occasional NARs as “preliminary.”

SARs

LC series practice: As of June 1, 2006, LC does not create or update SARs

PCC series practice: Transcription of the series statement is mandatory if applicable. Searching for series authority records, tracing the series, and the creation and maintenance of series authority records are optional.

Generally, series data elements should be viewed on the publication and series authority records should be coded “a” (full). In post-cataloging authority work it is permissible to create SARs without the piece in hand; these records are coded “d” (preliminary). When a publication in the series has been examined and the preliminary authority record reviewed and updated as necessary, upgrade the SAR to full level.

667 Nonpublic General Note

LC series practice: As of June 1, 2006, LC does not create or update SARs.

PCC series practice: Transcription of the series statement is mandatory if applicable. Searching for series authority records, tracing the series, and the creation and maintenance of series authority records are optional.

General

Give information of permanent value and general interest that would be useful also to institutions outside of LC and to LC staff not working in the LC Database. A representative listing of notes is given below. Generally, wording is recommended but not prescriptive unless specified in the instructions. The separate 667 fields may be given in any order.

Examples:

667 ## \$a Not same as: [name or title, LCCN].

667 ## \$a Cannot identify with: [name or title, LCCN].

667 ## \$a Reinvestigate before using again.

667 ## \$a Formerly on undifferentiated name record: [LCCN of undifferentiated name record].

667 ## \$a Coded provisional because [reason for coding].

667 ## \$a Date of birth removed from all fields per author request, [date updated].

667 ## \$a For works issued before/after [date].

(Used for official language changes)

See DCM Z12 (Special Projects for Name Authority Records and Bibliographic Records) for information and instructions about 667 fields added to authority records as part of a special project.

NARs for persons with identities not established

When a person uses two or more identities in manifestations, name authority records may be created for each identity. In the interest of efficiency, LC/PCC catalogers may use a 667 field to list pseudonyms not found in publications instead of creating NARs for these unused pseudonyms. In this case, list the unused pseudonyms in a 667 field following the phrase: "Pseudonyms not found on published works."

Example:

667 ## \$a Pseudonyms not found on published works: Miz Scarlett, SCC,

and Stevenopolis.

This note may also be added to an NAR for a person who has multiple NARs for multiple identities when some of the pseudonyms are not found in publications. In this case, list **only** the unused pseudonyms in the 667 field, and follow appropriate instructions for the other pseudonyms.

Example:

```
100 1# $a Gorey, Edward, $d 1925-2000
500 1# $w nnc $a Dowdy, Regeera, $d 1925-2000
500 1# $w nnc $a Mude, O., $d 1925-2000
663 ## $a For works of this author written under other names, search
      also under: $b Dowdy, Regeera, 1925-2000 [...]
667 ## $a Pseudonyms not found on published works: Drew Dogyear,
      Wardore Edgy, [...]
```

More information on creating NARs for persons with alternate identities is available in DCM Z1, 663 section, and the *FAQ – LC/PCC practice for creating NARs for persons who use pseudonyms* (<http://www.loc.gov/catdir/cps/pseud.pdf>).

NARs for series of conferences, etc. (LC-PCC PS 11.13.1.8.2)

Add a 667 field on the NAR for the collective conference when there are authority records for both collective and individual instances of an ongoing conference.

Example:

```
110 2# $a Veterinary Orthopedic Society. $b Annual Conference
667 ## $a See also related access points for individual instances of
      this conference which include specific information about the
      number, date, or place of the individual conference.
```

NARs and subject usage

Apply these instructions when creating new NARs and revising existing NARs.

(1) Add notes indicating subject cataloging usage when an authorized access point is not appropriate for use as a subject heading for these situations:

(a) *Heads of state, etc.*

This instruction applies to NARS for corporate bodies representing the office when the name of the incumbent is included as part of the authorized access point for the corporate body. See RDA 11.2.2.18 (Government Officials) and 11.2.2.26 (Religious Officials) for instructions on the corporate bodies. Use this 667 note on the NAR for the corporate body to indicate subject cataloging usage:

```
667 ## $a SUBJECT USAGE: This heading is not valid for use as a
```

subject. Works about this person are entered under [personal name heading].

Assign value “n” in 008/11 and value “b” in 008/15.

Examples:

```
008/11 = n
008/15 = b
110 1# $a United States. $b President (1923-1929 : Coolidge)
667 ## $a SUBJECT USAGE: This heading is not valid for use as a
      subject.
      Works about this person are entered under Coolidge, Calvin,
      1872-1933.
```

```
008/11 = n
008/15 = b
110 2# $a Catholic Church. $b Pope (1503-1513 : Julius II)
667 ## $a SUBJECT USAGE: This heading is not valid for use as a
      subject. Works about this person are entered under
      Julius II, Pope, 1443-1513.
```

See also DCM Z1 008/11 and DCM Z1 008/15.

(b) Earlier/later linear jurisdictional name changes

It is LC subject cataloging policy to assign as a subject access point or as a geographic subdivision only the latest name of a political jurisdiction that has had one or more earlier names, as long as the territorial identity remains essentially unchanged (cf. SHM H 708). When creating a NAR with an earlier/later authorized access point for a place in in this situation, catalogers must add a 667 subject usage note to the authority record with the earlier place name and adjust the appropriate 008 fields (008/11 and 008/15).

Example:

```
008/11 = n
008/15 = b
151 ## $a Ceylon
667 ## $a SUBJECT USAGE: This heading is not valid for use as a
      subject. Works about this place are entered under Sri Lanka.
```

(c) NARs for families

Authorized access points for families are not valid for subject use. In an NAR for a family, 008/11 should be set to value “n” and 008/15 should be set to “b.” Per LC-PCC PS 10.0, when creating an NAR for a family add this 667 field noting subject usage:

```
667 ## $a SUBJECT USAGE: This heading is not valid for use as a
      subject; use a family name heading from LCSH.
```

(2) Add this note to a name authority record for a city section indicating that it is not appropriate for use as a geographic subdivision (see SHM H 835 for more information):

```
667 ## $a SUBJECT USAGE: This heading is not valid for use as a
      geographic subdivision.
```

Example:

```
151 ## $a Hollywood (Los Angeles, Calif.)
667 ## $a SUBJECT USAGE: This heading is not valid for use as a
      geographic subdivision.
```

Non-Latin script reference notes

In an authority record that contains a non-Latin script variant access point, use the 667 field with a note stating: “Non-Latin script reference not evaluated.” If there are multiple non-Latin script variant access points, use a note stating: “Non-Latin script references not evaluated.” Assign 008/29 value “b” to indicate that the variant access point is not evaluated.

Example:

```
008/29 = b
100 1# $a Xi, Jinping
400 1# $a 习近平
400 1# $a 習近平
667 ## $a Non-Latin script references not evaluated.
```

MESSAGE notes (LC practice)

Use a note in the 667 field to indicate that an authority record is not yet finished or that it needs further investigation. Use the note only when the work cannot be completed promptly.

If a new authority record cannot be completed immediately, adjust the code in LDR/17 from “n” to “o” and add the 667 note: “MESSAGE: Early notice.” When the record has been completed, change the code back to “n” and delete the 667 MESSAGE note.

If an existing authority record needs investigation that cannot be completed immediately, adjust the code in 008/31 from “a” to “b” and add this 667 note:

```
667 ## $a MESSAGE: Being updated.[code and date]
```

Additional information explaining the problem may be added, if considered useful. When the record has been revised as necessary, change the value back to “a” and delete the 667 MESSAGE note.

SARs

(1) Notes on the title proper:

There may be a clear pattern of fluctuation between two or more forms of title proper of a numbered series (based on information in the database or from items in hand). There may be a change in the form of the title proper that is not considered a title change (see RDA 2.3.2.13.2). Use a 667 field in lieu of a 670 field to indicate the different title proper that is not generating its own SAR. Give that form of the title proper in a 4XX field.

Examples:

667 ## \$a Some issues have title: [title proper]

667 ## \$a Vol. 8 has title: [title proper]
(Used for fluctuating titles)

667 ## \$a Vols. 9- have title: [title proper]
(Used for a minor title change)

If the subtitle could be interpreted as the title proper of the series or as a subseries, note the subtitle in a 667 field, **record it in a 670 field**, and give it as a 4XX variant access point.

667 ## \$a Subtitle: [title of subtitle]

Do not use the 667 field to indicate variant titles of the series title proper found on the same item (e.g., form of series title on cover is different from form of series on series title page); note the variant titles in 670 field(s) and give them as 4XX variant access points.

(2) Notes on the relationship to other series/records:

If a series authority record represents a publication that is a successive entry that has occurred after a series was last handled under pre-AACR 2 rules but for which no SAR yet exists, give the information only in a 667 field rather than in 675/5XX fields. Label it, in square brackets, as an unevaluated catalog entry form.

667 ## \$a Continues: [pre-AACR 2 catalog entry form]
(Unevaluated catalog entry form)

667 ## \$a Continued by: [pre-AACR 2 catalog entry form]
(Unevaluated catalog entry form)

When the pre-AACR 2 catalog entry form is being evaluated in terms of construction of the RDA authorized access point, delete this 667 and replace it with appropriate 675/5XX fields on both SARs.

If the earlier publication was not analyzable, give the information only in a 667 field rather than in 675/5XX fields.

Example:

667 ## \$a Continues the not-analyzable serial: Directory of computer assisted research in musicology.

When the optional linking variant access point cannot be given between the RDA form and the previous form due to NACO normalization, if desired give the previous authorized access point's information in a 667 field. Use one of the notes given below. (See "NACO normalization" section in Introduction.)

Use this 667 note if the variant access point would normalize to the same form as the RDA authorized access point or another variant access point on the same record or to the same form as an authorized access point on another record:

667 ## \$a Old catalog heading: _____.

Use this 667 note if two or more pre-RDA authorized access points will be treated as one authorized access point under RDA:

667 ## \$a Includes old catalog headings: [pre-RDA a.a.p. 1]; and, [pre-RDA a.a.p. 2].

Use this 667 note if one pre-RDA authorized access point will be split under RDA:

667 ## \$a Previous to RDA covered by: [AACR2 a.a.p.].

(3) Notes on the publisher/issuing body:

When there are more than two changes of publisher or when there have been more than two different consecutive bodies both issuing and publishing the publication, give all of the changes in separate 643 fields or use only one 643 field and give an explanation in a 667 field. The explanation should be as specific as is appropriate for the situation.

Examples:

667 ## \$a Imprint varies.

667 ## \$a Publisher varies.

667 ## \$a Published by various offices of the Division of Education.

(4) Notes on the type of publication:

If the series is a document series, give a 667 note:

667 ## \$a Document.

If the publication has changed its identity (e.g., from a monographic series to a periodical), give a 667 note that indicates what happened, which will explain why a full set of analytic records is not

available.

Examples:

667 ## \$a Telephone call to publisher, 11-2-88: Change in pattern of publication; v. 1-17 monographic works, v. 18- collections of articles.

667 ## \$a Publication was periodical for v. 1-3; monographic series beginning with v. 4.

(5) Notes on the handling of series-like phrase:

667 ## \$a Do not give as a quoted note.

667 ## \$a Give as a quoted note.

667 ## \$a Give as a quoted note if [name of publisher] is not recorded in the publication, distribution, etc. area of the bibliographic record.

(For phrase that combines name of publisher and a generic term)

667 ## \$a Is an imprint, not a series. Record in publication, distribution, etc. area of the bibliographic record.

(For imprint that could be construed to be a title, e.g., Metropolitan Books)

667 ## \$a Give as a quoted note, including the number, e.g., AAI no. 85-41.

667 ## \$a Give as other title information in the title and statement of responsibility area of the bibliographic record.

(6) Notes on an undifferentiated phrase record:

When converting a series-like phrase for a single phrase to an undifferentiated phrase record to cover the same phrase used by more than one publisher, give a 667 note using the wording given below. (See the Introduction for more information about these records.)

667 ## \$a Undifferentiated phrase record: Covers all instances when this character string used by any publisher is considered to be a series-like phrase; if character string is to be series, separate SAR has been made.

Optionally, provide a second 667 note: "Give as a quoted note." If a different handling is desired for one instance of the phrase, either (a) make a separate phrase SAR and add a qualifier to its 1XX entry, or (b) add another 667 note in the undifferentiated phrase SAR: "For resources published by [_____], give the phrase as [_____]."

(7) Notes on the post-cataloging authority records:

When creating a post-cataloging SAR, that is, one established without the piece in hand, give a 667 note with the wording below:

667 ## \$a Series authority record created without piece in hand.

When a preliminary record with this note is upgraded to full level, delete the note.

(8) Miscellaneous notes:

667 ## \$a Previous to AACR 2 subsumed under made-up set for UN documents.

(See 64X section for more information about UN documents)

667 ## \$a First printing of vol. 8 of the Princeton theological monograph series erroneously carried the series statement: Pittsburgh theological monographs.

667 ## \$a Phone call to Borgo Press 1-20-84: Starmont Press series; Borgo reprints all titles generally 6 months to a year later in cloth.

667 ## \$a Lacked analyzable titles until v. 9.

667 ## \$a Indexed in: Social sciences index.

(For a series not being analyzed)

667 ## \$a Establish separate records for English and Spanish titles if Spanish edition of v. 3 is received.