

Lost Item Procedures: I-SHARE Guidelines for Processing Returned Lost Items

Preface

All I-Share libraries are responsible for discharging returned items to stop fine accruals before sending the item on to its next destination, whether to your own library location (i.e., branch to branch) or another I-Share library location.

I-Share **owning** libraries are responsible for sending overdue notices and bills for fees, lost items, or fines **directly to the patron** holding the material. Notices/bills with valid mailing addresses should be sent via the US Postal Service. **Notices and bills for patrons with campus addresses to be delivered via ILDS should be properly addressed, in envelopes, and ready to go into that school's campus mail.** When the I-Share patron is not directly affiliated with the owning library, the patron's home library will assist in recovering items when necessary.

When processing returned items that have reached the status of Lost, library staff must make manual updates to patron records in order to reconcile their accounts and counters. The procedures below describe workflows for the most frequently encountered Lost scenarios.

Sections: Overview of processing Lost items
 Steps for processing locally owned Lost items
 Steps for processing Lost items belonging to other libraries

Overview of Processing Returned Lost Items:

When an item is discharged in Voyager, the obvious link between the item and the patron who borrowed the item is removed when the discharge screen is closed, unless there are fines/fees associated with the item. (While the discharge screen is still open, you may access the patron record by clicking on the Patron icon while the item record line is highlighted on the discharge screen or by left clicking on the word Discharge at the top of the screen and selecting "Go to Borrowing Patron...") However, the patron's **Lost Item billing fee(s)** and **Lost Item counters** are *not* updated to reflect that the item is no longer lost. Handling the return of items that have the item status of Lost requires that staff have sufficient authorization to edit patron and/or stub records. If this is not possible at the point of return processing, items with Lost status should be set aside for processing by staff with security levels that allow edits of patron records and resetting of patron counters. **When an "assumed lost" item returns to your library, promptly remove the replacement charge from the UB borrower's account.** Patrons who have returned "lost" items should not still be charged a lost item replacement fee.

To ensure that returned items are handled correctly, libraries will probably want to separate local items from remote items prior to actual discharge. The procedures for discharging items belonging to other libraries is slightly different than the procedures for locally owned items and will be described in detail later in this document.

If a Lost item is returned directly to the owning library by a patron, the owning library may update the patron's record when discharging the item. If this is not possible due to security restrictions or other workflow routines, one alternative is to use the daily "Item Related Exceptions" report to identify the Lost items that were discharged locally. The owning library would need to review this report regularly and clear the Lost item fees and counters from the appropriate patron records.

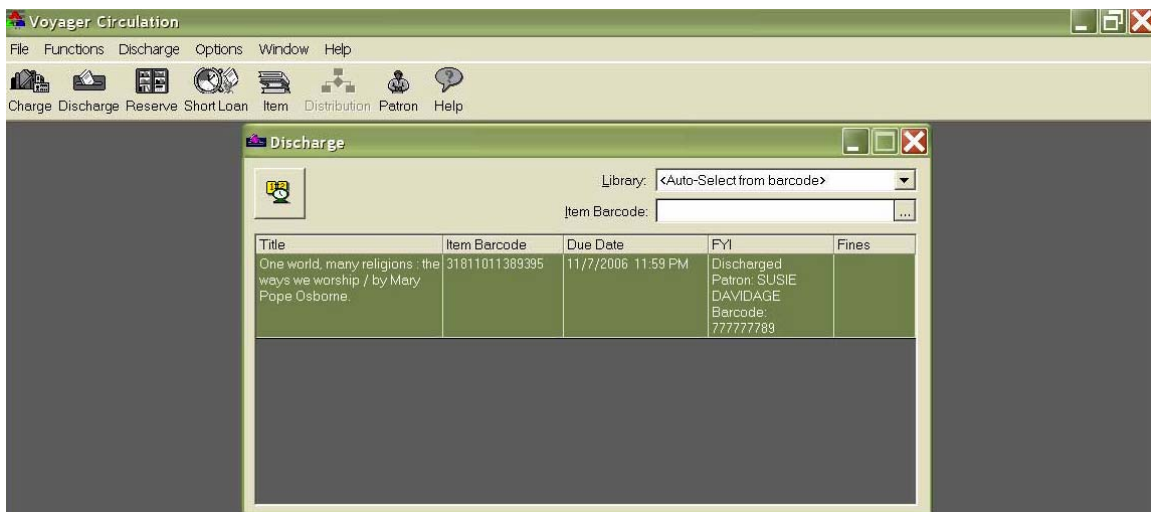
Note: Some I-Share libraries bill their patrons directly while others use the Bursar Transfer System (BTS) to send the billing to a campus billing office. If your library uses BTS, the fines/fees will move to the Fines/Fees History Tab after the Bursar Transfer program is run.

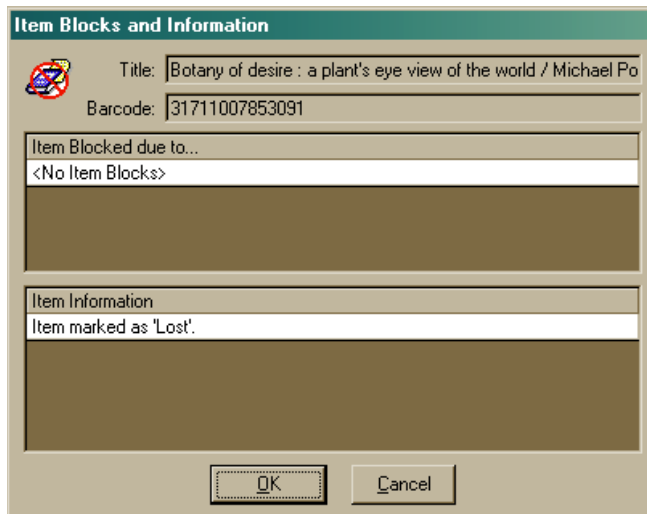
Steps for processing locally owned Lost Items:

1. Start the discharge process, and scan the item's barcode.

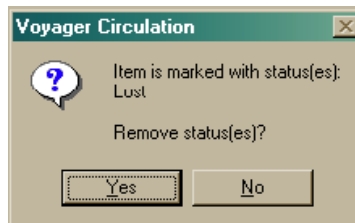


2. If the item is Lost, Voyager will immediately notify the operator with the "Item Blocks and Information" screen illustrated on the next page.
3. **IMPORTANT: At this point, workflow may differ according to the Operator's security level and/or a library's workflow decisions:**
 - a. If the Operator has low-level security, click [cancel], and **set the item aside** for Supervisor to process, using steps 4 through 10 or 12 below.
OR
 - b. If the Operator has low-level security, click [OK] to create an exception, then staff with appropriate authority can **use the next morning's "Item Related Exceptions Report"** to clear the patron record, according to steps 5 through 10 or 12 below.
 - c. If the Operator has the appropriate **security to complete the entire process**, click [OK] and follow steps 5 through 10 or 12 below to clear the patron record.
OR
 - d. If **the library uses discharge alerts** to note patron information at the time of discharge *and* the Operator has the appropriate **security to complete the entire process**, the operator may click [OK], follow step 5 and then go directly to the patron record by clicking on the patron icon while the item information is highlighted on the discharge screen, as pictured:



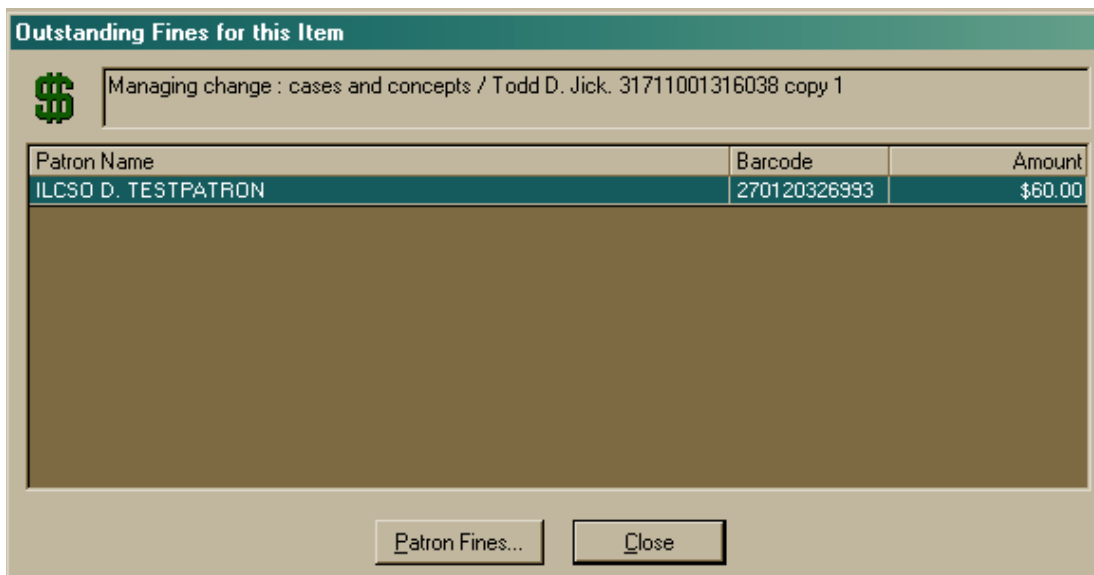


4. Click [OK]
5. After clicking [OK], Voyager then displays the status pop-up box:



Click [Yes]

6. From the item record screen, click on *item* from the top screen menu bar and select “Outstanding Fines” to bring up the “Outstanding Fines for this Item” screen. If there is more than one fine listed, select (highlight) the appropriate patron and click on [Close]. **Note: Libraries that use the Lost Items counter to track the number of items a patron allows to go to lost status and do not want to see the full patron record may choose to click on [Patron Fines] and skip steps 7 & 8 and steps 11 & 12.**



NOTE: For libraries using Voyager's Bursar Transfer System [BTS]: The patron fine information is there only if the charge has *not* been transferred using Voyager's BTS. When lost item fines/fees are transferred through BTS they move from Outstanding Fines/Fees to Fines/Fees History and can no longer be seen by patrons in "My Account." Once the charge has been picked up by the BTS, the link between the item and patron is gone, and the patron info is no longer on the Item Exception Reports.



7. Click on the Patron Icon from the screen top menu and the full patron record will appear.
8. Click on the Fines/Fees icon [\$] in the patron record to bring up the "Patron Fines/Fees" screen.

Patron Fines/Fees

\$\$\$ MARY ELLEN FARRELL

Outstanding Fines/Fees			Fines/Fees History			
Date	Title	Barcode	Fee/Posting Type	Fee	Posting	Balance
11/23/2004 04:09 PM	Botany of desire : a plant's eye view of the world / Michael Pollan.	31711007853091	Lost Item Replacement	\$50.00		\$50.00
11/23/2004 04:09 PM	Botany of desire : a plant's eye view of the world / Michael Pollan.	31711007853091	Overdue	\$10.00		\$10.00

Total Due \$60.00

Description:

Charge Date: 8/20/2004 12:42 PM Operator: _____

Due Date: 10/8/2004 09:00 PM Location: _____

Billed: _____

[Item Info...] [Print] [Add...] [Pos...] [Close]

9. Select (highlight) the Lost Item Replacement fine and click [Post...] to bring up the Post Against Fine/Fee screen.
10. Forgive the *Selected* amount and click [OK].

You must choose (click in the circle next to) "Selected" if you are not forgiving the total of all fines/fees and choose forgive from the posting type drop down box. Fill in the amount with the amount of the item fine record being cleared.

Post Against Fine/Fee

Post Against: Selected Patron Total [OK]

Posting Type: [Forgive] [Cancel]

Amount: [\$50.00]

Method: []

Description: []

NOTE: For libraries using Voyager's Bursar Transfer System [BTS]: Create and use a report that lists items that are currently lost, and that includes the patron info. Then maintain that report regularly and search against it for the returned lost item to find the patron info. Or, run a daily report of everything that's lost, and compare today's report with yesterday's to cull out everything that was lost yesterday, but isn't today. Once fines are transferred you must select "**Bursar Refund**" as the posting type to waive them.

Note: At this point workflow may differ according to local library practices. Some libraries do not reset the counter when a lost item is returned. This counter may be used to track the number of items a patron keeps until lost status is reached in order to identify repeat or chronic offenders.



11. Click the “Counters” icon to bring up the “Set Patron Counters” screen:

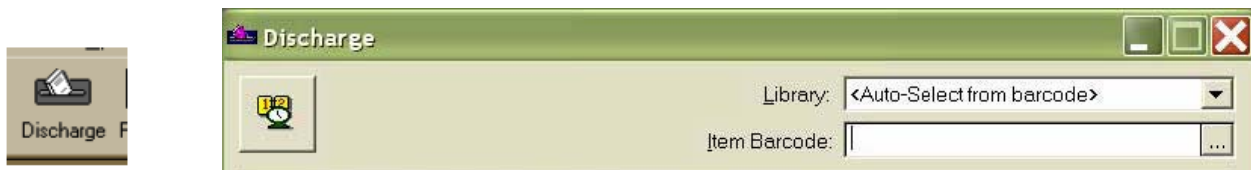
Counter Name	Value	Counter Name	Value
Items Borrowed (historical):	383	UB Items Borrowed (historical):	6
Claims Returned:	1	UB Claims Returned:	0
Lost Items:	0	UB Lost Items:	1
Self-Shelves:	1	UB Self-Shelved:	0
Call Slips Placed (historical):	30	UB Items Requests (historical):	4
Short Loans Placed (historical):	0		
Item Distributions (historical):	0		

12. Decrement the Lost Item counter by 1 and click on [OK].

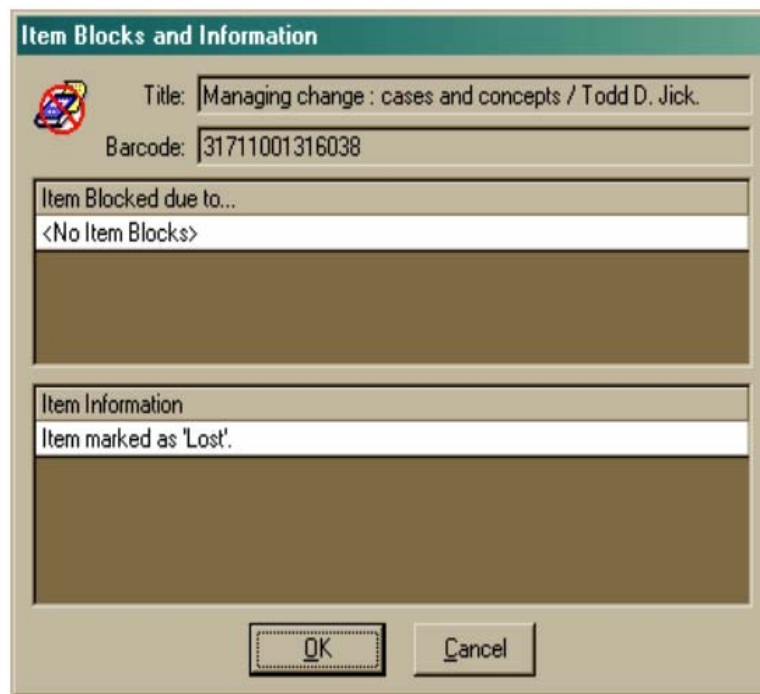
Steps for processing Lost items that belong to other I-Share libraries

The I-Share practice of UB Integration of patron groups in each other’s databases avoids the issue of the “UB Lost” counter in the HOME patron record. The UB counters in the HOME record will not cause threshold blocks because we don’t implement UB Policies in System Administration. Threshold blocks are controlled by the counters in the stub records in the individual library databases. Decrementing the appropriate stub record counters when dealing with Lost Item returns may be important if the library has set a very low block threshold for UB users.

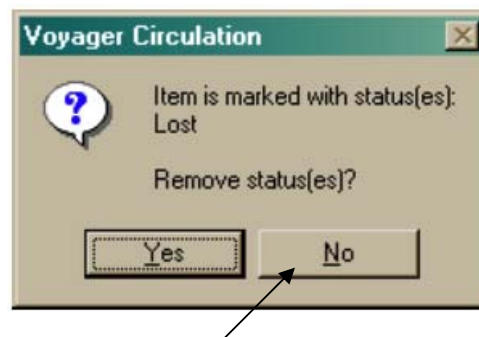
1. Click on the Discharge icon to bring up the discharge screen and scan the item's barcode to start the discharge process.



2. If the item is Lost, Voyager will immediately notify the operator with the "Item Blocks and Information" screen:



3. Click [OK]
4. After clicking [OK], Voyager then displays the status pop-up box:



5. **IMPORTANT:** If the item belongs to another library **ALWAYS CLICK [No]** at this point! **It is critical that the Lost status remains on the item** so that staff at the owning library will be able to identify and process the item correctly upon its return to the owning location.
6. Attach a note similar to the one in the next illustration with the routing slip and prepare the item for delivery back to the appropriate owning library. *Making your note on a long strip of brightly colored paper that will stick out of the book will help ensure that it is seen.*

DATE: _____

RETURN TO: _____

ITEM RETURNED AT: _____

ITEM STATUS IS "LOST"
ITEM HAS BEEN DISCHARGED

**PLEASE CLEAR REPLACEMENT
FEE FROM UB STUB PATRON RECORD
AND SET LOST COUNTER BACK**

7. The owning library receives the Lost item. The item has been appropriately flagged, so the Operator knows this is an item that has been discharged remotely, but still has the Lost status associated with the item.

IMPORTANT: At this point, workflow may differ according to the Operator's security and/or a library's workflow decisions:

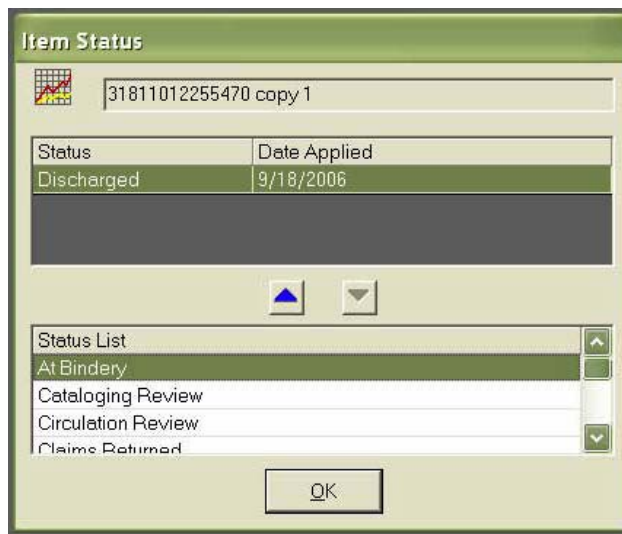
- a. If the Operator has low-level security, **set the item aside** for a Supervisor to process, using the steps below.
 - OR**
 - b. If the Operator has low-level security, discharge the item to remove the "in transit" status and **set the item aside** for Supervisor to process, using steps 8 - 16 or 18 below.
 - c. If the Operator has the appropriate **security to complete the entire process**, follow the steps below to clear the patron record.
8. Discharge the item to remove the in transit status and route the item in at the home library.



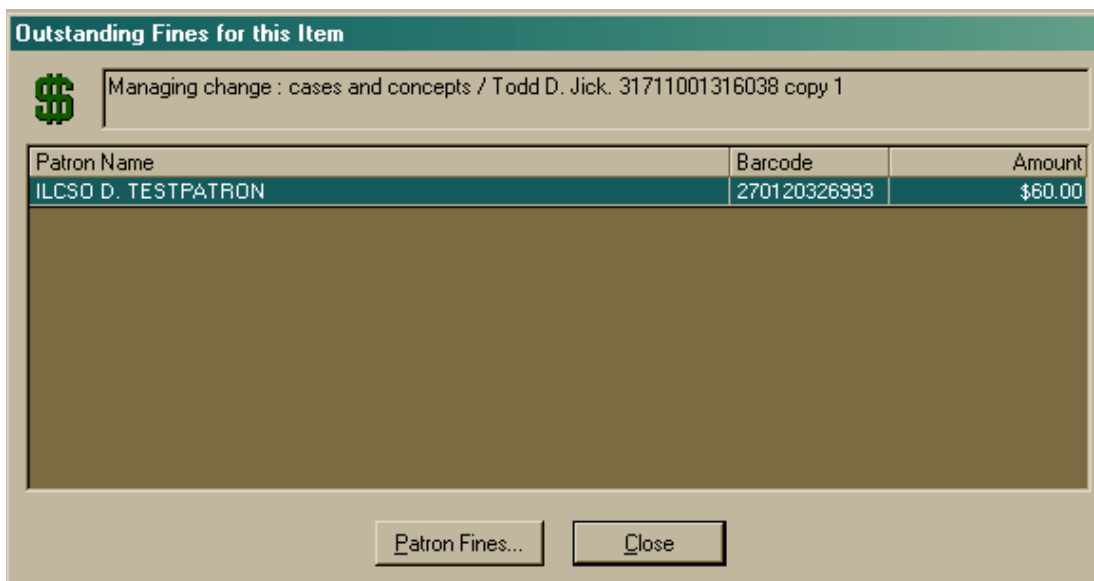
9. In the Circulation module, click on the "Item" icon at the stop of the screen and scan the item's barcode.



10. From the item record screen, click on the line graph icon to open the item status window.



11. With the Lost-System Applied line highlighted, click on the red down arrow to remove the Lost status.
12. Click [OK].
13. Select "Item/Outstanding Fines" from the top screen menu bar to bring up the Outstanding Fines for this item screen. If there is more than one fine listed, select (highlight) the appropriate patron and click on [Close]. **Note: Libraries that do not want to see the full patron record and that do not decrement lost item counters may choose to click on [patron fines] and skip steps 15 & 16 and steps 19 & 20.**



14. Click on the [Close] button.



15. Click on the Patron Icon from the screen top menu and the full patron record will appear.

16. Click on the Fines/Fees icon [\$] in the patron record to bring up the “Patron Fines/Fees” screen.

Patron Fines/Fees						
ILCSD D. TESTPATRON						
Outstanding Fines/Fees				Fines/Fees History		
Date	Title	Barcode	Fee/Posting Type	Fee	Posting	Balance
11/23/2004 04:08 PM	Managing change : cases and concepts / Todd D. Jick.	31711001316038	Oveidue	\$10.00		\$10.00
11/23/2004 04:08 PM	Managing change : cases and concepts / Todd D. Jick.	31711001316038	Lost Item Replacement	\$50.00		\$50.00

Total Due \$60.00

Charge Date: 9/3/2004 01:42 PM Operator:
 Due Date: 10/1/2004 09:00 PM Location:
 Billed:

Buttons: Item Info..., Print, Add..., Pos..., Close

17. Select (highlight) the Lost Item Replacement fine and click [Post...] to bring up the “Post Against Fine/Fee” screen.

18. Forgive the *Selected* amount and click [OK].

You must choose (click in the circle next to) “Selected” if you are not forgiving the total of all fines/fees and choose forgive from the posting type drop down box. Fill in the amount with the amount of the item fine record being cleared.

Post Against: Selected Patron Total

Posting Type:

Amount:

Method:

Description:

Note: At this point workflow may differ according to local library practices. Some libraries do not reset the counter when a lost item is returned.



19. Click the Counters” icon to bring up the “Set Patron Counters” screen.

20. Decrement the Lost Item counter by 1 and click on [OK].

Set Patron Counters

ILCSD D. TESTPATRON

Items Borrowed (historical):

Claims Returned:

Lost Items:

Self-Shelves:

Call Slips Placed (historical):

Short Loans Placed (historical):

Item Distributions (historical):