

SECTION VIII Problem Item Statuses and Workflows.

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A. Definitions of Problem Item statuses

1. *Lost Statuses – when item is checked in the system responds with a pop-up that states “Item was lost, now found”; status is cleared after the pop-up is acknowledged.*

- a. Lost:
 - i. Automatic status change.
 - Items are automatically changed to a Lost status after being overdue for 29 days. Replacement price is automatically applied.
 - ii. Manual status change.
 - Use when patron reports losing item before system automatically converts long overdue item to lost
- b. Claims Returned
 - i. Manual status change only, from the patrons Lost Items list.
 1. Item status must be changed to Lost **first** in order to change the status to Claims Returned.
 - ii. Claims Returned is a Payment status, not an item status.
- c. Trace
 - i. Manual status change only.
 - ii. Use when item is not found in library and is not checked out to a patron.
- d. Missing
 - i. Manual status change only.
 - ii. Some libraries choose to assign this status after an item has been set to Trace for a period of time and they want to remove the item from the Trace reports.

2. *Other Item Statuses – status is cleared upon check-in*

- a. Defect reported
 - i. Manual status change only.
 - Use when patron and/or staff report problem with condition of the item or ability to use the item.
- b. Display
 - i. Manual status change only.
 - Use when items are used in a display and you do not want them to appear on your Holds Queue report
- c. Part Missing
 - i. Manual status change only.
 - Use when part is missing from the item.
- d. AV Repair
 - i. Manual status change only.
 - Used when Owning library has removed the AV item from circulation to

be repaired.

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e. Mending

i. Manual status change only.

- Used when Owning library has removed the item from circulation to be mended.

f. Lost in Transit

i. Manual status change

- Used when item owned by your library has been “in Transit” from one location to another for a long time. Process these items using the Long in Transit report. Different libraries set their items to Lost in Transit based on their local library policies.

g. Missing Inventory:

i. Manual status change.

- Used by libraries to indicate these items were not found during an inventory.

3. ***Damaged Status – status is NOT cleared upon check-in; must be manually removed.***

a. Manual status change only.

- Item is returned/reported damaged by patron and/or staff.

4. ***Withdrawn Status – – status is NOT cleared upon check-in; must be manually removed.***

a. Manual status change; only applied by owning library

- Item chosen by the owning library to be withdrawn from their collection.
- Do NOT use this as a temporary status when you are considering whether to remove an item from your collection. Any items with this status that are not checked out to a patron account will be purged at the end of each month during the “Batch deletion of Withdrawn items” process.

B. Lost status and Workflow

If an item has the status of "Lost" it means the item has become "misplaced" while checked out to a patron. The patron is responsible for payment or replacement of the lost item, unless the owning library chooses to waive that responsibility. The charge for a lost item remains linked to the patron record until the problem is resolved, even if the item is marked withdrawn and/or deleted.

OVERVIEW OF "LOST" STATUS

Whether set manually or automatically, once an item becomes "Lost":

- the item is removed from the list of items checked out by the patron; and
- added to the patron's list of Lost items;
- the patron is credited any estimated/accrued overdue charges; and
- the patron is charged the replacement price for the item.

The lost item remains in the patron's Lost Item list until:

- The item is found and checked in; OR
- The library waives the lost charge and staff manually deletes the item entry from the Lost Item list.
- If the patron pays for the Lost item, DO NOT delete the entry from the patron's Lost Item list until or unless your local library policy determines the patron is no longer eligible for a Refund.

1. Items Checked Out: A checked out item is set to Lost when:

- Overdue items automatically convert to Lost after 29 days overdue.
- Staff manually change the status of an item to Lost as needed. To manually change an item status:
 - Go to the patron's list of checked out items, click on the item barcode to get to the Item Detail screen.
 - Find the Lost Status field.
 - Using the pull-down, change the status to Lost.
 - Click the "Set status" button to the right of the field.
 - The item will be moved from the patron's list of Checked Out items to the patron's list of Lost Items.

2. Lost items at Check In: If an item with the status of Lost is checked in, the pop-up on the Check In screen will say "Not Checked Out, Item was lost, now found".



- a. The system does not explain what kind of lost item was just checked in so you will have to:
- i. Note the patron name or barcode.
 - ii. Click the “Remove from patron’s Lost items” button.
 - iii. Go back to the patron record /Account screen, to see if the patron paid for the item. If the patron has paid for the item, it is the responsibility of the check-in library to fill out a yellow “Lost and Paid Refund” form and send it to the owning library. Refer to [Section VII Fines and Financial Transaction](#), Part J. Refunds for more information
 - iv. When a Lost item is returned, and the item is still in the patron’s Lost Items list,
 1. the patron is automatically credited the replacement price of the item and
 2. charged overdue fines for the actual number of days overdue OR the Max. Accruable fine per issue (for that patron/item), whichever is lower.
- b. If the item is also trapped to fill a hold, a second pop-up message below the “Item was lost...” pop-up will display on the screen.



- i. Click “Confirm Hold and Transfer” to confirm the hold and transfer the item to the next location.
- ii. Do not use the “Print Slip, Transfer and Confirm” button. We use Post-it notes as delivery slips.
- iii. Click the “Ignore” button if there is a part missing or damage to the item. See Part D of this section for instructions on handling Problem Items owned by another library.

- c. If the item does not belong to your library and is not trapped to fill a hold, a second pop-up directing you to send the item back to the owning library will appear.



- i. Click the “Confirm hold and Transfer” button to send the item back to the owning library.
- ii. Do not click the “Keep Here” button. If you do the item will list its “current location” as your library instead of being listed as returning in transit to the owning library.

- d. If the item is owned by your library, there will be no transit pop-up message.

****Always respond to pop-up messages from the top of the screen down.****

C. Claims Returned item status and workflow

A patron may claim that they have already returned an item that is still listed as checked out to them, or is on their record as a lost item.

SCLS ILS policy is that any library that receives a report of "claims returned" by a patron will assign the status of "Claims Returned" to the item, regardless of who owns the item, if the patron has not exceeded 3 claimed returned status changes in the last 12 months.

Once any patron has reached the limit, no library should allow another Lost item to be changed to Claims Returned.

- Check for current Claims Returned items in the patron’s Lost Items tab

- Check for resolved Claims Returned items in the patron's Account History / Payment column.

Home > Patrons > Account for DARLENE DYNIX

DARLENE DYNIX
(2907800899982)
789 SECOND ST #5
TEST PATRON
MADISON WI 00000
608-242-4711
hjolversen@scls.info
Category: Adult (AD)
Home Library: SCLS
Headquarters

Account has net credit.
Balance: \$-4.15
Accruing overdues: \$0.00
Outstanding charges: \$18.80

Account | Account history | Add invoice | Add payment or credit

Fees & payments [Show credit details](#)

No.	Date	Description	Library	Fee type	Amount	Payment	Outstanding
21	03/24/2015	Overdue: JV - Test Item #05, due on 03/05/2015 [barcode: 39078035360651] : JV - Test Item #05	ACL	Overdue Fine	\$10.00		\$10.00
20	03/24/2015	Overdue: JV - Test Item #01, due on 03/05/2015 :	ACL	Overdue Fine	\$1.60		\$1.60
19	03/19/2015	Overdue: JV - Test Item #04, due on 03/05/2015 [barcode: 39078028592278] : JV - Test Item #04	ACL	Overdue Fine	\$1.20		\$1.20
18	03/19/2015	Overdue: JV - Test Item #03, due on 03/05/2015 [barcode: 39078035360404] : JV - Test Item #03	ACL	Overdue Fine	\$1.20		\$1.20
17	03/19/2015	Overdue: JV - Test Item #10, due on 03/05/2015 [barcode: 39078035360875] : JV - Test Item #10	ACL	Overdue Fine	\$1.20		\$1.20
16	03/19/2015	Overdue: JV - Test Item #05, due on 03/05/2015 [barcode: 39078035360305] : JV - Test Item #05	ACL	Overdue Fine	\$1.20		\$1.20
15	03/19/2015	Overdue: JV - Holds #15, due on 03/05/2015 [barcode: 39078035361956] : JV - Holds #15	ACL	Overdue Fine	\$1.20		\$1.20
14	03/19/2015	Overdue: JV - Test Item #06, due on 03/05/2015 [barcode: 39078035360669] : JV - Test Item #06	ACL	Overdue Fine	\$1.20		\$1.20
13	03/04/2015	Lost Item: JV - Holds #24, due on 03/05/2015 [barcode: 39078035360685] : JV - Holds #24	ACL	Lost Item	\$3.99	\$-3.99 Claims Returned (03/04/2015)	\$0.00
12	04/17/2014	Testing SC45213 Pay all. hjo/scls	SCA	Payment	\$-4.92	Reverse	

If a patron claims that they returned an item still listed as checked out to them or in their list of Lost items, first CHECK THE SHELVES AT YOUR LIBRARY. If you don't find the item, fill out the form then modify the Lost item on the patron record.

The library initiating the Claimed Returned process must complete the SCLS ILS Notice of Claims Returned form (blue) and route it to the next appropriate library, with the OWNING library listed LAST.

The initiating library who talks to the patron making the claim has the responsibility to obtain as much information as possible from the patron. Each situation is unique, and the information on the form should explain all pertinent details of the patron's claim.

1. Filling out the form:

- On the top line on the right, enter the date the claim was initiated.
- On the next two lines, enter your library's code and your initials
- Complete the patron information
- Circle the appropriate item barcode prefix and write in the rest of the item barcode.
- Fill in the rest of the item information.
- Fill in the Comments section: record where and when the patron claims to have returned the items, other locations where the item may have been returned.

- g. Route the notice form to a staff member at your library authorized to make a decision about marking the item "Claimed Returned" if you are not able to do so.

SCLS ILS Notice of Claims Returned	
	Date: _____
Patron Barcode #: _____	From: _____
Patron Name: _____	Staff Initials: _____
Item bc (39078 or 39369) _____	
Item Title: _____	
Owning Library: _____	Shelving Location: _____
Call # _____	Collection code: _____
COMMENTS:	
Library where returned: _____	
If more than one, list all others: _____	
When was item returned: _____	
Where was it checked out: _____	
DESIGNATED STAFF	
<input type="checkbox"/> SEARCH ONLY Item NOT marked "Claims Returned"; patron exceeded CR Limit.	
<input type="checkbox"/> Item marked "Claims Returned" in item record.	
SEARCH/ROUTE LIST:	
Verify that the item is still checked out to the patron above. If it is, please search your shelves for this item; it is possible that it was shelved at your library.	
Library: _____	stf initials _____ Item was found*/NOT found** date _____
Library: _____	stf initials _____ Item was found*/NOT found** date _____
Library: _____	stf initials _____ Item was found*/NOT found** date _____
Library: _____	stf initials _____ Item was found*/NOT found** date _____
Library: _____	stf initials _____ Item was found*/NOT found** date _____
*found: CKJ, waive fines, route item, recycle form	
**NOT found: Complete your search information and route form to next library listed; routing of the forms ends at the owning library.	
12/12	

- Authorized staff should check the patron's Account screen for a count of Claimed Returned items, and:
 - If the patron already "Claimed Returned" 3 or more items in the past 12 months, mark the box that says "Search Only. The item will be searched, but will remain on the patron's record as "checked out" or "Lost".
 - If the total of Claimed Returned is less than 3 in the past 12 months, change the

Lost items to "Claimed returned" in the patron's Lost Item List and mark the box on the form.

- In the SEARCH/ROUTE section of the form, list the codes of all the libraries involved, with the OWNING LIBRARY listed LAST. There may be more than one library where the patron thought they returned the item; list them all.
- Route the notice form to the next library involved, in this order:
 - Where the item was claimed to have been returned.
 - Where the item was checked out.
 - The owning library.

2. Converting the item status to Claims Returned:

a. If the item is still in the patron's list of Checked Out items:

- i. click on the item barcode to get to the item detail screen
- ii. Find the Lost status field
- iii. Using the pull-down, change the status to Lost.
- iv. Click the "Set status" button to the right of the field.
- v. Click on Patron's Name
- vi. You will be taken directly to the patron's Lost Items list
- vii. In the Claims Returned column, click the "Make Claims Returned" button for the item.

b. If the item has already converted to Lost it will display in the patron's Lost Items list:

- i. Go to the patron's record.
- ii. Click on the Lost Items tab on the left side of the screen.
- iii. In the Claims Returned column, click the "Make Claims Returned" button for the item.
 1. The item will remain in the patron's Lost Items list with a Claims Returned marker;
 2. The Lost status in the item record will state [Claims Returned];
 3. The Lost item entry in the patron's Account History will waive the Lost item replacement charge and list the payment status of Claims Returned.

3. Searching for the item:

a. Searching libraries:

- i. If your library is NOT the owning library and the item IS found in your library:
 - Check it in and route the item according to CKI message.
 - Waive the fines, if any, and recycle the form.
- ii. If your library is NOT the owning library and the item is NOT found in your library:

1. In the SEARCH/ROUTE section of the form, complete the information for your library: library code, the date searched, your initials, and whether the item was found or not.
 2. Route the form to the next library in the list.
- b. Owning library: Owning libraries receive the Notice form last; they should verify that the item is still checked out to the patron listed on the form and search their own shelves.
- i. If your library IS the owning library and the item IS found in your library:
 - Check it in and route the item according to the CKI message.
 - Waive the fines, if any, and recycle the notice form.
 - Remove any Message on the patron’s Checkout screen that pertains to the Claims Returned item.
 - ii. If your library IS the owning library and the item is NOT found in your library:
 - Follow your library’s procedures for handling the item including filing the notice form.
 - These items will also be listed on one of your Problem Items reports, which are printed in May and November of each year.
 - When your library decides to withdraw this Claims Returned item from the system, remove any Message on the patron’s Checkout screen that pertains to the Claims Returned item.
4. At Check In: If an item with the status of Claims Returned is checked in, the pop-up on the Check In screen will say “Not Checked Out, Item was lost, now found”.



- a. The system does not explain what kind of lost item was just checked in so you will have to:
- i. Note the patron name and barcode.
 - ii. Click the “Remove from patrons Lost items” button.
 - iii. Go to the patron record/Account screen.
 - iv. If the item was Claims Returned, the system will:
 1. change the item status to Available,
 2. modify the message in the Account History screen line entry (Lost, Returned (date)) and

3. charge the patron overdue fines for the actual number of days overdue or the Max. Accruable fines per issue (by patron/item), whichever is lower.
- b. If the item is also trapped to fill a hold, a second pop-up message below the “Item was lost...” pop-up will display on the screen.



- i. Click “Confirm Hold and Transfer” to confirm the hold and transfer the item to the next location.
 - ii. Do not use the “Print Slip, Transfer and Confirm” button. We use Post-it notes as delivery slips.
 - iii. Click the “Ignore” button if there is a part missing or damage to the item. See Parts E and F of this Section for instructions.
- c. If the item does not belong to your library and is not trapped to fill a hold, a second pop-up directing you to send the item back to the owning library will appear.



- i. Click the “Confirm Transfer” button to send the item back to the owning library.
 - ii. If you click the “Keep Here” button, the item will list its “current location” as your library, instead of being listed as in transit back to the owning library.
- d. If the item is owned by your library, there will be no transit pop-up message.

REMINDER: When your library decides to remove any items with a problem status from circulation; remember to clear any related messages off the patron record.

****Always respond to pop-up messages from the top of the screen down.****

D. Problem Items statuses: Defect Reported, Parts Missing and Damaged.

1. Determined the status of a Problem Item
 - a. DEFECT REPORTED - Patron and/or Staff report problem with condition of the item or ability to use the item. Item is not clearly damaged. Use the Damaged/Defect Reported scenarios in Part K of this Section to determine whether to use the Defect Reported or the Damaged workflow.
 - b. PART MISSING – Patron and/or Staff report that one or more parts are missing.
 - c. DAMAGED – Patron and/or Staff report damage to the item.
 - i. If an item is damaged while checked out to a patron, the owning library may want to charge that patron the cost of repairing or replacing it. The amount to charge for the damage is ONLY calculated by the owning library. If you are uncertain about the actual status, or your library does not own the items, use the Damaged/Defect Reported scenarios to help you decide whether to use the Defect Reported or the Damaged workflow.

2. How was the problem reported?:
 - a. **Problem discovered before the item is checked out to a new patron; Circ status is other than “Checked out.”** For example, if the patron takes the item off your library shelf and brings it to desk, or staff notices a disc missing before checking out an item on hold for a patron.
 - i. For parts missing items, follow the Part Missing workflow.
 - ii. For possibly damaged items, follow the Damaged workflow.
 - b. **Problem discovered after the item has been checked out to a new patron (item Circ status is “Checked out”), patron reports problem in person.**
 - i. When you have item in hand, judge the condition of the item, and use the most appropriate status and workflow to report the issue.
 - c. **Problem discovered after the item has been checked out to new patron (item Circ status is “Checked out”), Patron reports problem by phone.**
 - i. **OPTIONAL:** Add a note to the current patron’s CheckOut screen stating that the patron called to report the problem.
 - ii. While you are talking to the patron, emphasize the preferred method of return is to **bring the item to circulation desk. If they must return it in the book drop, instruct patron to attach a note describing the problem.**
 - iii. When item is actually returned and you have it in hand, judge the condition of the item, and use the most appropriate status and workflow to report the issue.

3. If it is your item, you can choose to complete the Problem Item form as a record to keep with the item.
4. **When the item belongs to another library, you must complete the Problem Item form.**

5. REMINDER: When your library decides to remove any items with a problem status from circulation; remember to clear any related messages off the patron record.

E. Filling out the Problem Item form

1. **DO NOT CHECK IN THE ITEM** (until or unless instructed in the procedure)

ROUTE TO:	Problem Item Form DO NOT CHECK IN THE ITEM!!!!	Date: _____ From: _____ Staff Name: _____
<input type="checkbox"/> Damaged Item (DI) <input type="checkbox"/> Part Missing (PM) <input type="checkbox"/> Defect reported	Details (please be specific):	
Enter barcode in a "Search the Catalog" field and record the following: Title: _____ Item Barcode # _____ Find Circ status, click on patron name and record the following: Name: _____ Patron Barcode #: _____ Phone #: _____		
Problem identified and/or reported by: <input type="checkbox"/> Staff <input type="checkbox"/> Patron Item received via: <input type="checkbox"/> Counter/Book Drop <input type="checkbox"/> Transit Return <input type="checkbox"/> Transit Hold <input type="checkbox"/> Checked in by sorter		
Problem Item Procedures		
DI or PM via Counter/Book Drop or Transit Return DO NOT CHECK ITEM IN! 1. Add a Damaged OR Parts Missing message to patron's Checkout screen. 2. If parts missing, contact patron and retain item for 3 days, then proceed to step 3. 3. Route item and form to owning library for follow up, or follow local library procedure.	DI or PM via Transit Hold DO NOT CHECK ITEM IN! 1. Go into Item record and select Edit Holds 2. Change patron's hold priority from In Transit to 1, and click Update Holds . 3. Change Other Item Status on item screen to Defect Reported . 4. Route item and form to owning library for follow-up, or follow local library procedure.	Defect Reported 1. After filling out the above information, check item in. 2. If a hold is activated, click Ignore . 3. Change Other Item Status to Defect Reported 4. Route item with form to owning library, or follow local library procedure.
Optional: Collection Code: _____ Holds: _____ Copies: _____ Use: _____		
Patron contacted on _____ by _____ via phone/email/letter/voice message		

2. Fill in the "Route to" box with the 3 letter code for the owning library.
3. Fill in the "From, Date, Staff name" section for your library.

4. Under the "Route to:" box, select the Problem Item status you are reporting for this item.
5. In the "Details" section, record the specific problem(s) reported by staff or a patron.
 - a. Record the item title and barcode on the form.
 - b. Access the item record in Koha.
 - c. Click on the patron barcode in the "Circ Status" field. Record the (current) Patron Barcode #, patron name and phone # in the appropriate fields on the form.
 - d. Record who reported the problem; Staff or Patron.
 - e. Select the manner in which the item was received at your library.
 - f. In the Problem Item procedures section, follow the workflow for the problem item status you selected in Step 5. [DI=Damaged Items; PM=Part Missing]
 - i. DI or PM via Counter/Book drop or Transit return [DO NOT CHECK ITEM IN]:
 1. Add a Damaged or parts missing message to the (current) patron's Check Out screen.
 2. If parts missing, contact current patron and retain item for 3 days, then proceed to step 3.
 3. Route item and form to owning library for follow up, or follow local library procedures.
 - ii. DI or PM via Transit Hold [DO NOT CHECK ITEM IN]:
 1. Go into Item record, click Edit Holds tab on left screen.
 2. Change (your) patron's Hold Priority from "In Transit" to "1"; confirm the action in the pop-up box, then click Update Holds button.
 3. Change (item's) Other Item Status to "Defect Reported".
 4. Route item and form to owning library for follow up, or follow local library procedures.
 - iii. Defect Reported:
 1. After filling out the item and patron information on the Problem Item form. Check the item in.
 2. If a hold is activated, click the "Ignore" button on the pop-up.
 3. Click on the item barcode to access the Item Detail screen.
 4. Change the Other Item Status to "Defect Reported" and click the Set Status button.
 5. Route item and form to owning library or follow local library procedure.
 - g. The Optional line under the Problem Item Procedures grid can be used by libraries to record information before assessing whether or not to replace the item.
 - h. If the patron was contacted, record when and by which staff person (at which library) on the last line at the bottom of the form. Circle the means used to communicate with the patron.

6. Attach the COMPLETED form to the item, including any screen prints.
7. In the case of items returned by the patron, in such condition that they may pose a health hazard:
 1. Call the owning library:
 - a. Verify the replacement charge for the item.
 - b. Ask if they want the damaged item sent with the payment or if the receiving library may dispose of the item.
 2. Accept the payment from the patron.
 3. Add a note on the damaged item form indicating that that the call took place between the libraries, the decided action and record contact names for both owning and receiving libraries.

F. Trace status and Workflow

Trace is an Other Item status assigned to an item that has been misplaced, but was NOT checked out to a patron at the time.

Items can be manually changed to Trace by:

- Selecting the Trace option in the Action column of the Holds Queue report. This is the preferred method if the item is on the Holds Queue report.
- Changing the item's "Other Item Status" to Trace in the item record. Use this method when the item cannot be found in library, is not on the Holds Queue report and is not checked out to a patron.

A generic [Trace report workflow](#) is posted on the ILS Support Report webpage to help libraries create their own workflow.

G. AV Repair and Mending statuses

AV Repair is used when the owning library has removed the AV item from circulation to be repaired.

Manual status change.

- Check in the item.
- If trapped for a hold, click Ignore.
- Change the "Other Item Status" to AV Repair in the item record.

Mending is used when the owning library has removed the item from circulation to be mended.

Manual status change.

- Check in the item.
- If trapped for a hold, click Ignore.
- Change the "Other Item Status" to Mending in the item record.

Libraries should continue to follow their own, internal procedures for marking items AV Repair

or Mending.

H. Withdrawn status and Workflow

Libraries mark items Withdrawn when they are removing the item from circulation to be discarded.

Manual status change.

- Libraries should continue to follow their own, internal procedures for marking items Withdrawn.
- If an item is on your Holds Queue report and your library makes the decision to mark the item Withdrawn, you **MUST mark the item Trace FIRST** to remove it from the report. If you don't, the hold request will remain on your Holds Queue report.

I. Problem Item reports

Problem Item reports allow each library to keep track of all items that have problem item statuses and to take appropriate action on these items, such as deleting the holdings, etc, according to local policy.

Problem item reports are run different schedules, based on the items' status. Reports are posted on the SCLS ILS Support site, [Reports page](#) see the [Reports Calendar](#) for specific dates and reports.

More information about these types of report, when they are run and the workflows for cleaning them up is in [Section XII Circulation and Statistical reports](#), Part C Problem Item reports.

J. Fines and charges on Lost and Claims Returned items

Lost items, not paid for that are returned/checked in using Normal Check in will credit the replacement price on the patron's record and charge the patron overdue fines for the actual number of days the item was overdue OR the Max. Accruable fines per Issue, whichever is lower.

Lost items, that have been paid for (and are still on the patron's Lost Items list) that are returned/checked in using Normal Check in will credit the Amount Paid on the patron's record and create an Unallocated Credit / Refund on the patron's Account screen. The patron will also be charged overdue fines for the actual number of days the item was overdue OR the Max. Accruable fines per Issue, whichever is lower.

Claims Returned items that are returned/checked in using Normal Check In will charge the patron overdue fines for the actual number of days the item was overdue OR the Max. Accruable fines per Issue, whichever is lower.

If a Lost or Claims Returned items is returned/checked in using the Forgive overdue charges check in option, the patron will not be charged overdue fines.

See [Section VII Fines and Financial Transactions](#) of this Circulation Manual for additional

information.

K. Damaged/Defect Reported scenarios

Use these examples and scenarios as a guide to help your staff choose the most accurate problem item status when reporting a problem. Assess the problem by asking some questions:

1. Did the patron or a staff person report the problem?
2. Was it the patron's fault and would we typically charge for it?
3. How was item received (returned by patron, in book drop with no note, in a delivery bin)?

Possible DEFECT REPORTED scenarios (not the current patron's fault, it was like that at cko, it is something we would typically not charge for) Most of the time, the patron tells us about the problem. Examples of DEFECT REPORTED problems:

- binding is loose on a book/pages are falling out.
- patron reports that the sound is garbled on the cassette and it was like that when they got it.
- patron reports that the movie doesn't play.
- CD/DVD lid has a tab or hub broken and it doesn't close well or stay closed (libraries may consider this normal wear and tear and therefore do not charge for this).
- patron reports that CD/DVD skips.

Possible DAMAGED scenarios (the damage happened while they had it and/or it was their fault and we would typically charge for it) Sometimes the patron reports the problem. Examples of DAMAGE problems:

- Patron reports that they accidently dropped book in tub.
- Book is found in bookdrop with chew marks.
- DVD disc is found to be cracked.
- Book binding is broken and there are tire marks across the pages of the book.
- Book is found in return bin with stained pages.

The examples are not all inclusive and your library may have a local policy about what you assess as Defect Reported or Damaged than other libraries.

HOW was the item received?

- Patron returns item in person to staff stating there is a problem.
 - If item belongs to another library and patron admits to causing problem fill out the **Damaged** form.
 - If item belongs to another library and patron states they did not cause problem fill out **Defect Reported** form.
 - If item belongs to your LIB follow your in-library procedure.
- Item returned in book drop with a note.
 - If item belongs to another library and patron admits to damage, fill out the **Damaged** form.

- If item belongs to another library and patron states they did not cause problem fill out **Defect Reported** form and attach patron's note.
- If item belongs to your LIB follow your in-library procedure.
- Item returned in book drop without a note.
 - If the item belongs to another library fill out the **Damaged** form.
 - If item belongs to your LIB follow your in-library procedure.
- Came in transit (red bucket) to fill a hold.
 - Fill out the **Damaged** form and re-queue the hold for the patron. If this is the only copy of the item add a note to the patron's record letting them know there is a problem with the only copy of the item.
- Your LIB item coming "home" (red bucket).
 - Follow your in-library procedure.
- Patron calls to report damage.
 - Follow your in-library procedure.
 - Some libraries record the date/time of the phone call in the patron's record.
- Item brought up to desk before checking out to state there is a problem.
 - If the item belongs to another library (on hold shelf) fill out the **Defect Reported** form and re-queue the patron for another copy. If this is the only copy of the item inform the patron.
 - If the item belongs to your LIB ask patron if they would like us to get a copy from another library, place our item on mending, and place on the proper "damaged shelf". If this is the only copy of the item inform the patron.

L. Recording Item Condition Issues: guidelines

Overview of problem:

1. Libraries have different opinions / levels at which they determine that damage to an item is severe enough to remove it from circulation.
2. Libraries are receiving materials from other libraries to fill holds that they 1) perceive as damaged 2) do not want their patrons to be charged for that damage and 3) have not been mended or noted by the owning library.
3. Libraries need a set of common guidelines to help determine the difference between normal wear and tear and damage.
4. Libraries also need a standard way to acknowledge and record minor defects or damages, on both the physical items and in the computer record, and confirm that they are willing to continue to circulate an item with the minor defects or damages.

Staff need to be reminded and re-trained to check the physical condition of items before

- checking out to the patrons,
- filling holds from the Holds Queue (pick list) report,
- checking items in – both at the desk and from the delivery bins, and
- returning items to the shelf.

When the item is owned by your library and you are pulling items from the shelf to fill holds requests on your Holds Queue report, review the condition of the item before you send it out to fill a hold. If an item needs repair, is grungy, dirty, liquid damaged or falling apart, do you really want to fill the hold with that item? The items that we send out to patrons are a representation of a library in the hands of the patron –do we want to send out something that the receiving library will have to send back, for fear that their patrons will be charged? Or that will fall apart in the patron’s hands?

To answer number 4 above, the CSC presents these guidelines as “a standard way to acknowledge and record minor defects or damages, on both the physical items and in the computer record, and confirm that they are willing to continue to circulate an item with the minor defects or damages.”

At Check Out (item **owned by your library**): If you are checking out an item to a patron and you note that it has a defect or damage and *you are willing to allow the item to continue to circulate*, you should record that information on the physical item and , optionally, in the Public Note field of the Item record and/or in a Check In note.

For a book:

1. REQUIRED. Physical item: Add a message on the flyleaf (first page) in a book:
“8/15/2014 Water damage noted. Ok to circulate. RT/LIB”
2. OPTIONAL. Koha Item record: Search the item barcode and go to the Item Detail screen. Is there information in the Public Note field? If no, record the damage/defect and include the date and your initials/lib in the Public note field. “Oil stain all over page 45. 9/9/2014. mr/FFLY”. THIS NOTE WILL DISPLAY IN THE PAC.

Recommendations for adding a note to items with other physical formats:

- DVDs or CDs -little label on the item (inside the case, inside the plastic sleeve, content label, on insert or hub) indicating the problem: cracked hub, scratches but still plays, discoloration, etc.
- Magnetic tape items (Cassettes and VHS tapes)–little label on outside of case indicating defective but still plays

- Digital Audio Players—usually a problem with the case but put little label on outside of case indicating defective but still plays.
- Kits—for books put note on flyleaf (if possible) and little label on the media item (DVD, CD or cassette tape). Some libraries provide contents tag and put the note there.
- Software little label on the item (inside the case, inside the plastic sleeve, content label, on insert or hub) indicating the problem: cracked hub, scratches but still plays, discoloration, etc.

Hold Queue report (item owned by your library): If you are pulling an item from your shelf that has a defect or is damaged and *you are willing to allow the item to continue to circulate*, please record that information in the physical item and, optionally, in a Check In note for the item. For a book,

1. REQUIRED. Physical item: Add a message on the flyleaf (first page) in a book:
“8/15/2014 Water damage noted. Ok to circulate. RT/LIB”
2. OPTIONAL. Koha Item record: Search the item barcode and go to the Item Detail screen. Is there information in the Public Note field? If no, record the damage/defect and include the date and your initials/lib in the Public note field. “ Oil stain all over page 45. 9/9/2014. mr/FFLY.” THIS NOTE WILL DISPLAY IN THE PAC.

Shelving an item (item owned by your library): If you are re-shelving item from your shelf that has a defect or damage and *you are willing to allow the item to continue to circulate*, please record that information in the physical item and, optionally, in a Check In note for the item. For a book,

1. REQUIRED. Physical item: Add a message on the flyleaf (first page) in a book:
“8/15/2014 Water damage noted. Ok to circulate. RT/LIB”
2. OPTIONAL. Koha Item record: Search the item barcode and go to the Item Detail screen. Is there information in the Public Note field? If no, record the damage/defect and include the date and your initials/lib in the Public note field. “Oil stain all over page 45. 9/9/2014. mr/FFLY.” THIS NOTE WILL DISPLAY IN THE PAC.

Delivery bin (item not owned by your library): If you have received the item at your library to fill a hold and the item has minor physical damage or a defect, check for a note recording the damage or defect.

1. Physical item: Check the flyleaf for a record of the damage/defect. If there is none, check the Koha Item record.
2. Koha Item record: Search the item barcode and go to the Item Detail screen. Is there information in the Public Note field?
3. If there is no Note in the physical item and no Public note in the Item record, you need to decide if you are willing to circulate the item to your patron (and take the chance

they may be charged for the damage/defect). If you have the time, contact the owning library and ask if it is okay to circulate the item with the damage/defect noted AND record the damage in the front of the book. If you are not going to fill your patron's hold with the item, re-queue the patron's hold, follow the correct Problem Item procedure, fill out the appropriate form and send the item to the owning library. (It is the responsibility of the owning library to note or repair their items before resending the item to fill a hold).

4. If the item is the only available copy in the system and the defect is only minor, contact the owning library to receive input on whether they will allow you to circulate the item to your patron in the current condition so that the patron does not have to wait longer than necessary.
 - a. Ask if you can mark the item for the library, or
 - b. Place an item-level hold with staff card to trap the item when it is returned or,
 - c. Put a post it note, with a date, in the item indicating that the item needs to go back to the owning library for review.

Check In (item not owned by your library):

If an item is returned at your library and the item has minor physical damage or a defect, check for a note recording the damage or defect.

1. Physical item: Check the flyleaf for a record of the damage/defect. If there is none, check the Koha Item record.
2. Koha Item record: Search the item barcode and go to the Item Detail screen. Is there information in the Public Note field?
3. If there is no Note in the physical item and there are no notes in the Item record, you should follow the correct Problem Item procedure, fill out the appropriate form and send the item to the owning library. (It is the responsibility of the owning library to note damage/defects and repair their items before resending them out to fill holds).

M. [How to Handle Damaged items from other libraries that arrive to fill holds.](#)

Policy: [HANDLING DAMAGED ITEMS FROM OTHER LIBRARIES THAT ARRIVE TO FILL HOLDS](#): It is the owning library's responsibility to note damage on the item or repair the item before it is sent out or when it is returned with a Damaged form.

Procedure:

- A. When you have received a damaged item to fill a hold and there are multiple copies of the item in the system.
 1. Fill out the Problem Item form

2. Go into the item record, click on 'Edit Holds' tab on the left screen.
 3. Change patron's hold priority from In Transit to 1 and click the Update Holds button. Click OK when you are asked to confirm this action.
 4. In the Item Detail screen, change the item's Other item status to Defect Reported.
 5. Route item and form to the Owning library.
- B. When you have received a damaged item to fill a hold and it is the only copy of the item in the system.
1. If the item is so damaged that it shouldn't circulate, missing pages for example, follow the steps in Part A
 2. If the item is damaged and there is any previous borrower history, follow the steps in Part A and contact the owning library for instructions
 3. If the item is damaged, there is no previous borrower history and you still want to check it out to your patron because it is the only copy, contact the Owning library. The Owning library may:
 - i. Give you permission to note the damage on the item and circulate the item.
 1. If yes, put a hold on the item to capture it when returned in order to return it to the Owning library.
 - ii. Request that you return the item to them without circulating the item to your patron. Follow the steps in Part A and then offer to request the item for the patron via OLL.