

CARL Conversations: April 15th, 2021

Topic: Damaged Items Billing (GoLost and Manual Fines)

Question and Answer Session

1. If an item is overdue and returned, does it generate a fine at the same time?

If an item is overdue and returned, it would just calculate the overdue fees. If the item was overdue and marked as Lost (without being paid), then returned, only the total overdue fines would show. It is set up in CARL to assess overdue fines for Lost items once they are returned.

2. If an item is marked Lost, does a library have to then mark the item as withdrawn?

No, you don't need to. It depends on how you want it to look in the OPAC. If you mark it as Withdrawn, it won't show in the OPAC. But if you leave it as Lost, it will show as Lost in the OPAC. The patron will see it as Lost on their end.

3. Can we generate a report of our Lost items and then either delete or withdraw them?

Yes. You can use report 17 – Items by Status or you can use report 20 – Lost Items. Then you can go through and delete or withdraw these as needed.

4. If damage is found after an item is checked in, and want to charge the patron, would we put this in as a Manual Fine?

Yes. If it's damaged but the item can still be circ'd, such as torn page, or marked up, then staff can add on the Manual Fine for the amount they choose. If the item is damaged to where it can't be circ'd, then staff will want to check the item back out to the patron, mark this as Go Lost, Pay Later, and fill out the Billing template to send out to the patron.

5. If a damaged item is accidentally checked in, but needs to go to the owning library for review, what should we do?

Check the item back out to the patron and send to the owning library. If a hold was accidentally triggered, please cancel that hold, not filling the next if there is one, and replace the hold.

6. If an item is Lost and then found, how would staff update that status. Does it update itself once it's checked back in?

If the item is marked Lost and the patron hasn't paid yet, then once it is checked in the system will update this item to Available, Hold, or In Transit. If the item is Lost and Paid, it would depend on whether the item was deleted from the system. If the item was deleted, the system won't recognize the barcode and the item will need to be added back. If the item status was updated to Withdrawn after being Lost and Paid, and then returned, the system will check the item in and update the status to Available, or In Transit.

7. If we are sending a damaged item back to the owning library to let them decide if the damage is billable, why are we changing the status of the item at all?

OWLS would like staff to keep the item checked out to the patron if it is getting sent to the owning library for review. The status won't change until the owning library does something to the record.

8. What is the best option for marking items as Damaged: Go Lost or Manual Fine?

After discussion, it has been determined that the Go Lost function is preferable for marking items as Damaged if the item is no longer circ'able in CARL. Use the Billing template to create a bill for the patron. If the item is still circ'able, you can add a Manual Fine for the amount you want to charge.

9. Can patrons see a description of their fines or Lost items?

Patrons can see in their account if an item is Lost, but they cannot see a description of any Manual Fines or Special Fees added to their account. OWLS can open a ticket with TLC and ask for an enhancement for Manual Fines and Special Fees to show more detail from the patron side.

10. Can we get a predefined note for damaged items?

Yes. OWLS has already added a predefined note in CARL for "Damaged." After discussion from the group, OWLS will update this to fit the needs of the system. Adding "Damaged - In transit for review" was an option that came up and the group liked. OWLS will come up with a second predefined note for those items that are going back to the library for the patron to keep.

11. Is it okay to just send a yellow problem slip with a damaged item to the owning library? How should we process/send damaged items?

Yes. You should still be including the Yellow Problem Slip on items that are going back to the owning library for review. Staff should also make sure to add the predefined "Damaged" note to the item record.

12. Why does the patron's home agency mark damaged items as Go Lost, according to the proposed recommendation from OWLS on how to process other library's damaged items? Why can't the owning library mark it as Lost once they've reviewed the item?

If the library circulating the item does not own the item, they should not mark it as Lost unless they've contacted the owning library and received permission to do so. We want the owning library to mark the item as Lost. OWLS will work on writing up another workflow and share it with the group.

13. If you add a Manual Fine with an item number attached to it, the reason will show up in the patron account, right?

No. Any kind of Manual Fine added will only show as that on the patron side. Special Fees also only show up as such. No more information is given to the patron as to what the fine/fee is for. OWLS will open a ticket with TLC to see if they can add any more details to those fines/fees for patrons to see.

14. Can TLC change the Go Lost button to say Go Billed instead? That would make things a lot easier from the staff side when it comes to Lost and Damaged items.

OWLS will open a ticket with TC to see if this can be done.

15. If TLC can change the Go Lost button to say Go Billed and staff use this, will the added note say "Billed" then?

OWLS will verify this when they open a ticket with TLC. At this time, OWLS isn't sure how/if changing the language of the button will change the backend functionality.

16. Is there a way to get a training manual with scenarios listed and how to handle them? Videos are great but a manual is nice, too.

OWLS can put together what they have. If there are specific scenarios that you'd like included in a training booklet, let OWLS know.

17. Are prices in records always correct? Especially for when marking items as Damaged or Lost and charging a patron?

No, they aren't. Always contact the owning library first so the price can be verified.

18. Is there a place that we can all put all documentation that we all have been putting together individually so that we can share our resources?

OWLS will double check with Evan and see if there can be a folder made on SharePoint so everyone can add their documentation.