

Claiming

All claiming is currently manual.

Evergreen uses the default claiming policies, set for each provider, to compile a claim-ready list of items based on order date. This list can aid staff when claiming items. Staff can use Evergreen to track items that have been manually claimed.

Claim policies specify the reason for a claim, the length of time a user should wait to claim, and the specific action(s) that users should take to claim items. The policy is set for each item when a provider is specified in the purchase order creation process.

View the Current Claim Policy for an Item

The default claim policy associated with each provider is automatically assigned to line items and copies purchased from the provider.

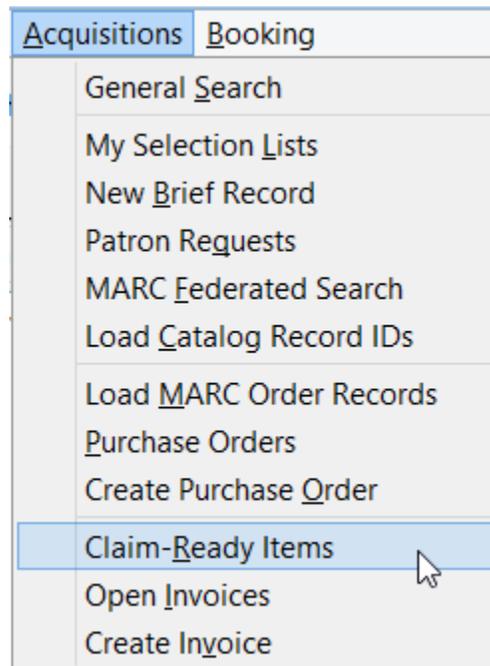
Line Items	Expand All	Items	Notes	Actions	Status	Estimated Price
 Oh, the places you'll go! / by Dr. Seuss. Seuss, 9780679905271 c1990. Random House,	Expand	Copies(2)	Notes(2)	-- Actions --	On-Order	8.95
# 8195 → catalog ↻ worksheet # 306 requests view invoice(s) claim policy: Damaged Replace BROff						

Claim Ready Items

Batch Claiming of Claim-Ready Items

Evergreen can produce a list of items, by ordering branch, which are ready to be claimed. You can use this list to manually claim items from your provider without having to open the purchase orders. Entire line items can be manually claimed through the claim-ready list.

1. Select *Acquisitions* → *Claim-Ready Items*.



2. If your library system has branches, choose a branch from the drop down menu to claim items to be received by that branch.

Items Eligible For Claiming

Show items ready to claim for:

<input type="checkbox"/>	Items
<input type="checkbox"/>	<p>One wish / Linda Lael Miller., by Miller, Linda Lael. (9780671537869) 2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed Estimated \$29.02, Encumbered \$0.00, Paid \$29.02 # 710 ≡ 62 8/24/15 ✚ ViewPlaceOrdersPOtest [Consider individual copies for claiming]</p>
<input type="checkbox"/>	<p>The History of PINES, by Staff, GPLS (1254893576125) 2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed Estimated \$25.98, Encumbered \$0.00, Paid \$12.99 # 9515 ≡ 314 8/6/15 [Consider individual copies for claiming]</p>

3. Any items that meet the conditions for claiming will appear. Any items being claimed with the same claim type (claim reason) can be claimed at the same time.

4. Check the box(es) adjacent to the line item(s) you wish to claim.

5. Click *Claim selected line items*.

6. From the *Claim Type* drop down menu, select the reason you are making the claim.

	[Consider individual copies for claiming]
<input checked="" type="checkbox"/>	<p>The History of PINES, by Staff, GPLS (1254893576125) 2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed Estimated \$25.98, Encumbered \$0.00, Paid \$12.99 # 9515 æ 314 8/6/15 [Consider individual copies for claiming]</p>
Claim selected items	
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Claim type: <input type="text" value=""/> Note: <input type="text"/> <input type="button" value="Claim"/></p> <ul style="list-style-type: none"> BO Damaged NR MIS </div>	

7. Enter a note if you like and click *Claim*.

8. Claim vouchers for the claimed items will appear. Click *Print* to print out your vouchers. The voucher can be mailed to the provider to initiate the claim.

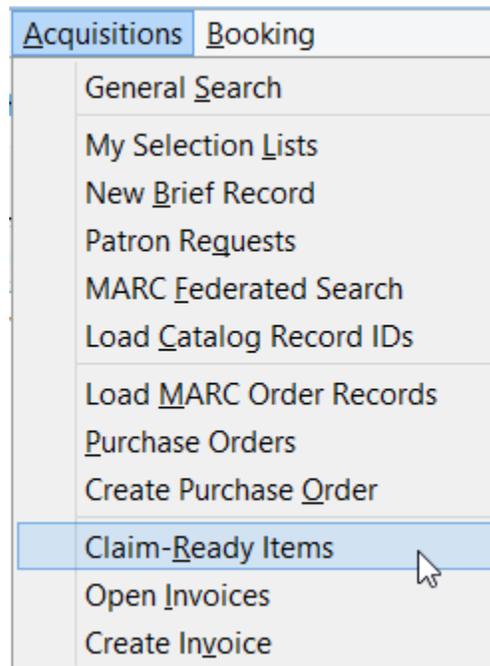
Claim: 17 (NR)

Against: One wish / Linda Lael Miller.

- Event type: EMAIL (Library initiated)
 Event date: 2015-09-10T15:35:13-0400
 Order date: 2015-08-24T17:16:27-0400
 Expected receive date:
 Initiated by: admin. gpls acq
 Barcode: ; Fund: PLSTA (2013)

Copy Claiming of Claim-Ready Items

Individual copies on a line item can be claimed through the claim-ready list.



1. Click *Acquisitions*→*Claim Ready Items*.
2. If your library system has branches, choose a branch from the drop down menu to claim items to be received by that branch.
3. Any items that meet the conditions for claiming will appear.
4. Click the line item title link for the title of the item you would like to claim a specific copy of.

Items Eligible For Claiming

Show items ready to claim for:

<input type="checkbox"/>	Items
<input type="checkbox"/>	<p>One wish / Linda Lael Miller., by Miller, Linda Lael. (9780671537869) 2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed Estimated \$29.02, Encumbered \$0.00, Paid \$29.02 # 710 ≡ 62 8/24/15 ✦ ViewPlaceOrdersPOtest [Consider individual copies for claiming]</p>
<input type="checkbox"/>	<p>The History of PINES, by Staff, GPLS (1254893576125) 2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed Estimated \$25.98, Encumbered \$0.00, Paid \$12.99 # 9515 ≡ 314 8/6/15 [Consider individual copies for claiming]</p>

5. Click the *Title* link of the copy you wish to claim.

Line Items Expand All Items Notes Actions Status Estimated Price

One wish / Linda Lael Miller.
 Miller, Linda Lael. 9780671537869 c2000. Pocket Star Books, native-evergreen-catalog
 Order Identifier ISBN 9780671537869 Expand Copies(1) Notes(0) Claims (0 existing) On-Order 2.50

20946 | [catalog](#) | [worksheet](#) | [requests](#) | [view invoice\(s\)](#) | claim policy: Damaged Replace

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
STATELIB-L	ACQGPLS30776	ACQGPLS30776	PLSTA-L (2015)	On Order	book		

-- Actions --
 Update Barcodes
 Holdings Maint
Claims (0 existing)
 View History

6. A Claims box appears; use the check boxes to select the copies you wish to claim and then click *Claim selected*.

Line Items

One wish / Linda Lael Miller.
 Miller, Linda Lael. 9780671537869 c2000. Pocket Star Books, native-evergreen-catalog
 Order Identifier ISBN 9780671537869 Expand Copies(1) Notes(0) Claims (0 existing) On-Order 2.50

20946 | [catalog](#) | [worksheet](#) | [requests](#) | [view invoice\(s\)](#) | claim policy: Damaged Replace

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
STATELIB-L	ACQGPLS30776	ACQGPLS30776	PLSTA-L (2015)	On Order	book		

Claims
 Against item: One wish / Linda Lael Miller. (20946)
 Initiate New Claims
 ACQGPLS30776 / Not rec'd

Claim selected

Direct Charges, Taxes, Fees, etc.
 There are no miscellanea attached to this purchase order.

7. From the Claim Type drop down menu, select the reason you are making the claim.

Claim type: BO Note: **Claim**

BO
 Damaged
 NR
 MIS

8. Enter a note if you desire and click *Claim*.

9. Claim vouchers for the claimed items will appear. Click OK to print out your vouchers.

10. These vouchers can be mailed to the provider to initiate claims.

11. To see copies that have been claimed, click on the copies link for the line item OR click on Claims History in the Action area.

One wish / Linda Lael Miller., by Miller, Linda Lael. (9780671537869)
 1 Ordered, 0 Received, 0 Invoiced, **1 Claimed**, 0 Cancelled, 0 Delayed
 Estimated \$2.50, Encumbered \$2.50, Paid \$0.00
 # 20946 [493 10/29/15](#)

Claiming through a Purchase Order

Line Items and individual copies can be claimed at any time after being ordered until received. Line items that have been suspended can be claimed.

Claim a Line Item or Copy

1. Open a purchase order.
2. Using the *Actions* menu on the line item, select *Actions*→*Claims (0 existing)*.

The screenshot shows a library system interface with a table of line items. The first row is highlighted in pink and contains the following information:

- Line Item:** One wish / Linda Lael Miller.
- Order Identifier:** ISBN 9780671537869
- Status:** On-Order
- Estimated Price:** 2.50

The 'Actions' menu is open, showing the following options:

- Claims (0 existing)
- Actions --
- Update Barcodes
- Holdings Maint
- Claims (0 existing) (highlighted with a red circle)
- View History

Below the line item table, there is a table with the following columns: Branch, Barcode, Call Number, Fund, Copy Location, Circ Modifier, Collection Code, Note.

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
STATELIB-L	ACQGPLS30776	ACQGPLS30776	PLSTA-L (2015)	On Order	book		

3. Check the boxes next to the cop(ies) you wish to claim and click *Claim selected*.

The screenshot shows a dialog box titled "Claim selected items". It contains the following information:

- Item:** The History of PINES, by Staff, GPLS (1254893576125)
- Status:** 2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed
- Estimated Price:** \$25.98, Encumbered \$0.00, Paid \$12.99
- Item ID:** # 9515 # 314 8/6/15

Below the item information, there is a "Claim selected items" button. Below that, there is a "Claim type" dropdown menu with the following options:

- BO
- Damaged
- NR
- MIS

There is also a "Note:" text input field and a "Claim" button.

4. From the *Claim Type* drop down menu, select the reason you are making the claim.
5. Enter a note if you desire and click *Claim*. The number of existing claims on the line item updates and a claim voucher appear. (BUG: The voucher appears inconsistently.) The voucher can be printed and mailed to the provider to initiate the claim.
6. Once again use the *Actions* menu on the line item; select *Actions* → *Claims (X existing)*.

Line Items	Expand All	Items	Notes	Actions	Status	Estimated Price
 One wish / Linda Lael Miller. Miller, Linda Lael. 9780671537869 c2000. Pocket Star Books, native-evergreen-catalog Order Identifier ISBN 9780671537869 # 20946 → catalog ↻ worksheet requests view invoice(s) claim policy: Damaged Replace	Expand	Copies(1)	Notes(0)	Claims (1 existing) ▾ -- Actions -- Update Barcodes Holdings Maint. Claims (1 existing) View History	On-Order	2.50

7. The claimed items will appear in the top half of the pop-up with a link to their associated vouchers.

Claims
Against item: One wish / Linda Lael Miller. (20946)

- ACQGPLS30776 / Not recv'd
 - NR [Show Voucher](#)

Initiate New Claims

ACQGPLS30776 / Not recv'd

Claim Vouchers

Claim vouchers can be printed and mailed to providers to initiate claims. These vouchers can be printed at the time of the manual claim in the system or reprinted at a later time through the copies link.

Claim vouchers contain the following information:



Claim: 17 (NR)

Against: One wish / Linda Lael Miller.

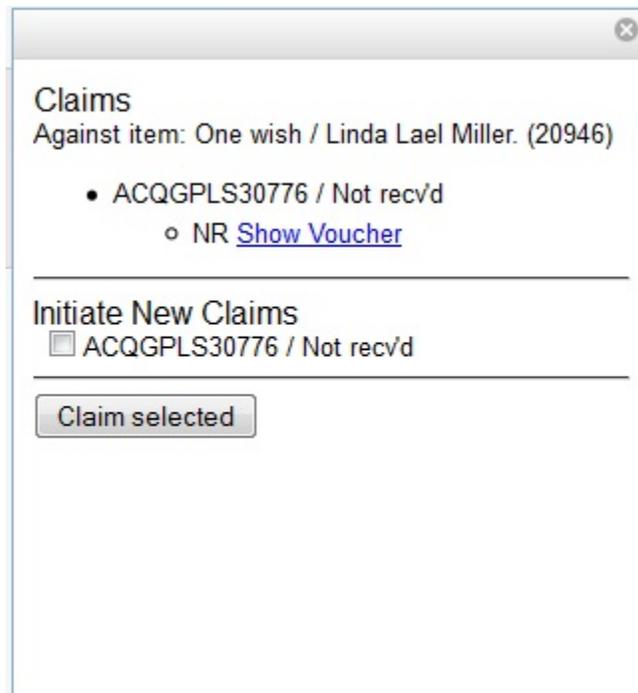
- Event type: EMAIL (Library initiated)
Event date: 2015-09-10T15:35:13-0400
Order date: 2015-08-24T17:16:27-0400
Expected receive date:
Initiated by: admin, gpls acq
Barcode: ; Fund: PLSTA (2013)

- Claim Type (Claim Reason)
- Title and Author of item
- Event Type: The action to be performed by the library to claim the item.



- Event Date: The date the item was claimed in Evergreen.
- Order Date: The date the purchase order for the item was activated.
- Expected receive date: (Not currently functional)
- Initiated by: The name of the staff member who manually claimed the item in Evergreen.
- Barcode: In most cases this will be a temporary system-generated barcode.
- Fund: The name of the fund being used to purchase the item.

1. Open a purchase order.
2. Click the *Action* menu and then choose *Claims* you wish to view the claim voucher for.
3. The claim type (claim reason) will display with a *Show Voucher* link. Click the *Show Voucher* link.



4. You should be able to print the voucher at this screen. (BUG: This link works inconsistently.)

Claim: 17 (NR)

Against: One wish / Linda Lael Miller.

- Event type: EMAIL (Library initiated)
Event date: 2015-09-10T15:35:13-0400
Order date: 2015-08-24T17:16:27-0400
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-

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Last update: **2018/10/11 20:15**

