Item Statuses and Actions

For complete list of possible statuses, see: Cataloging Manual: Item Statuses

Available

The item is on the shelf and available for check out.

Checked Out

The item is checked out to a patron. This status does not indicate whether or not the item is overdue.

Claims Returned Items

Claims Returned is used when both a library system and a patron are unable to agree on the location of the disputed item thus creating a 'draw' or 'amnesty' for the item [2010.02]. If a user claims to have returned materials that still show as checked out, the material may be marked with a Claims Returned date. Overdue fines stop accruing as of the date entered in the Claims Returned field.

A user may have up to 5 Claims Returned items on his/her record, after which no more items for that user can be marked Claims Returned. If Claims Returned items are found, the Claims Returned counter on the patron’s account information screen may be manually changed at the discretion of the owning library system.

A Claims Returned item can be declared Lost by the owning library if it is not found after 45 days [1999.10].

- More Information about Claims Returned

Damaged Items

Damaged Items Policy

When an item is marked Damaged, it is hidden from the public catalog and will not be targeted for holds. The Damaged item status may be used for items that are damaged beyond repair and will need to be discarded, or for items that will be returned to the collection after repairs. The Damaged item status may be used regardless of whether or not a patron will be billed for damages.

Only the library that owns an item should assess whether or not a patron should be billed for damages to that item or not. The owning library may choose to bill the entire cost of the item plus a processing fee if an item is damaged by the patron beyond repair, or may choose to bill a partial amount (for example, when there is repairable damage such as a minimally torn cover), or may choose to mark the item damaged without billing the patron for it (for example, when there is damage caused by normal wear and tear).

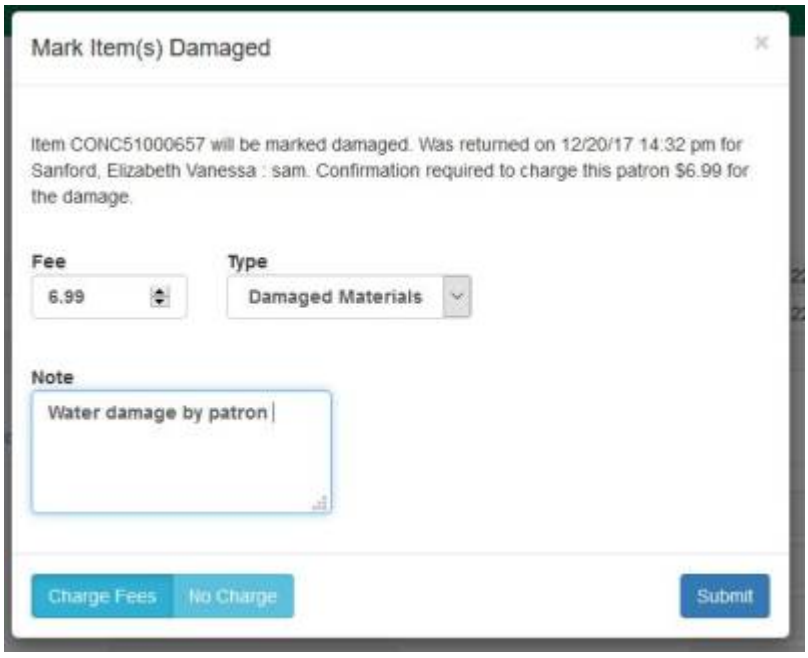
Libraries may choose to assess a processing fee of up to $10 per item for item damage on their own items (this is set in the Library Settings Editor). If the damage is assessed after the item has been checked in, a damaged bill may be added to the patron account manually.

Marking an item Damaged will *not* void overdue charges. If the patron is being billed the full price of an item, the library may choose to manually void overdues.

See Payment Retention and Reimbursal regarding payments on Damaged items that are accepted by a non-owning library.

Damaged Items Instructions

1. To mark an item Damaged, open it in the Item Status/Details screen.
2. Click the Actions button.
3. Select Mark > Item as Damaged.
4. You will be alerted that the item will be marked Damaged. Click Submit.
5. If the item is currently checked out or contains information about the last patron that had it checked out, a second popup will appear prompting you to choose whether to bill the patron for the item or not. Your options will be to bill the full amount plus processing fee (this is the amount that appears by default), to bill a different amount (simply type in a different amount), or not to charge (click on the No Charge option).
6. Enter a note describing the type of damage.
7. Once you have made your selection, click Submit.



If the damaged item belongs to another library, you may mark it damaged with No Charge so that it will return to its owning library and cannot be captured by a hold. If you do so, be sure to put a note on the physical item explaining that you have marked it damaged but have not charged for it so that it will be routed to the appropriate department at the owning library. The owning library may then go through the steps to mark it damaged a second time, and choose the fee they wish to apply.

Discard/Weed

Beginning January 2019, Circulation staff may now change items to a Discard/Weed status in order to streamline the weeding process. Marking an item Discard/Weed immediately hides it from the public catalog and it will not be able to be targeted for holds. Depending on local workflow, the items marked for Discard/Weed can either be placed into a bucket for review by cataloging staff, or cataloging staff may wish to run reports to obtain lists of items marked Discard/Weed.

- More information is available at: Marking Items Discard/Weed

In Process

A new item has been purchased by a library but is not yet available for checkout.

In Transit

The item is being shipped from one library location to another. This status is automatically assigned by the system. When an item arrives at its destination, a library staff member checks it in, which removes it from the In Transit status. If an item is in the In Transit status but does not arrive and cannot be located at either the sending or receiving library, the status can be manually changed to Missing.

See also: Items in Transit

Long Overdue Items

Items that are overdue for longer than 180 days are automatically changed to a status of LONG OVERDUE (unless the patron has been flagged for collections). The price of the item, plus an optional processing fee of up to $10 (set per library in the Library Settings Editor), is applied to the patron's card. Overdue fines on the item are automatically voided.

See Payment Retention and Reimbursal regarding payments on Long Overdue Items that are accepted by a non-owning library.

If the patron finds the item and returns it within 6 months (180 days) of payment, the system will void the item price and re-apply the overdue fines that had been previously voided. The system will not void processing fees.

If the patron has not paid for the item, but finds and returns it within 6 months (180 days), the system will void the item price and re-apply the overdue fines that had been previously voided. The system will not void processing fees.

Historical Note: The PINES Executive Committee agreed upon a Long Overdue policy in May of 2006 [2006.05], but the system was not capable of automating it at the time. Implementation of this feature occurred October 2014 and eligible items for the previous three years were marked Long Overdue.

Long Overdue Items Report

Shared Folders > Templates > ddale > Helpdesk Request > Collection Maintenance > Lost or Long Overdue and Paid Item List

Payment for Long Overdue Items

If a Long Overdue item is paid for at a different library than the owning library, the payment amount may be kept by the payment library unless the owning library sends an invoice for reimbursal within 90 days.

See Also:

- Staff Workflows for Long Overdue Processing
  - How Long Overdue Processing Works

Lost Items

A patron may inform staff that an item is LOST. Staff should mark the item LOST in Evergreen to create a bill for the lost item. The price of the item, plus an optional processing fee of up to $10 (set per library in the Library Settings Editor), will be assessed to the patron’s card. Overdue fines on the item will be automatically voided when marking an item lost [2002.09]. Lost items may be paid for at any PINES library.

See Payment Retention and Reimbursal regarding payments on Lost Items that are accepted by a non-owning library.

If an item has been marked lost that has not been paid for is returned within 180 days, Evergreen will automatically void the item’s cost and reinstate any overdue fines that had previously been voided when the item was marked lost. The system will not void processing fees.

Refunds on Lost and Long Overdue Items

If an item has been marked Lost or Long Overdue that has not been paid for is returned after 180 days, Evergreen will not void the item's cost.

Evergreen will not void processing fees. If a library chooses to forgive a processing fee for one of their

own items, staff must do it manually. Libraries must not forgive or void processing fees on items owned by other libraries.

Evergreen will only automatically void and restore fines associated with the circulation that resulted in the lost item. The system does not void/restore overdue fines related to other circulation transactions on an item.

“Found” materials may be returned to any PINES library but routed to the owning library, with the understanding that the owning library will be the final authority on whether the material is in acceptable condition for return. When appropriate, the owning library will issue a refund check to the patron via U. S. Mail. The refund check will be payable to the library cardholder on whose record the materials were circulated [1999.10].

Missing

Missing is a status assigned to items which show as available in the library catalog, but which are not found on the shelf. When an item is not found on the shelf, a staff member should manually mark the item Missing in Evergreen using the Item Status editor. The library should then run a regular report of items in Missing status to try to locate them, and then delete them as they see fit.

On Holds Shelf

The item has been placed on a library's Holds Shelf and is ready for pick up by the patron it is on hold for at the patron's desired pickup location.

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