Lost/Missing Replacement Process

Background:

- Analytics Missing Items Dashboard contains 8 reports that are automatically aged based on item modification date. These reports are used by User Services staff to perform ongoing searches.

1. Items missing for less than 3 months
2. Items missing between 3 and 6 months
3. Items missing between 6 and 9 months
4. Items missing less than 9 months
5. Items missing for more than 9 months (These will be deleted by Tech Services)
6. All missing items
7. All lost items (The system automatically generates a lost status based on overdue checkout time period. Items in this report could stay here for up to three years due to FTB workflow and links to patron records. After User Services clears items from patron record they will be deleted by Tech Services)
8. "Review for Replacement" All lost, missing, and items in the review for replacement work order.

- A scheduled monthly report #8 named "Review for Replacement" will be automatically e-mailed to the Bibliographers at librarians@csusm.edu and cashley@csusm.edu
- A scheduled weekly report #3 named "Items missing between 6 and 9 months" will be automatically e-mailed to the Bibliographers at librarians@csusm.edu and cashley@csusm.edu

- Bibliographers may request items on this report for replacement at any time by submitting orders via GOBI account with a note that it is a replacement order and e-mailing the title and fund code to be used to Tech Service group at tscm-l@csusm.edu

- Tech Services will move the bibliographer's selections into the 'Replacement Decisions Made' work order with a note for fund code and name of requestor.

- Bibliographers will have at least 9 months to make replacement decisions. Items that have been on the "Review for Replacement" report for more than 9 months may be deleted by Tech Services.

Replacement copies

When it is decided to replace a lost/missing/damaged item we want to keep the missing/damaged item record in the system for historical reasons (checkout activity etc.)

- Bibliographer will:

1. E-mail Tech services their selections with fund code for ordering.

- Metadata will:

1. Do a quick check for additional copies/editions and notify bibliographer in case they want to cancel replacement decision
    a. If bibliographer decides to cancel replacement decision add the following text to internal note field 1: "DO NOT REPLACE" along with a brief explanation of additional copy/editions available
    b. If cancelled replacement item was in "Lost" status delete the text "Review for replacement" from internal note field 1 and add the following text to internal note 1: "DO NOT REPLACE" along with a brief explanation of additional copy/editions available
2. Move the barcode out of barcode field and into the item internal note field (DO NOT MOVE BARCODE IF ITEM IS LOST - lost items are still linked to patron records with billing info and barcode will be needed to eventually clear the item from patron record).
    a. If replacement item was in "Lost" status add the following text to internal note field 1: Replacement decision made
3. Remove item from Review for replacement work order and delete 'Review for replacement" from the internal note field.
4. Clear/toggle missing process type.
5. Change location code to "Library Suppressed"
6. Place the item in Replacement Decision Made work order.
   (Items in any type of process like 'lost' or 'missing' can't be directly placed in a work order, they will go into a que. If lost or missing items are selected for replacement before the search cycle is complete they must be sent directly to Acq. department)

- Acquisitions will:

1. Place the order on existing bib record as soon as funds are available.

2. Clear item from Replacement Decision Made work order.
3. Add a note to the item record that replacement has been ordered (date/initial)
4. Add new item record when replacement is received.
5. Send replacement copy to Metadata for record verification.

- Metadata will:

1. Verify bibliographic record for new replacement item is correct and make adjustments as needed (overlay new bib record if updated version, update/delete holdings in WorldCat)
2. Remove old item from Replacement Decision Made work order
3. Change old item location to either 'Library Suppressed' or 'Media Suppressed' and add a note with the original OCLC# if new replacement copy is different edition.

ADDITIONAL STEPS for User Services and Tech Services staff:

Items that do not need to go through search cycle:

(Could be damaged/lost items that a patron pays for and decides to keep or Circuit/ILL write-offs)

- User Services will:

1. Clear item from patron record and E-mail barcode to Tech Services tscm-l@csusm.edu Indicating that the item needs to go into work order

- Metadata will:

1. Place item in Review for Replacement work order
2. Add 'Review for replacement' to internal note 1
3. Move barcode to item internal note

Lost Items

These items will have been on bibliographers review list for over 9 months and could potentially stay in process type lost for up to three years due to FTB workflow and links to patron records.

- User Services will:

1. Clear item from patron record and E-mail barcode to Tech Services tscm-l@csusm.edu

- Metadata will:

1. Withdraw items from Alma and delete holdings from OCLC as applicable.

Items not selected for replacement

Items in missing process and items in Review for Replacement work order for over 9 months

- Metadata will:

1. Remove items from work order and withdraw items from Alma
2. Delete holdings from OCLC if applicable

(If an item is not selected for replacement, is withdrawn, and subsequently shows up, Metadata will add the item back into Alma)