

# Circulation Services Group Meeting of October 5, 2021

Tuesday, October 5, 2021; 2-3:30pm [Zoom Link](#)

Jennifer Osgood (co-chair), Blake Lindsey (co-chair), Craig Alderson, Angela Arnold, Ryan Barnette, Peter Basmarjian, Tom Brown, Albert Chung, Ellen Dario, Georgia Dong, Bonita Dyess, Michael Golden, Sheehan Grant, Dori Hsiao, Jenna Jackson, Cassandra Karp, Paul King, Nancy Lewis, Brian Light, Shannon Monroe, Phylcia Mossiah, Scott Peterson, Sophie Rainer, Agustin Ramirez, Neda Salem, Rosemary Sallee, Jenny Schuelke, Patrick Shannon, Andrew Shapiro, Beth Shippey, Marito Solis, Peter Soriano, Brice Sullivan, Samantha Teremi, Michael Villarreal

1. Introductions
2. Announcements
  - a. Ryan Barnette - The Attach Request function for AFN requests is working more consistently.
  - b. Peter Soriano - Alma Fulfillment office hours are being held on Wednesday, October 6, at 1 p.m. He will present a brief overview of the search process and take general questions. Also, there are now updated fulfillment exercises for Alma sandbox training; contact your COM or Peter for the login and password to the Alma sandbox.
  - c. Peter Soriano - Peter reminded the group of the difference between Alma requests: if we cancel a request for a UCB patron, the request disappears; if we cancel an AFN request, the request gets bounced to another UC location.
    - i. The Terms of Use on our items are supposed to turn unfulfilled local requests into resource sharing requests, but at present that does not appear to be the case.
    - ii. There is supposed to be a way to “reject” a request rather than canceling it, but that may be a configuration issue.
    - iii. “Skip location” is available on some requests, but usually only if owned by two locations on campus.
  - d. Brian Light - The E-Reserves team is looking for new members for the Spring; if anyone has time or energy to lend a hand, let your supervisor know and the team would be happy to have you.
3. Changing the delay between when a notice is created and when it is sent to the patron (Tom Brown)
  - a. Tom proposed implementing a longer delay. The delay is currently 30 minutes, but DMCS has issues getting items onto holdshelves within the current 30-minute window. The group discussed extending the delay to an hour. With no major objections, Blake and Tom will reach out to Mark Marrow.
4. Patron Covid restriction compliance (Blake Lindsey)

- a. Blake has had a couple patrons who pushed back against masks and wanted to ask the group what other staff were seeing. The group talked about doing walk-throughs of their libraries, having extra masks at the desk to offer to non-masked patrons, and getting extra PPE from EH&S.
    - i. UC Berkeley COVID-19 Supplies Replenishment Request Center form: [https://docs.google.com/forms/d/e/1FAIpQLSdtke\\_tOwBI2MpjzhlGA5hVjVs\\_NpAN2OqDgwGoEYWD6qSOAA/viewform](https://docs.google.com/forms/d/e/1FAIpQLSdtke_tOwBI2MpjzhlGA5hVjVs_NpAN2OqDgwGoEYWD6qSOAA/viewform)
  - b. Brian Light commented that staff can report non-masking issues to EH&S and they will send someone to do a walkthrough of the space. (<https://ehs.berkeley.edu/about>)
  - c. Sheehan Grant reminded everyone that staff are eligible for booster shots. ([myturn.ca.gov](http://myturn.ca.gov))
5. Claim Returns update (Brice)
- a. Brice talked about the new workflow for claims returns and shared a draft document with the group. He would like feedback from circulation staff to pass up to mark Marrow. One known issue is how to contact other libraries if they are implicated in the search. The draft document is copied below.
6. Patrons with scooters inside (Blake Lindsey)
- a. Patrons are more frequently bringing scooters into the libraries (campus has had an increase of scooter thefts). The Library Code of Conduct outlines what and where scooter use/storage is allowed. The group discussed revising our policy to emphasize scooters are allowed if they are collapsed, being kept with the patron, and not blocking pathways. Broader issues should be taken up to security council and/or PSC.
  - b. Proposed amendment to the Code of Conduct:  
*"Ride mopeds, bicycles, skateboards, scooters, inline skates, roller skates, or hoverboards in Library buildings or on walkways where hazards, property damage, or personal injury could be created by their use. These vehicles also may not be stored in any public spaces, hallways, corridors, offices, balconies, or stairwells, or attached to railings. **Patrons are allowed to keep skateboards, hoverboards, inline skates, roller skates, and collapsible scooters on their person so long as the items are carried by hand and stored in a way which keeps walkways clear (i.e. stored under a chair or desk the patron is using). Bicycles, mopeds, and scooters which can not be collapsed must be locked up outside. Exceptions are made for strollers and vehicles used by persons with disabilities.**"*
7. Open discussion
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## Claimed Returned Draft Workflow

This document will outline how to file a Claims Returned, the timeline for searches and how to retrieve search information. Additionally, it will describe how to update item records after each search. Claims Returns can be placed at any library; patrons do not need to go to the owning unit to place the claims returned. When a patron claims to have returned an item, staff should first ascertain to which library the patron believes he or she returned the item. Both the returning library and the owning library should be contacted so that both can search for the missing material.

### IF THE ITEM IS NOT YET BILLED (ALMA PROCESS)

#### **Change the Due Date:**

Once it is determined that a Claims Returned is necessary, change the due date of the item to 1 month (30 days) from today. This will prevent the patron from becoming blocked and billed during the search period. The due date must be changed before the item is placed on claims returned status. It may not be possible to change the due date if

- Locate item in the patron's **All loans** display
- Click the Ellipses [...] and select **Change Due Date**
- Choose a due date 1-month from today and click **Change Due Date**

*From AskTico Procedure* "If there is an item level *hold* on the item and there are other circulating copies on campus, move the *hold* to another copy. If no other circulating copies exist, the due date *cannot* be changed, as with a recalled item. If an item is recalled, then the due date *cannot* be changed. A *recall* cannot be moved to another item, even if there are other circulating copies on campus. Once a *recall* is placed, the due date cannot be changed even if the *recall* is cancelled or moved to another item."

#### **Place the Claimed Returned:**

- Click the Ellipses [...] and select Claimed Returned
- Add note: "Claims returned on [Today's date] at [location patron believes item was returned]
- You may also choose to append contextual information that might be useful to this note (Ex. "Patron claims to have mailed it to Doe Library in March 2020")

Inform the patron of the following:

- A series of weekly searches will take place for the next month.
- If found, they will be emailed a return receipt for the item and will not owe a replacement fee or late fines.
- If not found the item will be declared lost and they will be charged a replacement fee.

## Searching for Claimed Returned Items:

It is recommended that all units check for Claimed Returned reports on a weekly basis at minimum. Fulfillment reports listing active Claimed Returned items can be found by going to **Analytics** → **Fulfillment Searches** → **Claimed Returned**. These reports can be printed as a pdf and given to a student to search. Staff will need to manually update the Loan Notes in order to track the progress of the searches.

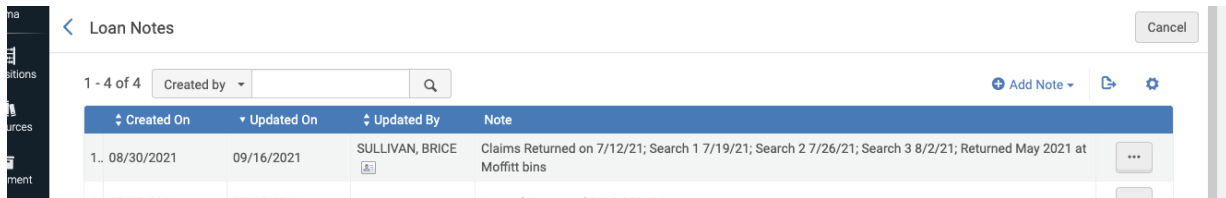
If the item is found:

- Review patron's Active Balance Fine/Fee display to determine if any unattached migration balances should be waived.
- From **Return Items** screen scan the item barcode.

If the item is not found.

- From the Patron Services display select **View notes** from the item's Ellipses [...] menu
- From the Ellipses [menu] select **Edit**
- Update the Loan Note with the Search date and number. Ex: "Search 2 9/9/21". This should be added to the existing note text.

Example Loan Note after third search:



Created On	Updated On	Updated By	Note
08/30/2021	09/16/2021	SULLIVAN, BRICE	Claims Returned on 7/12/21; Search 1 7/19/21; Search 2 7/26/21; Search 3 8/2/21; Returned May 2021 at Moffitt bins

## (OPTIONAL) Marking the item Lost:

If the final search of the 1-month period is unsuccessful, the item may be marked Lost to generate a replacement charge. If not done the item will proceed through the normal overdue-->blocked-->billed timeline and will remain on the CR report until billed replacement.

- From the patron's All Loans display, select **Lost** from the item's Ellipses [...] menu.
- A replacement fee for the item will automatically be generated and assessed to the patron's active balance.
- Review patron's Active Balance Fine/Fee display to determine if any unattached migration balances should be waived (ie. make sure we are not double billing the patron.)

IF THE ITEM IS ALREADY BILLED REPLACEMENT IN ALMA **\*\*UNDER DEVELOPMENT\*\***

Alternate #1 UCSC & UCD Process (Manual / Off Alma)

Once an item has been marked lost and/or billed replacement we can no longer mark an item "Claimed Returned." using Alma. When this situation arises, please email the patron information, book title, and book barcode to the owning library's circulation supervisor. They will then manually assign and track 3 searches on that item. If we find an item, it should be checked in, the bill will need to be removed from their account. If we do not find the item we will not contact the patron, and they should expect to be responsible for the fee. Searches take 30 days to complete.

Alternate #2 Alma based method based on using the Found feature. **\*\*TEST IN SANDBOX ONLY\*\***

1. Return to the patron's All loans display and from the item's Ellipses [...] select **Found**
2. Follow the normal process to place a Claimed Returned.

For a thread discussion on problems related to Claimed returned on items billed replacement and marked Lost see here. <https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/37357075-claimed-returned-option-for-lost-items>