



The DISCARD Process

WITHDRAWN

MISSING

CLAIMS RETURNED

CLAIMS LOST

ASSUMED LOST

LOST IN TRANSIT

Instructions for Library Staff Members

We call this the DISCARD Process because the final destination or status of all items that are withdrawn, lost or missing is **Current Location DISCARD**. There are two ways an item can get to DISCARD:

- It can be charged out to a DISCARD user by a staff member
- It can be converted to DISCARD by a Symphony report

Items that are at DISCARD will be removed from our database by a monthly report called **Remove DISCARD** if the item:

- is not checked out
- has no bills
- has no holds

Items at DISCARD with charges, bills or holds remain in our database.

Ideally, an item's progress from being in your collection to being at DISCARD should include stops along the way so that you can:

- search your shelves for the item
- decide if the item should be replaced

Withdrawn, lost and **missing** items should stay in our database just long enough in case:

- they are misshelved,
- users find and return them

What follows are descriptions, graphics and instructions for 6 common situations that feed into the DISCARD Process. An item starts down the DISCARD path if:

1. a staff member decides to withdraw it (WITHDRAWN)
2. it can't be found where it should be (MISSING)
3. a user claims he returned it (CLAIMS RETURNED)
4. a user admits he lost it (CLAIMS LOST)
5. it is long overdue (ASSUMED LOST)
6. it is lost on its way to or from another library (LOST IN TRANSIT)

These instructions and the charts that go with them are work in progress and will be updated, with the help of our libraries, as we learn more and develop better ways to do things.

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Key to Charts

<i>Red</i>	<i>WorkFlows transaction</i>
<i>Green</i>	<i>Symphony report</i>
<i>Blue</i>	<i>Task</i>
<i>Purple</i>	<i>Connector to another chart</i>
<i>Dark blue outline</i>	<i>Not yet developed</i>

WITHDRAWN

Definition: An item is withdrawn by a library staff member who makes a decision to remove the item from the collection because it is no longer wanted. Inventory, weeding projects and mending routines commonly cause items to be withdrawn. Generally speaking, an item must be in hand in order to be withdrawn. It is charged out to the library's withdrawn or discard user.

Steps

1. Decide to withdraw item
2. Check out to discard user
3. Monthly trans report-- tells you how many items were withdrawn.
4. Monthly convert DISCARD report—discharges item from your DISCARD user, changes item's current location from WITHDRAWN to DISCARD
5. Monthly Remove DISCARD Items report—removes items from the database if item is not charged to a user, has no holds and has no bills.

Notes

1. If the item is already checked out, discharge it before checking it out to discard.
2. Library discard users:

Library	User ID	Library	User ID
BLOO	BLOOMINGDL-DIS	PATE	PATERSON-DIS
CALD	CALDWELL-DIS	PATE-FIR	PAT-FIRST-DIS
CEDA	CEDARGR-DIS	PATE-SOU	PAT-SOUTH-DIS
CLIF	CLIFTON-DIS	PATE-TOT	PAT-TOTOWA-DIS
CLIF-ALL	ALLWOOD-DIS	PCCC	PCCC-DIS
FAIR	FAIRFIELD-DIS	PCCC-WAN	PCCCWAN-DIS
HALE	HALEDON-DIS	POMP	POMPTON-DIS
LITT	LITTLEFALL-DIS	RING	RINGWOOD-DIS
NHAL	N-HALEDON-DIS	TOTO	TOTOWA-DIS
ORAN	ORANGE-DIS	WANA	36044000521381
PASS	PASSAIC-DIS	WAYN	WAYNE-DIS
PASS-REI	PASS-REID-DIS	WAYN-PRE	PREAKNESS-DIS
		WMIL	W-MILFORD-DIS
		WPAR	W-PATERSON-DIS

Place holder for WITHDRAWN diagram

MISSING

Definition: An item is missing when it is not found where it is expected to be within the library. Filling on shelf holds and questions from users are common ways we find an item is missing. Generally speaking, an item is not in hand when it is reported missing. The item is marked missing using the WorkFlows wizard.

Steps

1. Mark item missing using the Mark Item Missing wizard.
2. Once a month check shelves for items on the New Missing and Old Missing reports.
3. On the 5th of each month route the Selectors End of the Road report to one or more people who do collection development at the library.
4. Selectors decide if missing items need to be reordered or replaced.
5. Monthly convert DISCARD report—discharges item from the MISSING user, changes item's current location from MISSING to DISCARD
6. Monthly Remove DISCARD Items report—removes items from the database if item is not charged to a user, has no holds and has no bills.

Notes

1. The Mark Item Missing wizard charges items to a user called MISSING. The PALS Plus libraries share one missing user.
2. The New Missing and Old Missing reports insure that you are doing two shelf checks for missing items. each 5th of the month a library staff member retrieves these two reports. The New Missing report lists items that were marked missing the month before. The Old Missing report lists items that were charged to missing two months before. If an item is found, discharge it and shelve it. If an item is not found, go on to the next one listed.
3. If a selector decides to reorder or replace an item, follow your normal acquisitions process. If a selector decides not to reorder or replace, no further action is required.
4. There is no deadline for making selection decisions. Items can be reordered or replaced at any time.

Placeholder for MISSING Chart

CLAIMS RETURNED

Definition: An item is claims returned when it has not been returned to the library and the user who charged it out claims that he or she brought it back. An item is not in hand when it is reported claims returned. The item is designated as claims returned with the User Claims Returned wizard in WorkFlows.

Steps

1. Use the User Claims Returned wizard in WorkFlows to mark item claims returned. Follow standard procedures regarding the date of the claims returned.
2. On the 5th of each month retrieve the MO Claims Returned reports. For each item listed in the report, discharge the item from the user.
3. Mark each item MISSING using the Mark Item Missing wizard in WorkFlows.
4. These items will now be MISSING and will appear on monthly MISSING reports for circulation staff and selectors. Refer to the MISSING instructions for details.

Notes

1. Items may be at status LOST-ASSUM. If so, make sure to check for bills before discharging the items and charging them to MISSING.
2. The MO Claims Returned report lists the items that were claimed returned 4 months ago

Placeholder for CLAIMS RETURNED Chart

ASSUMED LOST

Definition: An item is assumed lost when it has been overdue for a certain period of time. Items are automatically given the current location LOST-ASSUM by the SirsiDynix software. Some items are billed to the users who have checked them out.

Steps

1. x
2. x
3. x
4. x
5. x

Notes

1. Items at LOST-ASSUM may or may not be charged out to a user. If the fines and fees have been paid or removed, the item will not be charged. so, make sure to check for bills before discharging the items and charging them to MISSING.

LOST IN TRANSIT

Definition:

Steps

1. x
2. x
3. x
4. x
5. x

Notes

1. X

