

Rural Libraries Queensland

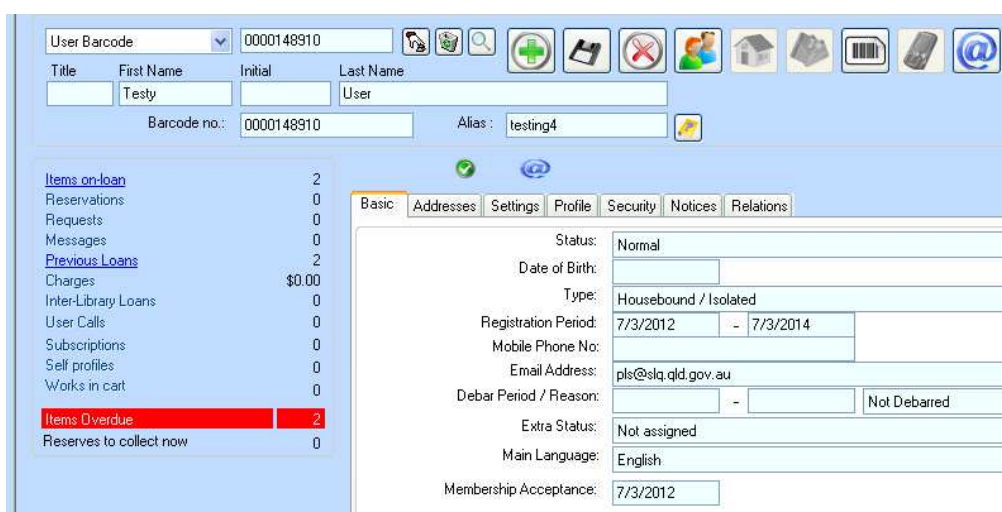
your local library network

Overdues and User Maintenance

This procedure applies to users with outstanding overdue items. The procedure is to provide a standard for maintaining user records and for items that will never be returned. Tasks covered include:

- ***Debarring a user***
- ***Adding a “message” to a user***
- ***Adding a “call” to a user***
- ***Making an item missing***
- ***Deleting an overdue item***

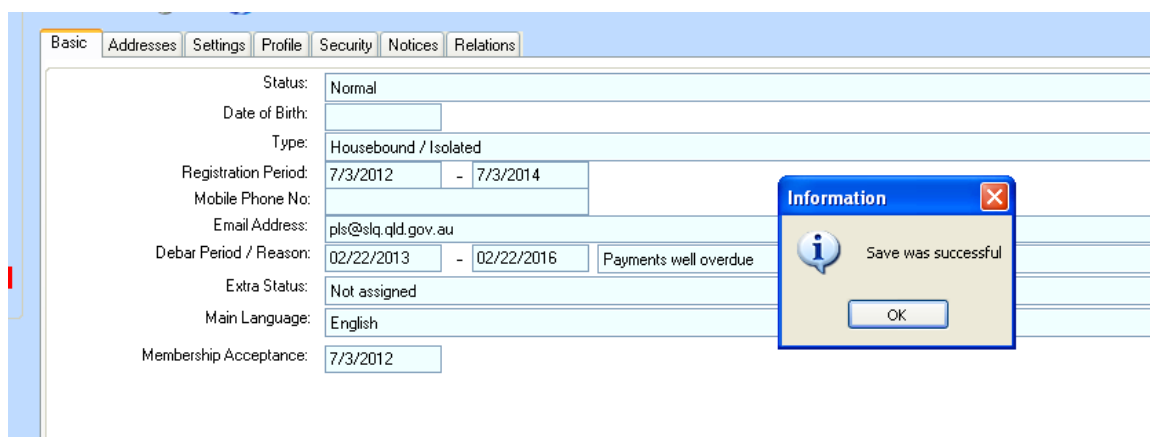
1. Go to the user’s record that has overdue items - **User Details** (F7) screen.



Items on-loan	2
Reservations	0
Requests	0
Messages	0
Previous Loans	2
Charges	\$0.00
Inter-Library Loans	0
User Calls	0
Subscriptions	0
Self profiles	0
Works in cart	0
Items Overdue	2
Reserves to collect now	0

- Users that have overdue items are identified by the **red highlighted overdue bar**.

2. Debar the user and provide a reason/justification and save (calendar is by month/day/year).



- The duration of a user’s debar depends on the library/council policies. The minimum period is 1 year.

- Once the user is debarred the system indicates this with a red siren icon.

Basic Addresses Settings Profile Security Notices Relations

Status: Normal

Date of Birth:

Type: Housebound / Isolated

Registration Period: 7/3/2012 - 7/3/2014


Mobile Phone No:

Email Address: pls@slq.qld.gov.au

Debar Period / Reason: 2/22/2013 - 2/22/2016 Payments well overdue

- Click on the **User Links** icon and type in the user's barcode.



- In the **Messages** tab, click on the  add icon and then type in the message. Add relevant information about each loan, date, charges or fines and Save. This will be a record for later use for staff if a client claims item has been returned. The more information the better.

Items on-loan 2

Reservations 0

Requests 0

Messages 0

Previous Loans 2

Charges \$0.00

Inter-Library Loans 0

Calls 0

Subscriptions 0

Works in cart 0

Items Overdue 2

Reserves ready to collect 0

Add Charge Calls Subscriptions Requests Inter-library loan:

Items Reserves Messages Previous Loans Pay

Message Type

Permanent Delivery

DeleteUponViewing No Operator Prompt

Patron debarred non return of 2 items. 1) Gold: the fever that forever changed australia / David Hill. 2) Monash: the forgotten Anzac (video). \$30 each total \$60. 22/02/2013

****If your council does not charge for lost, missing overdue materials, add relevant information about each loan & date and save but exclude fine/cost information.**

Nominate if the message is standard or if it should be hidden from public access. All standard messages will be visible to your user in the online catalogue, so be mindful of the text and the tone used in the message.

Font size

Subscriptions Requests Inter-library loans

Items Reserves Messages Previous Loans Pay Add Charge Calls

Type

Standard Hide from public access

Action

Permanent Delivery

Delete upon viewing No Operator Prompt

The messages area also includes responses to suggestions made by the user and keeps them informed of their progress.

Note: outdated messages can be deleted at anytime.

Messages					
#	Type	Message	Date Added	Action	
<input type="checkbox"/>	1	Standard	Suggestion was deleted(9870) . Title: Broadchurch series 2 . Reason: The item has been ordered & reserved for you	18/01/2016 1:10 PM	Undefined
<input type="checkbox"/>	2	Standard	Suggestion was deleted(9560) . Title: Indian summers season one . Reason: The item has been ordered & reserved for you	16/12/2015 8:22 AM	Undefined
<input type="checkbox"/>	3	Standard	Suggestion was deleted(9559) . Title: The tunnel . Reason: I have received advice from JB that this order has been cancelled; no reason provid...	1/12/2015 9:04 AM	Undefined
<input type="checkbox"/>	4	Standard	Suggestion was deleted(9033) . Title: The rebel ship Minerva: from Ireland to Sydney 1800 . Reason: The item has been ordered & reserved for ...	10/08/2015 2:18 PM	Undefined
<input type="checkbox"/>	5	Standard	Operator: check user's email address.	15/07/2015 9:52 AM	Permanent message

6. You can also add a message about contacting the client about overdue materials in the **Calls** tab.

Items on-loan 2

Reservations 0

Requests 0

Messages 1

Previous Loans 2

Charges \$0.00

Inter-Library Loans 0

Calls 0

Subscriptions 0

Works in cart 0

Items Overdue 2

Reserves ready to collect 0

Items Reserves Messages Previous Loans Pay

Add Charge Calls Subscriptions Requests Inter-library loan

Date: 3/1/2013

Operator: PLS - Jason Richards


Type: Contact

Follow-up required

On:

By: PLS - Jason Richards

Tried to call 3 times but hung up each time.

Tip – you will need to click on the  add icon and then type in the message and save.

The calls area will also include a record of any email correspondence from the library, such as reservation notices or acknowledgements of suggestions. You can click on the link in the Notes area to see a copy of the email.

Calls			
#	Date	Type	Notes
1	Tuesday, 15 March 2016 12:32 PM	Notes	15/03/16 - User will be away during winter, due to return October 2016
2	Tuesday, 15 March 2016 12:30 PM	Contact	15/03/16 - telephoned user to remind them about the author visit next week.
3	Thursday, 3 March 2016 3:12 PM	Correspondence - Email	Web page (Click to see content)
4	Thursday, 17 December 2015 12:10 PM	Correspondence - Email	Web page (Click to see content)
5	Monday, 30 November 2015 2:45 PM	Correspondence - Email	Web page (Click to see content)
6	Wednesday, 27 May 2015 3:31 PM	Correspondence - Email	Web page (Click to see content)
7	Monday, 2 March 2015 12:39 PM	Correspondence - Email	Rural Libraries Queensland Public Library Services (PLS)2/03/2015 12:38 PMItems on-loan: 8 User: C
8	Tuesday, 29 July 2014 4:31 PM	Correspondence - Email	Web page (Click to see content)
9	Monday, 28 April 2014 10:24 AM	Reservation Notices - SMS	Back roads Great Britain

Note: outdated messages can be deleted at anytime.

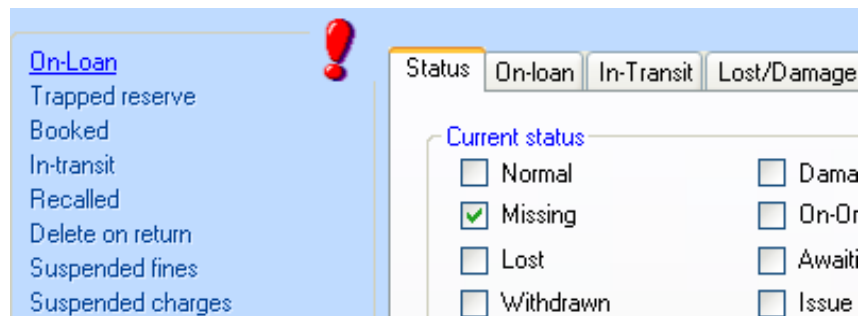
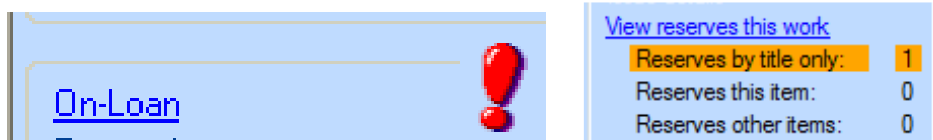
- You can view messages and call notices that have been added to the user's record; these are now highlighted [blue](#).
Hint - These are both visible on the **User Details** and **User Links** pages

Items on-loan	2
Reservations	0
Requests	0
Messages	1
Previous Loans	2
Charges	\$0.00
Inter-Library Loans	0
Calls	1
Subscriptions	0
Works in cart	0
Items Overdue	2
Reserves ready to collect	0

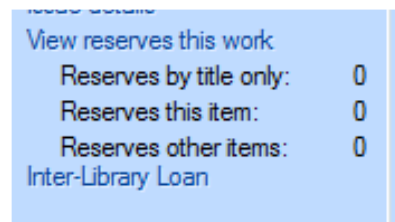
Deleting items Vs flagging items as Missing

Tip: Before deleting items you will need to check whether there are any reservations pending for the overdue work.

8. **Deleting items** – If there are **reservations** for the title, make the item missing. PLD staff will notify the user's library and will delete the item



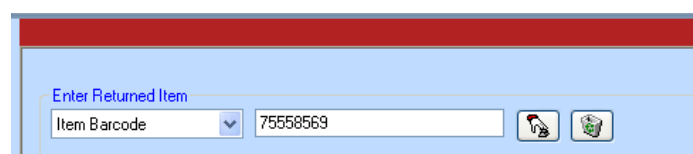
9. If an overdue item has no reservations then the item can be deleted.



10. Go back to **User Links** page and copy barcodes that are to be deleted.

#	Date of Loan	Date Due	Reserves	Item Barcode
<input checked="" type="checkbox"/> 1	2/20/2013 12:20 PM	2/21/2013 10:59 PM		75558569
<input type="checkbox"/> 2	2/20/2013 12:20 PM	2/21/2013 10:59 PM		72193149

11. Click on **Return** (F3) and return the book.



12. Go to “Item Transfer” (F12) – “Clear Item Temporary Location” and delete item. Do this for all overdue items that need to be deleted

Delete Item
 Warn if last item in work to be deleted
 Delete child holding if last item holding deleted
 Delete work if last Item deleted
 Bypass 'Item Status' prompt
 Bypass 'Item Reserved' prompt
 Use sub-location in output filename

Verify transaction

Item Barcode: 75558569

13. Once you have deleted the overdue books the user will be:

- (1) debarred
- (2) have a message and call notice attached to their record
- (3) the overdue items no longer appear in the catalogue

Items on-loan	0
Reservations	0
Requests	0
Messages	1
Previous Loans	2
Charges	\$0.00
Inter-Library Loans	0
Calls	1
Subscriptions	0
Works in cart	0
Items Overdue	0
Reserves ready to collect	0

14. If the user tries to get another loan; a pop-up box will warn the staff member not to loan the book to the client until the issue has been resolved. If in time the user does return the books, the warning messages can be removed from the **User Links** page.

Messages

1. Patron debarred non return of 2 items. 1) Gold: the fever that forever changed australia / David Hill. 2) Monash: the forgotten

Noted?

15. If the user returns the books after deletion, the books can be added to the system. (*Tip sheet: Adding Items at Your Library*).