

Use of Sierra Claims Returned

Recommendation from V-Cat Cooperative Circulation Committee:

V-Cat member libraries should not use Claims Returned for items owned by other V-Cat libraries. Libraries may set their own local procedures for marking their own items as Claims Returned.

Sierra Documentation on Claims Returned

When you claim an item returned, the system does the following:

- Places a claimed returned note in both the item and patron records.
- (Optional – see below) Removes the check-out link between the patron and the item; this is equivalent to checking in the item without assessing a fine. If desired, the operator can generate a manual charge and apply it to the patron.
- (Optional – see below) Flags the item as missing (**STATUS** = 'm') and cancels any outstanding holds on the item

It is a local decision whether to make an item claims returned and who at the library may make the change.

To claim one or more items as returned by a patron:

1. If the patron's record is not already displaying, retrieve it.
2. View the Checked-Out Items tab:
 - Click on the **Checked-Out Items** tab, *or*
 - Choose **Go | Circulation | Circulation Desk | Checked-Out Items**
3. Select the item(s) to claim returned from the table of items checked out to the patron. If you select more than one item, all selected items will have the same claim returned date and will be checked in or left checked out together.
4. Choose the **Claim Returned** button. The system displays a dialog for choosing the claims returned date.
5. Select a date or, if the patron does not know when he/she returned the item, choose the **Blank Date** button at the bottom of the dialog. The claims returned notes will indicate an "Unknown Date," for example: **Mon Jun 07 1999: Claimed returned .i1170805 on Unknown Date**
6. Choose one of the following options, depending on what you want the system to do to the item record:
 - **Check in items (with no fines) and change status to MISSING**
The system changes the item's **STATUS** to 'm', checks in the item, and prompts you to cancel any outstanding holds on the item. The system no longer holds the patron responsible for the item.
 - **Check in items (with no fines) and change status to CLAIMS RTRND**
The system changes the item's **STATUS** to 'z', checks in the item, and waives any outstanding fines or bills for the checkout. Charges associated with previous

transactions are not automatically waived. The system no longer holds the patron responsible for the item.

- **Leave items checked out (send overdue notices) and change status to CLAIMS RTRND**

The system changes the item's **STATUS** to 'z' and leaves the item checked out to the patron. If the patron does not return the item, the system continues to send overdue notices, generate a bill, etc. The system considers the patron still responsible for the item.

NOTE: After an item's STATUS changes to 'n' (BILLED) due to a bill's generation, staff can waive or adjust the charge, or collect the amount due. Manually changing the item STATUS to 'z' (CLAIMS RETURNED) does not remove the charge from the patron record.

When you choose any of the above three options, the system:

- Adds claims returned notes to both the item and patron records.

For example:

Item record - **NOTE Tue Jun 01 1999: Claimed returned on Tue Jun 01 1999 by .p1063529**

Patron record - **NOTE Tue Jun 01 1999: Claimed returned .i1047539 on Tue Jun 01 1999**
(from patron record)

- Increments the **CL RTRND** fixed-length field in the patron record.
- Adds the item record to the On Search file.