

Cheat Sheets for Timeline Tasks

Members reviewed the timeline of tasks, adding a few which were omitted and reviewing some parameters:

<u>Daily</u>	Formatted	Create List
Paging lists (both item and bib)	X	
Expired holds list	X	
Preparing and sending notices (effective Jan., 2014)	X	
Bounced email report, upon receipt from WVLS		
Backdating the check-in of overnight book returns		

Weekly

Checking the high-demand holds report	X	
– per agreed High Demand guidelines, need to determine if should buy another copy or a copy of item if not previously owned.		

Monthly

Missing items reports

- Should run a minimum of every 60 days for several reasons:
 - o To search for the item again
 - o To determine if library will replace item
 - o To determine if library will mark item for deletion
- Should not mark missing items for deletion before they have been in this status for at least 6 months.

Billed items reports

Long overdue items automatically progressed to billed.
 You may want to contact the patrons an additional time and start any procedure for referral to local police or a collection agency.
 (Owning libraries do not invoice checkout libraries for billed items. Effective June 2021)

Status update reports (e.g. in processing, transit, etc.)

- These will advise the library of items which need to be pursued (e.g. lost in transit, failure to check-in after processing completed, etc.)

Fines paid (just to look at it-FYI)

- For information, discover how much is collected for overdues, manual fees, etc., and how much waived for a given time period.

Lost & Paid*

- Identify the items in library which have been paid for:
 - o To determine if new copy should be ordered
 - o To determine if a more current title of same topic should be ordered
 - o To determine if library will mark the item for deletion

*Lost and Replacement Fines Paid Report provided by WVLS monthly is used for determining when a checkout library can be invoiced for materials owned by another library. Effective June 2021.

Items coming off High Demand		X
- Identify those items which have been on high demand and available for check-out for more than 4 months in order to: <ul style="list-style-type: none"> o Take the items off high demand if none of your patrons have holds on it o Abide by the V-Cat Circulation Guidelines 		
Changing juvenile patrons to adult ptype		X
- Identify those juvenile patrons who have become adults, so that: <ul style="list-style-type: none"> o New ID# can be acquired from the patron (no longer using the guardian's ID) o The patron will be able to check-out restricted items (e.g. R-rated DVDs) 		
Circulation statistics as needed	X	X

Approved: 2014-02-06

Updated 2021-06-03