

# 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 – per agreed High Demand guidelines, need to determine if should buy another copy or a copy of item if not previously owned.	X	
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## Monthly

<b>Missing items reports</b>		X
- Should run a minimum of every 60 days for several reasons: <ul style="list-style-type: none"> <li>o To search for the item again</li> <li>o To determine if library will replace item</li> <li>o To determine if library will mark item for deletion</li> </ul>		
- Should not mark missing items for deletion before they have been in this status for at least 6 months.		

<b>Billed items reports</b>		X
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)		

<b>Status update reports</b> (e.g. in processing, transit, etc.)		X
- 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.)		

<b>Fines paid (just to look at it-FYI)</b>	X	
- For information, discover how much is collected for overdues, manual fees, etc., and how much waived for a given time period.		

<b>Lost &amp; Paid*</b>		X
- Identify the items in library which have been paid for: <ul style="list-style-type: none"> <li>o To determine if new copy should be ordered</li> <li>o To determine if a more current title of same topic should be ordered</li> <li>o To determine if library will mark the item for deletion</li> </ul>		

\*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.

<b>Items coming off High Demand</b>		X
- Identify those items which have been on high demand and available for check-out for more than 4 months in order to:		
o Take the items off high demand if none of your patrons have holds on it		
o Abide by the V-Cat Circulation Guidelines		
<b>Changing juvenile patrons to adult ptype</b>		X
- Identify those juvenile patrons who have become adults, so that:		
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)		
<b>Circulation statistics as needed</b>	X	X

Approved: 2014-02-06

Updated 2021-06-03