

# Creating a Workflow for Lost & Overdue Items and Patron Invoicing

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# How do we make invoicing automatic?

- Item records migrated into Alma with no replacement cost
  - You can use terms of use to attach generic fines for lost items
  - We don't use generic fines; we charge for the current cost to replace the item
- We can manually add fines, but they are not automatically removed when item is checked in
  - If everything is manual, how would we efficiently keep track?

# Overdues Report

- Creates a list of items that are overdue but not yet “Lost”

## Selected Columns



Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Due Date	Item Location at time of loan	Bibliographic Details	Borrower Details	Physical Item Details
Due Date	Location Name	Title	Primary Identifier	Replacement cost

## Filters



Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.

Y "Due Date". "Due Date" BETWEEN timestampadd(sql\_tsi\_day,-28, current\_date) AND timestampadd(sql\_tsi\_day,-2, current\_date)

AND Y Return Date is null

AND Y Item Policy is not equal to / is not in [ILL Box Loan](#); [ILL Home Loan](#); [ILL Internal loan](#); [ILL Loan - Post graduates](#); [ILL Non-Circulating](#); [ILL Pickup](#); [ILL Reading Room](#); [ILL/Spec Loan](#); [RS Long Loan](#); [RS Short Loan](#); [RS ILLiad Loan](#)



Due Date	Primary Identifier	Title	Location Name	Replacement cost		
5/22/2020		CTS Mifi Devices	Equipment, Check-Out/Reserves Desk, First Floor	30		
		On fire : the (burning) case for a green new deal /	New Book Area, 1st Floor	27		
		The costs of connection : how data is colonizing human life and appropriating it for capitalism /	Circulating Collection, 3rd Floor	90		
		Persepolis /	Video Collection, 2nd Floor			
		Semester carrel keys.	Media Reserve, 2nd Floor Service Desk CARKY	25		
		Crochet hook.	Equipment, Check-Out/Reserves Desk, First Floor			
		Knitting Needle.	Equipment, Check-Out/Reserves Desk, First Floor			
		MacBook USB-C 61W Power Adapter	Equipment, Check-Out/Reserves Desk, First Floor	78		
		Being and time /	Circulating Collection, 3rd Floor	16		
		Digital Camcorder.	Equipment, 2nd Floor Service Desk	129		
		5/26/2020		Giving up baby : safe haven laws, motherhood, and reproductive justice /	Circulating Collection, 3rd Floor	88
				Ceramic design.	Circulating Collection, 3rd Floor	20
				Expressive therapy with troubled children /	Circulating Collection, 3rd Floor	42
Mysterious acts by my people /	Circulating Collection, 3rd Floor			25		
Play therapy with traumatized children : a prescriptive approach /	Circulating Collection, 3rd Floor			72		
Understanding children's drawings /	Circulating Collection, 3rd Floor					
Ancient Chinese inventions /	Circulating Collection, 3rd Floor			21		
Map making, the art that became a science.	Circulating Collection, 3rd Floor			80		
Surveys and surveyors of the public domain, 1785-1975 /	Circulating Collection, 3rd Floor					
The ancient engineers /	Circulating Collection, 3rd Floor					
Complete plays : Blasted, Phaedra's love, Cleansed, Crave, 4.48 psychosis, Skin /	Circulating Collection, 3rd Floor			25		
Reimagining a place for the wild /	Circulating Collection, 3rd Floor			41		
Breakfast at Tiffany's : a short novel and three stories /	Circulating Collection, 3rd Floor			15		
Lolita /	Circulating Collection, 3rd Floor			27		
Commentaries on living : second series, from the notebooks of J. Krishnamurti /	Circulating Collection, 3rd Floor			15		
5/27/2020				The marriage of opposites : a novel /	Circulating Collection, 3rd Floor	
				The shining /	Circulating Collection, 3rd Floor	
		The games : a global history of the Olympics /	Circulating Collection, 3rd Floor			
		The alchemist /	Circulating Collection, 3rd Floor			
		Chromebooks from SOB	Equipment, Check-Out/Reserves Desk, First Floor	243		
5/29/2020		Listening Headphones.	Equipment, Check-Out/Reserves Desk, First Floor	10		

# Loan chart

**Regular Loan:**

Day 1 – Item is overdue  
Day 7 – 1<sup>st</sup> overdue letter is sent out  
Day 14 – 2<sup>nd</sup> overdue letter is sent out  
Day 21 – 3<sup>rd</sup> overdue letter is sent out  
Day 28 – Item is marked "Lost"

**Short Loan:**

Day 1 – Item is overdue  
Day 2 – 1<sup>st</sup> overdue letter is sent out  
Day 4 – 2<sup>nd</sup> overdue letter is sent out  
Day 6 – 3<sup>rd</sup> overdue letter is sent out  
Day 8 – Item is marked "Lost"

- This gives us an idea of how much time we have before a student receives notices about a "Lost" item
  - Ideally we catch overdues as quickly as possible so that notices reflect the replacement cost

# When an item is about to be “Lost,” Alma sends a notice warning patrons about potential charges:

## Overdue Items Notification - Penfield Library

02/23/2020

This is to inform you that the items with the details below borrowed by you must be returned, otherwise they will be declared as lost.

### Penfield Library

Title	Description	Penfield Library	Loan date	Due date	Barcode	Call Number	
Fernand Léger / Peter De Francia.		Penfield Library	10/20/2019	02/09/2020	30263000566354	ND553.L58 D35 1983	<b>Lost item process fee:</b> 10.00 USD <b>Lost item replacement fee:</b> 50.00 USD

Once the item is “Lost,” Alma fines the patron and sends a summary of money owed:

## Fines\Fees Notification

Dear [REDACTED],

We would like to remind you that in Penfield Library you owe **267.99 USD**

Fee Type	Fee Amount
Lost item process fee	25.00 USD
Lost item replacement fee	242.99 USD

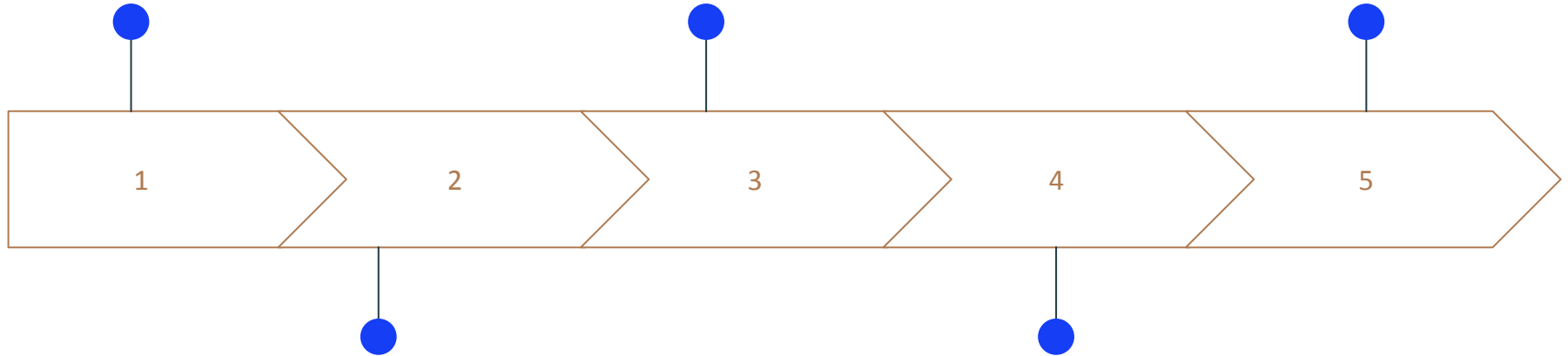
[Learn more about paying fines / fees here.](#)

Sincerely  
Check-Out & Reserves Desk

Staff adds replacement cost to overdue items

Alma automatically attaches fines when item is "lost"

Alma automatically removes fines when item is returned



Alma sends a notice when items are overdue/about to be "lost"

Alma sends a fines summary once per week