Basic Circulation Procedures: Discharging Workflow

Discharge = Check in = Return

Getting Started

- All items to be discharged must be present.

- If a patron requests a Date/Time Returned (Item Discharged) slip, you need to apply these steps before discharging.
  - Make certain the printer you want to use is designated as the default printer.
    - Start > Printers and Faxes > Highlight printer to use > Right click > Set as Default Printer > Close out.
  - For each Voyager location to be used, turn on Date/Time Returned receipt/slip printing by:
    - Options > Session Preferences > click Print Discharge Slips to add checkmark > OK. Do NOT immediately go back to double check as it can turn off the setting you just turned on.
  - One Date/Time Returned (Item Discharged) slip will print for each item.
  - When finished with items for the person and/or location, turn off receipt printing:
    - Options > Session Preferences > click Print Discharge Slips to remove checkmark > OK
  - Reminder: you must turn the options on and off in each Voyager session used.

- Sources of items to be discharged:
  - Returns from inside and outdoor book returns
  - Interlibrary Loan, Retrieve from Shelf, Annex items delivered for local Hold shelves
  - Items routed to your library as the designated Deliver to/Pick-up location
  - Strays/items found around the local library
  - Any library item that appears in the vicinity of the local service desk
  - If in doubt, discharge it!

Discharge Procedures

- Log on to/select appropriate Voyager location to discharge item(s):
  - You may need to move between logon locations to complete the process.
  - Use the “Locations in Each Policy Group” or “Be in the right place at the right time [Watson]” documents to clarify which location to use.

- Click the Discharge button on the Voyager Circulation task bar.
Scan barcodes or OCRs for each item:
  o Be careful. Read the messages that appear on the screen.
  o You will need to override to discharge items from another library location. If the item is shelved in your own library, you will need to be signed on to the correct location to discharge the item (otherwise you unnecessarily assign the item to the “Missing in Transit” report).
  o For items to be routed, immediately insert a routing slip to send the item to the correct location. Place the routing slip in the middle of the item with the necessary text appearing out of the top. Put the routers in your designated outgoing location. See additional information about Routing slips on page 5.
  o If a pop-up message mentions multiple parts, open and/or review the item to determine that all pieces are present before continuing with discharge.
    ▪ Items most likely to include multiple parts are DVDs and videos, books with pockets inside the front or back cover, and ILL items borrowed from another library.
  o If an ILL item is missing pieces, do not discharge; route to ILL with a “Not Discharged” flag inside annotated with the return date.
  o Open videos and DVDs to make certain the contents match the case before discharging.
  o For Library Use Only ILLs, discharge and place item(s) back on the Hold Shelf UNLESS patron has signed the book jacket OR it is the due date. Disregard the In Transit Discharged status in Voyager and keep on the Hold Shelf until the DUE DATE unless the patron has signed the book jacket.
  o When filling TripSaver requests at non-Watson locations:
    ▪ First, fill the request in the Call Slip client.
    ▪ Insert the Call Slip Request Form and a Route to TripSaver flag.
    ▪ Place in dark green (most locations) or gray (Anschutz) tubs for delivery to ILL.
  o If pop-up states Item marked as ‘Lost’ OR Item marked as ‘Claims Returned,’ click Cancel immediately. Give the item to the local circ supervisor with a report of the status. In Watson, record the date of return and your initials on the designated form and insert one in each item; place items on Gary’s Lost Shelf.
  o Identify damaged items as you retrieve items from the return chute. If the damage looks beyond the normal (wet, moldy, dog-eared), do NOT discharge the item.
    ▪ If the item is damaged beyond normal wear and tear, click Cancel to terminate the discharge process, record the date of return on paper, and give the item with the date of return to your supervisor (Gary’s Lost Shelf in Watson).
Basic Circulation Procedures: Discharging Workflow

- If the item is returned wet, but not moldy or with a bad odor, click **Cancel**, record the date of return, and immediately carry it to your supervisor (Gary’s Lost Shelf in Watson). Do not intermix the item with other library materials.
- If the item already shows signs of mold or smells bad, click Cancel, record the date of return, and while wearing gloves, bag the item in two layers of plastic bags.
- If the discharge process displays the “**Item is damaged**” pop-up, the item was previously identified as damaged.
  - If there appears to be no additional damage, discharge the item, but do not remove the Damage status. Route the item to the local repair process.
  - If there appears to be additional damage, **Cancel** the discharge and follow the steps outlined above, as determined by the condition of the item.
- For additional information, refer to “**Advanced Circulation Procedures: Handling Damaged Items at Return/Discharge**” (009-02 Damaged Items at Discharge).

- Re-sensitize each item.
  - Use the re-sensitizing device to reinstate items for the theft detection system.
  - Use special devices to re-sensitize videos and to insert red tabs in DVD cases.
  - Do NOT re-sensitize cassette tapes.

- And then:
  - For items that produce **Item On Hold** slips for your own circ desk:
    - Use procedures that insure identification of the person for whom the item is on hold and the hold shelf expiration date while ensuring that items on the local hold shelf do not bridge the privacy of the person for whom it is on hold.
    - In Anschutz: Fold the Item On Hold slip to display the name at the top, and insert it in the volume before placing it on the Hold Shelf.
    - In Watson: Record the patron’s Last Name, First Initial, and the Hold Shelf expiration date on the upper left corner on the front of the form; fold the sheet in half lengthwise, insert the sheet in the item, and immediately place the item on the Hold Shelf under the patron’s last name.
    - In Watson, items discharged in Room 225, in ILL, or in Cataloging that produce an On Hold slip need to be placed on the Hold Shelf at the Watson Service Desk within 30 minutes.
Basic Circulation Procedures: Discharging Workflow

- Identify items that need routine repairs (loose covers, for example), have loose or missing pages, and route them to the circ supervisor (*Julie’s Preservation Shelf in Watson*).
- Identify items that have record problems, won’t discharge, have Missing, Cataloging Review, or Circulation Review statuses, etc., and route them to the local circ supervisor for handling. In Watson, most items go to *Brenda’s Tech Shelf*.
- Identify and separate out items for any local projects such as the OCR to barcode updates.

- Place locally owned items ready for shelving on designated book trucks.
  - In Watson, Routing trucks should be moved to Room 225 and unloaded onto the designated shelves several times daily, Sunday through Saturday.

Discharging Challenges

- Pay attention to the discharge screens. Watch for pop-up messages (also known as “discharge alerts”).

- If you miss a pop-up message and scan the same item a second time, the result is that you click Yes or OK to the process suggested by the pop-up when often it should have been to Cancel the discharge process.

- If you scan a second item while the pop-up message for the first item is still on the screen, the result is that you clicked Yes or OK to the pop-up for the first item, and the second item does not get discharged.

- Examples of when pop-up messages are likely: items with multiple parts such as videos and DVDs, lost items, claims returned items, etc.

- Examples of consequences of not dealing with Discharge Alert Pop-up messages:
  - Items are not removed from borrower records resulting in lost item billings to patrons, and the need for staff to spend time looking for the items.
  - Lost and Claims Returned items are removed from the borrower records prematurely, but unpaid charges are not adjusted or forgiven as appropriate. This causes the borrower to have to report the problem to alert library staff that a problem still remains.

- May or may not be covered by a discharge alert:
  - Watch for multiple barcodes on items in a container or a container with one barcode and multiple items within. All barcodes must be scanned, and all items in a container must be scanned and accounted for.

- Be careful to scan the KU barcode or OCR number, not the publisher’s barcode.
Placing Items on Hold and Retrieving Items from Hold Shelves

- Both KU Library items and ILL items must be discharged for the hold to go into effect. Once discharged, the item goes **On Hold** for the patron and an **Item on Hold** flag is printed. This flag is then placed inside the book with the patron’s last name and expiration date visible. The discharge process is also what generates the Item Available notice to the patron.

- **Please make sure that the information on the printed piece of paper matches the actual book you are putting on hold. Occasionally, a slip prints twice, or the barcode is read incorrectly resulting in the wrong item on hold for the wrong patron.**

- Who an item is on hold for is confidential information. You may never disclose patron information of any kind to any person. The only information you can offer is to tell somebody that the item is on hold for somebody else. You may then suggest that they place a Recall or Interlibrary Loan (WebRetrieve) request for the item in question.

Inventory Lists

- If a patron requests a list of items remaining checked out after discharge, one option is to print the inventory list from within Voyager circulation. This can also be a possible solution if the patron asks for a receipt after the discharging has occurred. This list includes abbreviated titles, barcodes, and call numbers; enumeration and chronology do not appear when applicable.

- Click Charge icon > Swipe Borrower Card > Click Charged Items icon (card catalog drawer) to bring up Charged Items Index > click Print.

- The list will print to that workstation’s default printer. To send to another printer, follow these steps. From within Voyager circulation, click File on the menu bar. Select Print Setup > select preferred printer. Then go back to patron’s inventory to print.
Routing Slips

- The printing of Routing slips is turned off in Voyager System Administration. In order to turn on printing the Routing slips for problem solving or evidence, do this:
  - Within Voyager circulation > Options > Session Preferences > click Print Routing Slips > OK. Do NOT immediately go back to check as it can turn off the setting.

- Turn on this preference for each sign on (Art and Art NO, for example) at each workstation from which you want to print.

- One Routing slip will print for each item discharged.

- When finished, turn off printing:
  - Options > Session Preferences > click Print Routing Slips > OK.

Reminders about Handling ILL Items

- Discharge all newly delivered items in order to:
  - Generate the Item on Hold slip to place inside each item.
  - Generate the Item Available Notice to the patron.

- Open the Discharge function on Voyager taskbar.
  - Scan or key the barcode for each item. For ILL items, this is the ILLiad TN number such as: 1061850.
  - Take note of the “Pull from Hold Shelf date” in the upper right corner of the ILL jacket. If it is different from the one recorded on the Item on Hold slip, replace the date on the Item on Hold slip with the one from the ILL jacket.
  - Put the Item on Hold slip in each book and place it on the local Hold Shelf.