

CARL Conversations: May 19, 2021

Topic: Damaged Items Workflow

Question and Answer Session

1. Are staff supposed to be using CARL Connect for check-ins and outs along with other duties or CALR-X?

OWLS recommended staff using CARLX for check-ins and outs because Connect is missing some features when it comes to check-in and check-out. CARL Connect is what TLC is spending more time on developing and has more functionality overall, but CARL-X has the better check-in and check-out features. CARL Connect is great for registering new patrons and updating patron accounts.

2. What is the difference between the 'Withdraw' and 'Delete' options in the Connect Damaged Items list?

The 'Withdraw' option will change the status of the item to 'Withdrawn', while 'Delete' will delete the item from the BID and system, as long as there are no fines or holds against it. Withdrawing a damaged item will remove the 'Damaged Note' from the item record.

3. If you check in a damaged item as "Damaged" and it belongs to another library, does it print out a transit slip indicating as such to the owning library?

At this time, no, it does not. This is a newer development and over time TLC will build on this from the feedback given from the libraries. OWLS can suggest this for future development. Libraries will still need to use a Yellow Problem Slip to indicate the damage to the item.

4. If a patron can see they have a hold in transit, but then staff mark that item as Damaged, what will the patron then see?

A patron will see that they are in the holds queue. When an item is marked "Damaged," it places an ASAP hold for the patron placing them first in the holds queue. We realize it may be confusing for patrons to see a hold that was in transit revert back to the holds queue.

5. If an item is damaged and needs to be billed to the patron, do staff then create a bill for them?

If an item is returned that is damaged and staff want to bill the patron, then do not use the Damaged Item workflow (don't check it in as damaged). Staff would need to follow the [Go Lost procedure for non-circable items](#).

6. Would checking in a damaged item remove the damaged status?

Yes. If you check-in an item with a Damaged status, the system assumes it is no longer damaged and will give it an Available status or will use it fill the next hold in line.

7. Should the Damaged Items List be checked daily?

This would be up to the individual libraries and what they plan on doing with these items. OWLS thinks it would be a good idea to do once a week, but again, OWLS doesn't have a specific recommendation and it would depend on each library's individual needs. And, if an item is marked as damaged and being sent back to a library, the item may not be physically back at your library when you check for list.

8. If the Damaged Item box stays checked for items that shouldn't be Damaged, what happens then?

If staff forget to uncheck the Damaged Item box and unintentionally mark a handful of items as Damaged, they would just need to uncheck the box and Return them again. The system is assuming that if a Damaged item is checked back in, it is no longer damaged and okay to circulate; marking it as Available or to fill the next hold.

9. If an item needs repair, and the library plans on repairing it, should staff leave the status as Damaged or change it to Repair?

Again, this would be up to the individual library and their workflow. It doesn't do any harm leaving it as Damaged. Libraries can do either option if it works for them.

10. What if staff check-in another library's item as Damaged and the owning branch wants to bill the patron. Will the owning library be able to change the status to Go Lost?

When an item is marked as Damaged, the system removes the item from the patron record. If staff from the returning library can attach the patron info to the problem slip or staff from the owning branch can find the previous patron info, then staff at the owning branch can check the item back out to the patron and go through the [Lost and Damaged Procedure](#).

11. Could there be a pop-up that notifies, "Do you want to mark this item as damaged?" when you check the Damaged Item box so that items won't accidentally be marked?

There currently isn't a pop-up but OWLS can suggest it to TLC. Along with an option to disable the pop-up.

12. Will the Who Had It icon still show the last patron after an item is marked Damaged?

Yes. Marking the item as damaged will remove it from the current patron's account, but it will still keep that information in the Who Had It history.

13. Can staff check in damaged items as such, removing it from patron account and send it back to the owning library? Wouldn't this be confusing to the patron?

OWLS would prefer staff don't check in damaged items still checked out to a patron, but rather, leave it checked out and put a yellow problem slip in it for the owning library to decide. If it does happen, where an item is marked as damaged and sent back, then the owning library will just need to follow the [Lost and Damaged Procedure](#).

14. Is there criteria laid out for staff to follow on what is okay to mark as damaged from other libraries?

Typically, you would want to leave it up to the owning library and OWLS recommends leaving the item checked out to the patron and sending back with a yellow problem slip. It would be confusing to patrons to see items come off their account and then be added back on later as a bill. But if the item is meant to fill a hold for one of your patrons and you decide you don't want to fill the hold with the item, then you can mark it as Damaged so that the system will grab the next available item for the patron.

15. When a library gets a damaged item back and they decide it can circ, should staff be adding on a damaged sticker to the item?

If an item is returned to the owning library with a damaged status and the owning library decides it is a circable item, then staff should check the item back in and this will remove the damage status and the damaged note from the record. Staff can then add a sticker if they have them or staff can add in their own note to the item indicating it has "X" damage so that staff won't think future patrons caused the damage.

16. Is the added note for damage mentioned in the previous question, a pop-up note?

No. The system generated damaged note is not a pop-up. If staff want this damage to be known by staff each time it is scanned, staff should add in a "Charge/Discharge Note" with the free text indicating the damage. This is the only note that creates a pop-up at check-in/out.

17. What is the "Wander List?"

The "Wander List" is the same as the "Not Found" list in Connect. TLC just changed the name of it in the new update. Staff can also Withdraw or Check-in one or multiple items from this list.

18. Is it called the "Wander List" in CARL-X, too?

No. CARL-X doesn't have the same lists as Connect Staff does. Staff can certainly use the Report 17 – Items by Status to create a list of Damaged or Not on Shelf items. But there isn't a quick way to jump to this list as there is in Connect Staff.