The Selectors met to discuss proposed changes to the replacement process. We reviewed the timeline and form for requesting a refund.

All recommendations in Lora’s proposal were approved. Highlighted below.

Recommendations for changes to the Searching, Billed Item, and Withdrawal Processing

1) Shorten process for replacement/withdrawal searches to 6 months
   Pros – Allows selectors to identify materials for replacement more quickly
   Action items:
   a. Create list and clean up items with a status code “3.” Remove status from system (19 items)
   b. Communication procedures and timetables to all locations

2) Export and retain Fines Paid File annually.
   Pros – Eliminates need to retain paper Paid Fines materials (currently 7 years maintained) and refilling and maintenance times, retains information for payments made for a longer period of time, allows earlier removal of withdrawn records from the system
   Action items:
   a. Document process
   b. Create backfiles for earlier years
   c. Create backfile annually

3) Suppress missing items in MAIN locations in the catalog upon completion of search process.
   Pros – Suppresses from public view those items which are missing on a more regular timeframe, eliminates problems occurring from the need to recycle replacements which are not fulfilled or for paperwork that may be mishandled.
   Action items:
   a. Acquisitions will be sent the information on the appropriate Create List that was used by stacks manager to Acquisitions upon completion of search.

4) Remove withdrawn Lost & Paid, search items from catalog regularly
   Pros – removes around 7000 items from the catalog that have already been withdrawn; makes it easier for desk staff to perform search functions and to recognize valid collection items
   Action items:
a. Review items from before FY 2007/2008, create a list of items that are already suppressed or otherwise indicated as lost, discarded, etc. Appropriate items will be removed by Cataloging. Items not reviewed and suppressed will be returned to selector after the list has been sent to Cataloging for suppression.

b. In October of each year a list of items that are 3 years old with the appropriate suppress code and WD note will be gathered for removal from the catalog by cataloging (after order records are suppressed)

Additional related recommendations

5) Refunds will no longer be automatically given for Lost & Paid materials. Patron will receive a refund from one year to date of the payment upon request and review.
   Pros – removes need to add additional notes in item records, eliminates additional billing work and quicker turnaround of items that have been billed and paid for.
   Action items:
      a. Request form and procedures

Mary will add a note to the replacement form to remind selectors to review the record in the catalog for the most recent information.

Respectfully: mag