

Appendix 14: Recommended Maintenance Tasks

Holds-Related Maintenance Tasks	Recommended Frequency	Delivery Method
<u>Fill hold requests</u> – pick the hold requests for both your patrons and requests made by patrons from other libraries	Daily, weekends optional	Use LEAP – Utilities/Picklist Processing/Pending
<u>Unclaimed holds</u> – remove the items from your hold shelf when they are not picked up by the unclaimed date	Daily	Use LEAP – Utilities/Picklist Processing/Unclaimed
<u>Holds Alert Report by Branch</u> – can be used to check the number of hold requests against the number of copies owned; useful for collection development to know if you need additional copies of a particular title, and, for determining if the hold can be filled with a hardcover or other edition. If so place another hold and <u>group the holds</u> .	Weekly	Use Polaris – Utilities Reports and Notices Circulation – Holds Holds Alert Report by Branch
<u>Hindered Holds Report</u> – Lists your library patrons with hold requests that appear unfillable: 1) no items, 2) active for more than 4 months, 3) unclaimed at least 2 weeks. Review to see if the hold request can be filled with another copy in Main Library Alliance; if not, change to a JerseyCat request.	Monthly	Email sent to circ-xxx

Appendix 14: Recommended Maintenance Tasks (continued)

Item-Related Maintenance Tasks	Recommended Frequency	Delivery Method
<p>In-transit and Transferred Report – List Items that have had a Circulation status of In-Transit or Transferred to or from your library for more than 30 days. Check your shelf and request other involved libraries to check their shelf. If not found at either library, change the circulation status to MISSING within one month. If it is the last item in Main Library Alliance, notify the home library (or MCL if that was the pickup library) so they can place a JerseyCat request. The notified library should remove the hold or convert it to an ILL request.</p>	Monthly	Email sent to circ-xxx
<p>Create a List of Items Marked MISSING – necessary to periodically check the shelves for MISSING items to correct the status, then, proceed according to your library’s practice, for example, replace the title and/or withdraw the record.</p>	Monthly	Use LEAP – Item search
<p>Create a List of Items Marked In-Repair, Unavailable – verify item location to update these circulation statuses if the item is back on the shelf</p>	Monthly	Use LEAP – Item Search
<p>Change Holdable Status of New Items To comply with Main Library Alliance policy, you must change items to be holdable by all patrons once owned for 2 months.</p>	Monthly	Use LEAP – Item Search; bulk change
<p>Working with Long Lost Items - Review the Long Lost item report to withdraw items that have been Lost for an extended period of time.</p>	Quarterly	Email sent to circ-xxx

Appendix 14: Recommended Maintenance Tasks (continued)

Patron-Related Maintenance Tasks	Recommended Frequency	Delivery Method
Read all Main Library Alliance patron queries and reply as appropriate	Daily, weekends optional	Email sent to circ-xxx
Handle failed email notifications – manually notify patron and update contact information. See FAILED e-MAILS	Daily, weekends optional	Email sent to circ-xxx
Handle failed telephone notifications – attempt to manually notify patron and correct/update phone number. See FAILED CALLS .	Daily, weekends optional	Email sent to circ-xxx
OVERDUE AND BILL NOTICES on p. 13 in the Main Circulation Manual for more details	Weekly	Email sent to circ-xxx
Find patrons with incorrect information in phone number fields – necessary to remove the other characters in the phone number field so the Polaris Telephone Service (PTS) automated calls don't fail	Quarterly	Use Polaris – Patron Search
Locate Mismatched Patron Barcodes and Libraries	Quarterly	Use Polaris – Patron Search
Locate Mismatched Patron Statistical Class on Registration Records	Quarterly	Use Polaris – Power Search
Locate Patrons with Incorrect Expiration Dates – this is necessary to correct expiration dates greater than 1 year for patrons with Courtesy cards, MUF cards, and Open Borrowers	Quarterly	Use Simply Reports
Merging a Patron Record	As needed	Use LEAP (must login as circsup-xxx)
Deleting Dusty Patrons	Annually	Circulation AG Email from Main Office