The clean-up guidelines are used once a year to check shelves for materials that may have been returned, but not checked in and then clear items that are more than a year overdue from patron records. Please note that the report of items overdue may be run as often as time permits at the owning library. Reports are shared with other libraries only once a year during annual clean-up, to manage the workload for each library.

<table>
<thead>
<tr>
<th>OWNING (ITEM) LIBRARY TASKS:</th>
<th>BORROWING (PATRON) LIBRARY TASKS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search locally for all OhioLINK items lent that are 60 or more days overdue and check them in (see <strong>CREATING OVERDUES REPORT FOR LOCAL SEARCHING</strong>, p. 2)</td>
<td>Record the status of each item in your patrons’ records; search for the item locally (see <strong>BORROWING LIBRARY FOLLOW-UP PROCESS</strong>, p. 4)</td>
</tr>
<tr>
<td>Create and distribute lists of OhioLINK items lent that are 365 or more days overdue (see <strong>CREATING OVERDUES REPORT FOR DISTRIBUTION TO BORROWING LIBRARIES</strong>, p. 3)</td>
<td>For items still checked out to borrowers, create permanent $125 charges in the borrowers’ accounts (see <strong>BORROWING LIBRARY FOLLOW-UP PROCESS</strong>, p. 4)</td>
</tr>
<tr>
<td>Records details about the transaction in the item record, if local procedures require that. (see <strong>OWNING LIBRARY FOLLOW-UP PROCESS</strong>, p. 4)</td>
<td>Report back to the owning library (see <strong>BORROWING LIBRARY FOLLOW-UP PROCESS</strong>, p. 4)</td>
</tr>
<tr>
<td>Check in the item and mark it missing, according to local practice. (see <strong>OWNING LIBRARY FOLLOW-UP PROCESS</strong>, p. 4)</td>
<td></td>
</tr>
</tbody>
</table>
CREATING OVERDUES REPORT FOR LOCAL SEARCHING:

Owing library selects the Function **INN-Reach Reports**

Choose Report Type **Institutional Overdues**

Choose correct location selection for your library (In most cases this will be “All” for a single library or main library that distributes lists to all branch libraries).

Enter minimum number of days overdue to be included in the report (you can use whatever number you want for local searching, up to 365). No maximum number of days overdue is necessary. **Sort by Item Location & Call Number.**

Prepare the report

Print the report and distribute to all locations to search stacks following timetable in “calendar.” You may find it more convenient to “printing” to an email account and distribute via email. If you do not have the email printer as a print option, ask your Lead Implementer about adding it to your Sierra username or Millennium login.

Check in any items found in the stacks.
CREATING OVERDUES REPORT FOR DISTRIBUTION TO BORROWING LIBRARIES:

**Sierra process**

Owning library selects the Function INN-Reach Reports

Choose Report Type
**Institutional Overdues**

Choose correct location selection for your library (In most cases this will be “All” for a single library or main library that distributes lists to all branch libraries).

Enter 365 as the minimum number of days overdue to be included in the report. No maximum number of days overdue is necessary.

**Sort by Patron Home Library and Name.**

Prepare the report

Send reports to the PCIRC Contact at the patrons’ institutions.

PCIRC Contact List: [https://sites.google.com/site/pcirclist/Home](https://sites.google.com/site/pcirclist/Home)

We highly recommend “printing” to an email account and copying and pasting each library’s page into an email for distribution. This allows faster delivery of the lists around the state to the specific individuals who need them. It also makes it easy for the PCIRC contacts at the borrowing libraries to forward the lists within their institutions and to keep copies of their replies.

If you do not have the email printer as a print option, ask your Lead Implementer about adding it to your Sierra username or Millennium login.

[See below for an example of a message to include in your emails to the patrons’ libraries.]

**EXAMPLE OF TEXT TO INCLUDE IN THE EMAIL FROM THE OWNING LIBRARY:**

Hi! Below is our list of items checked out to your borrowers that are now 365 days overdue. Could you indicate their statuses by looking at the INN-REACH tab and the Fines Paid information in your patrons’ records? After you’ve returned the list to me we’ll be checking in the items and declaring them missing. If you need any information in the Virtual item record, be sure to record it before replying. If I’ve not heard back by MM/DD/YY, I’ll be moving forward with the reconciliation process and checking the items in. Thanks!

[Please keep in mind in setting your deadlines that there are a number of libraries with small PCIRC staffs that may need some extra time to complete the process.]
BORROWING LIBRARY FOLLOW-UP PROCESS:

Check the patron’s record for the virtual item. This may be on the INN-REACH tab, or it may only be represented as a PAID charge on the Fines Paid screen.

Record the status on the Institutional Overdues report.

If there’s any chance the item is mis-shelved in your library (statuses IN TRANSIT, OHIOLINK RECEIVED, and OHIOLINK RETURNED are likely candidates), check your own stacks for the items.

When the Owning Library receives your report, they will check in the item, which will remove it from your patron’s record. If the book is still checked out to your user, you will want to convert that checkout to a $125 charge, to retain the record of the money owed. Depending on your local practices, there are several options:

<table>
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<th>Process #1</th>
<th>Process #2</th>
<th>Process #3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check the item in. This will convert the existing $125 charge into a $50 billing fee.</td>
<td>Collect money for the $125 charge. This will record $125 in the Fines Paid record.</td>
<td>Waive the $125 charge. This will record a $125 waiver in the Fines Paid record.</td>
</tr>
<tr>
<td>Add a manual charge of $75.</td>
<td>Add a manual charge of $125, or bill the user $125 through their college/university account.</td>
<td>Add a manual charge of $125, or bill the user $125 through their college/university account.</td>
</tr>
</tbody>
</table>

The status in the virtual item changes to OhioLINK RETURNED. The item record at the owning library shows the item as OFF-CAMPUS and in transit home.

The status in the virtual item changes to OhioLINK RETURNED. The item record at the owning library still shows the item as checked out and OFF-CAMPUS.

Alert the Owning Library that the item has been billed and will not be returning home.

NOTE: Both of these methods will create misleading information in the FINES PAID file. Use the method that is more acceptable with your auditing practices.

OWNING LIBRARY FOLLOW-UP PROCESS:

Record any information about the transaction you wish to retain (e.g. the status at the borrowing library, the patron record number or borrowing library, the date, etc.) Many libraries use the item record’s NOTE field to store this information.

Check in the item. For items that are still checked out and billed at the borrowing library, you may wish to confirm that they have recorded all the information they need before checking in the item.

Give it a missing status in accordance with local practice (common status codes used are m, n, and $). Local practice may dictate withdrawing the item instead.
REMINDERS AND OTHER ISSUES:

Even though we are reconciling these transactions between libraries, patrons remain responsible for all lost items and are required to pay the replacement and processing fees.

There is no exchange of money between institutions; the borrowing library retains the replacement income for OhioLINK items lost by their users.

Items that do not show up at all on the borrowing libraries’ patron records may be broken holds, and the Owning library may need to submit a Service Commitment with Innovative to clear the virtual item.

If an item is returned after the virtual record is removed from the patron record, send the item to the owning institution with a note of explanation; the owning library may change status back to “available” and remove the note from item record.

If institutions do not respond to reports sent or questions asked in a timely way or by reasonable deadlines, owning libraries are free to alert the borrowing libraries that they are completing the reconciliation process.