

Special Orders Processing (LTS Procedure #33)

Scope: *This procedure outlines instructions for processing special orders in the Monographs Ordering Unit. This guideline should be used with much discretion, and only at the recommendation of the heads of the LTS Ordering and/or Receiving Units.*

Contact: [Masayo Uchiyama](#)

Unit: Acquisitions Ordering

Date last updated: 02/27/2024

Date of next review: February 2025

[Qualification for Special Orders](#)

[Placing Special Orders](#)

[Receiving Orders](#)

A. Qualification for Special Orders Special order materials may be a single monograph or groups of items such as foreign language videos or unique area or literature collections. These items typically:

1. Have very limited availability and are from a unique source
2. Are those whose information is hard to be reproduced if they are not input into FOLIO immediately
3. Are difficult to input without having the piece in-hand. E.g., the item is in a foreign language that none of the staff understands, or, there is limited /sketchy bibliographic information available
4. Need a record in FOLIO to facilitate the ordering and receiving activities, such as pre-payment

B. Placing Special Orders

1. Create a preliminary level instance record (encoding level = 5) for the item/items with a 245 and a 246 field.

Example:

245 |a Icelandic literature (144 titles) 246 |a Special Order

2. Create a holdings record with proper location.
3. Suppress both the instance and holding records.
4. Create a purchase order following the guidelines for regular materials.
5. Fax, phone or mail the purchase order as circumstances dictate. Make sure to ask vendor to:
 - quote the purchase order number on the invoice
 - clearly mark the package with: "SPECIAL ORDER" on the shipping label

C. Receiving Special Orders

Upon arrival, the materials are put in front of the queue of other materials to be received. The receiver should receive these items as soon as is reasonable and before receiving other more traditional materials.

1. Receive the items following the receiving guidelines for more traditional orders.
2. Pay the invoice following the payment guidelines for more traditional orders.
3. Use the existing record to process the item if possible and unsuppress it, updating it as appropriate.