

Return of a Monographic Title to Vendor (LTS Procedure #20)

Scope: This document outlines the procedures that the Monographs Receiving Unit, LTS follows when returning a monographic title to a vendor. The returning methods vary from vendor to vendor due to different business agreements. Judgement is needed in determining which method to use.

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Unit: Monographs Receiving

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A. Return without Permission

In the following situations an item is returned to the vendor automatically. No permission from the vendor is necessary. Please refer to Section [C](#) and [D](#) for exceptions.

- Error-in-shipment = Item supplied is not the item ordered.
- Cancellation = Order was cancelled at least one month prior to the invoice date the item was received/billed.
- Defective = Item supplied is in damaged or imperfect condition.
- Duplicate shipment = Vendor supplied the same item on the same purchase order a 2nd time.
- Overpricing = cost of item was over \$100 or 100% more than the price listed on the purchase order sent to vendor, and the selector rejects the item.
- Unwanted approval title = Item reviewed but not selected for the collection.

Process:

1. If the invoice is not yet paid and we do not expect anything in its place:
 - Receive the item, then generate a return letter
 - Return the item to vendor with the return letter
 - Line the entry off the invoice
 - Deduct the cost of the returned item from the total
 - Process the invoice at the new sum
 - Change the price to 0.00 on the purchase order
 - Add appropriate notes in the POL "Receiving note" field

Receiving note



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2. If the invoice has been paid and we do expect a book to come in its place [i.e. an error in shipment or a defective item]:

- Generate a return letter
- Return item to vendor with return letter
- Line the entry off the invoice
- Deduct the cost of the returned item from the total
- Process the invoice at the new sum
- Change the price to 0.00 on the P.O.
- Add appropriate notes in the POL "Receiving note" field

Receiving note



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3. If the invoice is paid:

- Request a credit from vendor via e-mail.
- Process in FOLIO as a credit (ex: -10.00)
- Change the price to 0.00 on the purchase order

4. If the invoice is paid and a defective item is discovered:

- o Communicate with vendor to request a no-charge replacement
- o Inquire with the vendor whether the defective copy needs to be returned
- o If a no-charge replacement is not available, arrange a credit from the vendor
- o Proceed according to instructions in [b](#) or [c](#) above

B. Return with Permission

This process applies to items that cost more than \$50. For items that cost \$50 or less, refer to Section [C](#).

In the following situations permission must be obtained from the vendor before returning the item. Please refer to Section [C](#) and [D](#) for exceptions.

1. Unwanted duplicate = An item duplicates an existing library holding
2. Late Cancellation = Library's cancellation was sent less than a month prior to the invoice date of the supplied item

Process:

Communicate with vendor to request permission to return the item to vendor.

1. If permission is granted, follow appropriate instructions described in Section A.
2. If permission is denied:
 - Pay for the item
 - If item cost is more than \$100, give to unit supervisor
 - If item cost is less than \$100, place it on the book sale truck in the Gifts Unit

C. Exceptions

Items that match the following categories should not be returned regardless of whether they fall into the categories described in Section A or B. Please refer to Section [D](#) for special cases.

1. An item costs \$50 or less and its supply was caused by a library error
2. An item was received on an established Blanket Order Plan

Process:

Annotate the flyer with "book sale" note and place it on the book sale truck in the Gifts Unit. Items with Echols flyers should be placed on the outgoing mail shelf in LTS.

D. Special Cases

Books discovered to be defective after they have been cataloged will need to be withdrawn from the CUL collection before further disposition. Consult the Invoiced Receipt Unit supervisor for proper action. (The vendor may require the return of the defective book. In this case proper withdrawal procedures should be completed before returning.)
