

Claiming Missing or Overdue Serials (LTS Procedure #156) [FOLIO]

Scope: The document below outlines the procedures that Library Technical Services serials staff follow when claiming a missing or overdue serial.

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Unit: Serials Management

Date last updated: Jan. 2023

Date of next review: Jan. 2024

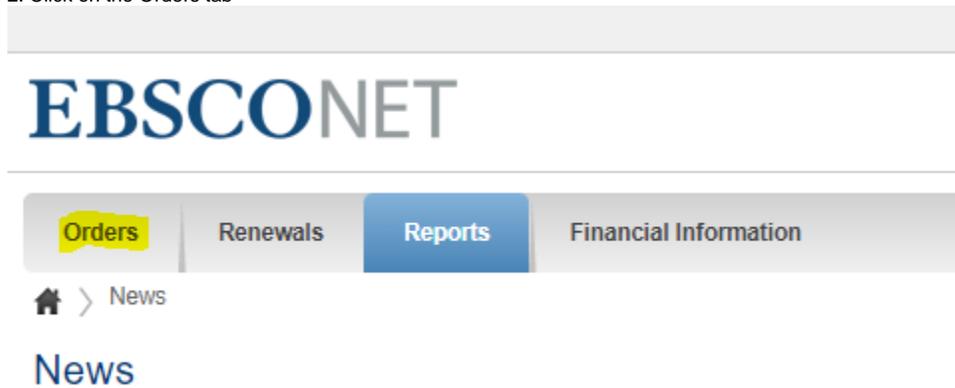
Preliminary information: Claims will often be sent from selectors or serials receivers to the LTSSER email list, or a note will be placed in the inbox of the Serials Claiming Coordinator's desk. Staff who pay invoices or check in items will also notice items that need claiming, and will bring them to the attention of the Serials Claiming Coordinator by email. EBSCO and Harrassowitz claims can be submitted using their online portals. Claims can also be submitted by email, and when necessary, by phone.

Claiming is necessary if:

- a later edition of a serial is checked in before receiving a previously published issue (e.g. vol. 23, no. 2 has just been received, but we never received vol. 23, no. 1)
- receipt of a serial has completely lapsed (this is usually identified when processing a renewal invoice)

Submitting a claim using EBSCOnet

1. Sign into EBSCOnet (ebsonet.com)
2. Click on the Orders tab



3. Under *Advanced search*,

change *Current subscriptions* to *All years*, in order to bring up the full range of our subscription history

Orders

Quick Search Advanced Search

Search All Lin

For

And

4. It's easiest to search for a subscription by title or ILS number (our PO# in FOLIO)

Orders

Quick Search | Advanced Search

Search: All Accounts | All Years

For: Title Name | sa fruit journal

And: Invoice Number

All Orders Online Titles

Limit search to this location

Search Clear

Orders

Quick Search | Advanced Search

Search: All Accounts | All Years

For: ILS Number | 2AFG0251a

And: Invoice Number

All Orders Online Titles

Limit search to this location

Search Clear

5. Clicking *Start Date* will arrange the subscription years in descending order (you can also click the headers on any of the columns to sort in various ways)

	Title Name	Order Status	Start Date	Format	Publisher
	All	All	All	All	All
▶	SA Fruit Journal Order Number: C1596298 Fund Code: 1010 ILS Number: 2AFG0251A	Active	04/01/2023	Print	DECIDUOUS FRUIT PRODUCER TRUST
▶	SA Fruit Journal Order Number: C1596298 Fund Code: 1010 ILS Number: 2AFG0251A	Active	04/01/2022	Print	DECIDUOUS FRUIT PRODUCER TRUST
▶	SA Fruit Journal Order Number: C1596298 Fund Code: 1010 ILS Number: 2AFG0251A	Expired	04/01/2021	Print	DECIDUOUS FRUIT PRODUCER TRUST
▶	SA Fruit Journal Order Number: C1596298 Fund Code: 1010	Expired	04/01/2020	Print	DECIDUOUS FRUIT PRODUCER TRUST

6. You'll want to click on the year that the issue you're claiming falls under. For example, if you're claiming the 2022 Apr./May issue, you'll want to click on the subscription that begins 4/1/22. Click on the caret on the far left-hand side of the screen next to this subscription.

	SA Fruit Journal Order Number: C1596298 Fund Code: 1010 ILS Number: 2AFG0251A	Active	04/01/2022	Print	DECIDUOUS FRUIT PRODUCER TRUST
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Order Details | Analysis/Holdings/Usage | Order History | Customer Notes (0)

General

Title Name: [SA Fruit Journal](#)
 Title Status: Active
 Title Notes: Formerly/ Deciduous Fruit Grower/ All Except South Africa
 Title Number: 791-735-798
 Format: Print
 ISSN: 1683-4577
 Publisher Name: [DECIDUOUS FRUIT PRODUCER TRUST](#)

Account Number: TN57135-04
 Subscriber Code: 01
 Subscriber Name: [E-RESOURCES AND SERIALS](#)
 Subscriber Address: CORNELL UNIVERSITY LIB
 110 OLIN LIBRARY
 ITHACA, NY 14853

Order Number: C1596298
 Quantity: 1
 Order Type: Renewal
 Start/Expiration Date: 04/01/2022 - 03/31/2023
 Term: 1 Year(s)
 Order Status: Active
 Purchase Order Number: .
 Fund Code: 1010
 ILS Number: 2AFG0251A
 Total Cost: 135.00 USD

Total Cost may not include taxes or service fees, if applicable.

Billing Details

Document Date	Document Number	Reason	Coverage	Amount	Currency	Tax Total	Total Cost
12/03/2021	9230953			135.00	USD	0.00	135.00
Totals				135.00		0.00	135.00

Other Orders
[2023](#) [2022](#) [2021](#) [2020](#) [2019](#)
 Publisher Policies
 Order F
 Additional Information
 Links
[Volume/Issue Information](#)
[Library of Congress](#)
[National Library of Medicine](#)

7. Click on *Submit service request* on the far right-hand side of the screen

01 - E-RESOURCES AND SERIALS	135.00	USD
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Submit Service Request
Modify Order
Cancel this Order

[2015](#) [All Years](#)

nly.

8. Under *Type*, select *Claim for print*

Submit Service Request

Order Details

Title Name: SA Fruit Journal

Order Number: C1596298

Order Start Date: 04/01/2022

Term: 1 Year(s)

Account Number: TN57135-04

Subscriber: 01 - E-RESOURCES AND SERIALS

Fund Code: 1010

ILS Number: 2AFG0251A

Type:

Select...	▼
Select...	
Claim for Print	
Ask a Question	

9. It's easiest to submit claims using the checkboxes next to the issues if EBSCOnet gives you this option. If not, type in the issue(s) you're missing. Click *Submit* when done.

Title Name: SA Fruit Journal
Order Number: C1596298
Order Start Date: 04/01/2022
Term: 1 Year(s)
Account Number: TN57135-04
Subscriber: 01 - E-RESOURCES AND SERIALS
Fund Code: 1010
ILS Number: 2AFG0251A

Type:

Claim for Print ▼

Please enter the volume/issue you are claiming or choose from the Volume/Issues listed below. ✕

Claim Details

Reason for Claim:

Listed Issues Not Received ▼

Claim Number:

1 ▼

Comments to Publisher:

Volume/Issue Information

Volume/Issue Claimed:

or

Description	Volume	Issue	Issue Date	Dispatched by Publisher	Claim
DEC-JAN (2022)			12/01/2022	11/01/2022	<input type="checkbox"/>
(2022)			10/01/2022		<input type="checkbox"/>
(2022)			08/01/2022		<input type="checkbox"/>
(2022)			06/01/2022		<input type="checkbox"/>
(2022)			04/01/2022		<input checked="" type="checkbox"/>
FEB-MAR (2022)			02/01/2022	11/01/2022	<input type="checkbox"/>

Close

Submit

9. Previously claimed issues should appear under the Claim history tab of the year that the issue(s) fall under.

▼	SA Fruit Journal Order Number: C1596298 Fund Code: 1010 ILS Number: 2AFG0251A	Expired	04/01/2021	Print	DECIDUO
Order Details	Claim History	Analysis/Holdings/Usage	Order History	Service Requests	Customer Notes (0)
Claim Date	Claim Number	Claim Reason	Claim Status	Comments	Publisher Reply
10/05/2022	1	Listed Issues Not Received	Sent to Publisher	Vol. 20 Pt. 1-2 (2021) vol. 20 Pt. 5 (2021)	
12/02/2021	1	E-Mailed Publisher.	Sent to Publisher	Vol. 20 Pt. 1-2 (2021)	
▶	SA Fruit Journal Order Number: C1596298	Expired	04/01/2020	Print	DECIDUO

10. To reclaim something that was previously claimed, click on the Claim date, and select Reclaim

Claim Details - SA Fruit Journal

← Return to Search Results

Reclaim

Received

New Claim

Claim Notes

Claim Details

Volume/Issue Detail

Order Details

Title Name: [SA Fruit Journal](#)

Title Status: Active

Title Notes: FORMERLY/ DECIDUOUS FRUIT GROWER/ ALL EXCEPT SOUTH AFRICA

Publisher Name: [DECIDUOUS FRUIT PRODUCER TRUST](#)

Volume/Issue Claimed: Vol. 20 pt. 1-2 (2021)

Vol. 20 pt. 5 (2021)

Date claimed: 10/05/2022

Reason for Claim: Listed Issues Not Received

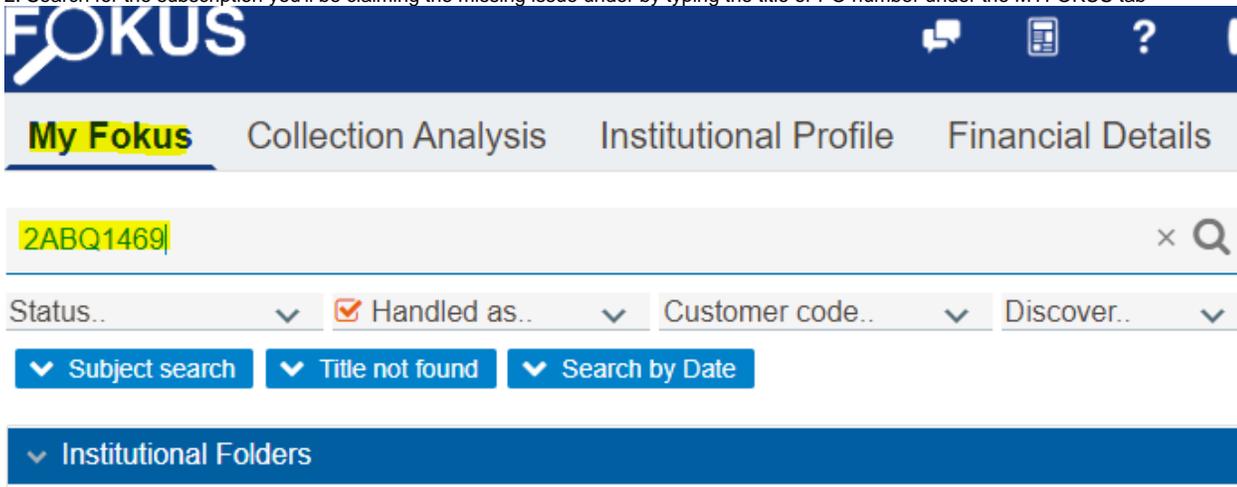
Claim Number: 1

Claim Status: Sent to Publisher

 [Contact Us](#)

Submitting a claim using FOKUS (Harrassowitz)

1. Sign into the Harrassowitz database FOKUS (harrassowitz.de/OHFokusWeb)
2. Search for the subscription you'll be claiming the missing issue under by typing the title or PO number under the MYFOKUS tab



The screenshot shows the FOKUS database interface. At the top, the 'FOKUS' logo is visible. Below it, there are navigation tabs: 'My Fokus' (highlighted), 'Collection Analysis', 'Institutional Profile', and 'Financial Details'. A search bar contains the text '2ABQ1469'. Below the search bar, there are several dropdown menus: 'Status..', 'Handled as..' (with a checked checkbox), 'Customer code..', and 'Discover..'. There are also three buttons: 'Subject search', 'Title not found', and 'Search by Date'. At the bottom, there is a blue bar with the text 'Institutional Folders'.

3. Find the active subscription from the list of results and click the arrow next to the subscription on the right-hand side of the screen

My Fokus Collection Analysis Institutional Profile Financial Details Approval Plans Renewals

2ABQ1469 × Q Default ?

Status.. Handled as.. Customer code.. Discover.. Fuzzy search

Subject search Title not found Search by Date

Refine result ? << 1 result (1 option) Sort View Export

Order status
Customer code
Fund
Language
Medium
Publication type
Publication status
Country of origin
Publisher
Provider
Frequency
NLM title abbreviation
LC class

Check / uncheck Checked titles: 0 Estimated value: EUR 0.00
Price not available for 0 titles

Subs Scandinavian Economic History Review - 0358-5522

Routledge Activity

	Activity status	Volume / Year	PO / Fund / SNA	Additional title information	ISSN / Medium	Price	Publication status
<input type="checkbox"/>	active order 24-SER-TAF	2013 - 2023	SNA: 96402017-0-0 PO No: 2ABQ1469 Fund: 400	journal license print incl. site- wide online access	0358-5522 print incl. online	USD 201.00 (for 24-SER-TAF / 54619)	available

<< < 1 > >> 25

4. Click *Claim* followed by *Claim Print*

My Fokus Collection Analysis Institutional Profile Financial Details Approval Plans Renew

< Back to search results

Subs

Claim Print Report Access Problem

Cancel Ask a Q Order Request

Title Details
Title: Scandinavian Economic History Review
Additional Title Information: journal license print incl. site-wide online access
Publisher: Routledge Journal Subscriptions
Publication Status: available (Available for order)
ISSN-L: 0358-5522
Medium: print incl. online
Frequency: 3 x a year (3 issues per year)

Publisher's Price Details
2023: USD 201.00 (for 24-SER-TAF / 54619)
2022: USD 224.54 (for 24-SER-TAF / 54619)
2021: USD 218.00 (for 24-SER-TAF / 54619)

PO number: 2ABQ1469
Fund: 400
Customer Code: 24-SER-TAF / 54619
HAR Order ID (SNA): 96402017-0-0

5. Type the year or date of the issue you are claiming, along with the vol., no., and/or part if applicable. A claim reason must be selected from the drop-down list. Click submit claim.

Claim print issue

Publisher's Claim Restrictions: Claim missing issues within 6 months after publication

Issues claimed

	Year or Date		Vol.	No.	Part	Claim reason
Start	2022		70	2		Skipped issues
End						

Urgent

Urgent

Information for HARRASSOWITZ

Please only use this field for information that cannot be entered above.

Submit claim

Discard

How to mark a serial issue as claimed in FOLIO

1. From the Receiving app, search for the serial needing to be claimed by title or PO#
2. Click *Actions* *Add Piece* from the *Expected* field

Game & fish east.

▼ Title information

^ POL details

POL number 126814-1	Expected receipt date -	Receiving workflow mann S Shelf > combin from N B-1935 10xyr(2
Vendor EBSCO/M	Material supplier -	Rush <input type="checkbox"/>
Requester -	Receiving workflow Independent order and receipt quantity	

Actions

+ Add piece

Show columns

- Caption
- Copy number
- Enumeration
- Chronology
- Comment
- Piece format
- Expected receipt date
- Request

^ Expected

Actions ^

The list contains no items

3. In the caption field of the *Add piece* box, type the enum./chron. of the issue(s) you have claimed followed by a brief explanation of how you submitted the claim with your initials followed by the date (ex. *JC claimed via ebsconet 9/7/22*)

Add piece

Caption <input type="text" value="v. 42, no. 7 (2022 Sept.)"/>	Copy number <input type="text"/>
Enumeration <input type="text"/>	Chronology <input type="text"/>
Piece format * <input type="text" value="Physical"/>	
Expected receipt date <input type="text" value="MM/DD/YYYY"/>	Comment <input type="text" value="JC claimed via <u>ebsconet</u> 1/18/23"/>
Order line locations Mann (mann)	Supplement <input type="checkbox"/>
Name (code) <input type="text" value="Mann (mann)"/>	
Location look-up	

Create another

4. Click *Save & close*. The claimed issue will remain in the Expected field until it's received.

NOTE: If reclaiming a second or third time, add a note to the beginning of the comments field indicating how many claims have been submitted (ex. *2x claim sent via ebsconet. JC 1/18/23*)

Add piece

Caption

v. 42, no. 7 (2022 Sept.)

Copy number**Enumeration****Chronology****Piece format ***

Physical

Expected receipt date

MM/DD/YYYY

**Comment**

2x claim sent via [ebsonet](#) 1/18/23. JC claimed via [ebsonet](#) 9/7/22

Order line locations

Mann (mann)

Supplement**Name (code)**

Mann (mann)

[Location look-up](#)

Cancel

Create another

Quick receive

Save & close

Notes on following up and reclaiming if necessary

1. It is up to the discretion of the claimer to determine how they would like to keep track of their claims. This can be done in various ways, such as holding on to print outs until a claim is resolved, keeping email folders of open claims and resolved claims, maintaining a spreadsheet, or a combination of all of these.
2. As a general rule, an item(s) should be reclaimed if we still do not have the material by 6 weeks for U.S. vendors and 2 months for foreign vendors.
3. If we have not yet received an item(s) after 3 claiming attempts, it's appropriate to give up on the claim. It should be resolved internally using the following steps:
 - a. Check the item(s) in using the "Quick Check-In" button and edit the issue with a brief note explaining why we did not receive it. A typical note reads "NA" after the issue or "not rec'd."
 - b. Hit the "Display in OPAC" button to make sure it reads "No" in the "Display in OPAC" column.
 - c. Write a brief, private note (delimiter x) on line 852 in the holdings record of cataloging (e.g. "v. 23, no. 1 NA").

Helpful Customer Service / Vendor Contacts

Ars Polona

Contact: Hanna Prusinska
Email: hanna.prusinska@arspolona.com.pl

Ebsco

Contact: Lindsey Wood (rep)
Email: l.wood@ebSCO.com
Online portal: <https://www.ebSconet.com/>

Harrassowitz

Contact: General customer service department
Email: service@harrassowitz.de
Online portal: harrassowitz.de/OHFokusWeb

Amalivre

Contact: Guita Samiinia
Email: guita.s@amalivre.fr

Nardecchia

Email: periodicals@nardecchia.it

Casalini

Contact: Stella Di Vincenzo
Email: stella.divincenzo@casalini.it

Yankee

Contact: Joanne Franklin or Chuck Eastman
Email: JFranklin@ebSCO.com
ChuckEastman@ybp.com