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.

Contact: Joanna Cerro

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 (ebsconet.com)
- 2. Click on the Orders tab

EBSCONET

Orders	Renewals	Reports	Financial Information
♠ > News			
News			

3. Under Advanced search,

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

Orders

Quick Se	earch Advanced Search		
Search	All Accounts	✓ All Years ✓	O All
For	Title Name	✓	
And	Invoice Number	<	
		Search Clear	

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

Quick Se	earch Advanced Search		
Search	All Accounts	✓ All Years	All Orders Online Titles
For	Title Name	✓ sa fruit journal	Limit search to this location
And	Invoice Number	~	
		Search Clear	

Orders

Quick Se	earch Advanced Search		
Search	All Accounts	✓ All Years ✓	All Orders Online Titles
For	ILS Number	✓ 2AFG0251a	Limit search to this location
And	Invoice Number	▶	
		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
0	SA Fruit Journal Order Number: C1596298 Fund Code: 1010 ILS Number: 2AFG0251A	Active	04/01/2023	Print	DECIDUOUS FRUIT PRODUCER TRUST
0	SA Fruit Journal Order Number: C1596298 Fund Code: 1010 ILS Number: 2AFG0251A	Active	04/01/2022	Print	DECIDUOUS FRUIT PRODUCER TRUST
0	SA Fruit Journal Order Number: C1596298 Fund Code: 1010 ILS Number: 2AFG0251A	Expired	04/01/2021	Print	DECIDUOUS FRUIT PRODUCER TRUST
0	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.

0	SA Fruit Jo Order Nu Fund Coo ILS Numb	<u>urnal</u> mber: C1596298 le: 1010 per: 2AFG0251A		A	ctive		04/01/2022		Print	DECIDUOUS FRUIT PRODUCER TRUST		
Order	Details /	Analysis/Holdings/Usage	Order Histo	ory Cus	stomer Note	es (0)						
Ge	Pu Pu	Title Name: S Title Status: A Title Notes: Fr Title Number: 7 Format: P ISSN: 10 Publisher Name: D Subscriber Admess: C Subscriber Address: C Subscriber Address: C Quantity: 1 Order Number: C Quantity: 1 Order Type: R Start/Expiration Date: 0 Term: 1 Order Status: A rchase Order Number: . Fund Code: 11 ILS Number: 2 Total Cost: 1 R	A Fruit Journal ctive prmerly/ Decide 1-735-798 1-735-798 2-757 2-757 2-757 1-7577 1-7577 1-7577 1-7577 1-7577 1-7577 1-7577 1-7577 1	uous Fruit RUIT PRO AND SEF TERSITY L RY 353 31/2023 not include	Grower/ All DUCER TF RIALS JB	I Except Sou RUST	if applicable.				Other Orders 2023 2022 2021 Publisher Policies Additional Informa Links <u>Volume/Issue Info</u> Library of Congres National Library of	2020 2 Order F ttion ss f Medicine
D	ocument Dat	e Document Number	Reason C	overage	Amount	Currency	Tax Total	Total Cost				
12	2/03/2021	9230953			135.00	USD	0.00	135.00				
				Totals	135.00		0.00	135.00				

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

	01 - E-RESOURCES AND SERIALS	135	i.00 USD
	Submit Service Request	Modify Order	Cancel this Order
<u>2015</u> nly.	<u>All Years</u>		

8. Under Type, select Claim for print

Submit Service Request

Order Details

Ask a Question

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... Claim for Print

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 S ubmit when done.

Title N	lame: SA F	Fruit Journal									
Order	Number: (C1596298									
Order	Start Date	: 04/01/2022									
Term:	1 Year(s)										
Accou	int Numbe	er: TN57135-04									
Subso	riber: 01 -	E-RESOURCES AN	ID SERIALS								
Fund	Code: 101	0									
ILS Nu	umber: 2A	FG0251A									
Type:	fan Dalat - s										
Claim	for Print	•									
	Please	enter the volume/iss	ue you are cla	aiming or choose from t	he V	/olume/Issues liste	d below.			×	
Claim [Details										
Reaso	n for Cla	IM: t Received		~							
Listed	Issues No	Received		·							
Claim 1 ✔	Number:										
Comm	ents to F	Publisher:									
Values		farmatian									
Volume	e/Issue in e/Issue (Claimed:									
or Des	cription	Volume Issue	Issue Date	Dispatched by Dublis	hor	Claim					
DEC		Volume 1350e	12/01/2022	11/01/2022							
DEC-J/	AN (2022)		12/01/2022	11/01/2022							
(2022)			10/01/2022								
(2022)			08/01/2022								
(2022)			06/01/2022								
(2022)			04/01/2022								
FEB-M	AR (2022)		02/01/2022	11/01/2022							
									Close	Submit	
Provid	nusly clair	med issues shou	ld annear i	inder the Claim his	tory	y tab of the year	that the iss	sue(s) fall un	der		
	SA Frui	t lournal			lory	Expired		04/01/2021		Print	DECIDU
\checkmark	Order	Number: C1596	298			Expired		04/01/2021			DEGIDO
	Fund	Code: 1010									
	ILS N	umber: 2AFG025	51A								
Order	Details	Claim History	Analys	is/Holdings/Usage		Order History	Service I	Requests	Customer Notes	6 (0)	
Clai	im Date	Claim Number	Cla	aim Reason	(Claim Status	Com	ments	Publisher Reply		
10/0	5/2022	1	Listed Is:	sues Not Received	Se	ent to Publisher	Vol. 20 Pt.	5 (2021)			
<u>12/0</u>	2/2021	1	E-Mailed	Publisher.	Se	ent to Publisher	Vol. 20 Pt.	1-2 (2021)			
0	SA Frui	t Journal				Expired		04/01/2020		Print	DECIDU
	Order	Number: 04506	200								

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

Claim Details - SA Fruit Journal

← Return to S	Cearch Results Reclaim Received New Claim Claim Notes
Claim Details	Volume/Issue Detail Order Details
Volu	Title Name: <u>SA Fruit Journal</u> Title Status: Active Title Notes: FORMERLY/ DECIDUOUS FRUIT GROWER/ ALL EXCEPT SOUTH AFRICA Publisher Name: <u>DECIDUOUS FRUIT PRODUCER TRUST</u> me/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 subscrip	otion you'll be claiming the missin	ng issue under by typing t	the title or PO number	r under th	e MYFOKUS ta	ab
FOKUS	5			•		?
My Fokus	Collection Analys	sis Institutio	onal Profile	Fin	ancial D	etails
2ABQ1469						×Q
Status	✓ ✓ Handled as	s 🗸 Custo	omer code	\sim	Discover	~
✓ Subject search	h V Title not found	 Search by Date 	e			
✓ Institutional F	olders					

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

	Collect	ion Ar	nalysis	Institutional	Profile	Financi	al Details	Approv	/al Plans	Renewa	ls
2ABQ1469							×Q	Default	~		0
Status	 ✓ 	Hand	led as	✓ Custome	r code	✓ Disco	over 🗸	🗖 Fuzz	zy search		
✓ Subject search	h 🗸 Title	e not fou	und 🗸 S	earch by Date							
Refine result	3	« 1 res	sult (1 opti	on)					▼ Sort ▼	View 🔽 🗸 I	Export
Order status					~ ~ ×	: 1 ≯	» 25 ×				
Customer code	Ð			Check / uncheck	c Chec	ked titles: 0			Estimated value	EUR 0.00	
Fund		=		oneck/ uneneci	(0.100.				Price not availab	ble for 0 titles	;
Language		69	Sconding	vian Economia I	Jiston, Dovi	02501	5500				
Medium		Subs	Scanuina	VIAIT ECOTOMIC F	IISTOLA KEA	ew - 0506-3	0022				
Publication type	e		Routledge Activity	9							
Publication stat	itus	~		Activity status	Volume /	PO / Fund /	Additional title	ISSN / Modium	Price	Publicatio	n
Country of original	lin			active order	2013 - 2023	SNA:	journal license	0358-5522	USD 201.00 (for	available	
 Publisher Provider 				24-SER-TAF		96402017-0- 0	print incl. site- wide online	print incl. online	24-SER-TAF / 54619)		-
 Frequency 				1		PO No: 2ABQ1469	access				
 NI M title abbre 	eviation					Fund: 400					
					~ ~ ~ ~	1 1	25 -				
LC class							23 •				
LC class											
 LC class 4. Click <i>Claim</i> follow 	wed by <i>Cla</i>	im Prin	t Analysi	e lestituti	anal Dra	file Fi	annoial Dat		Approval	lana	Deneu
 LC class 4. Click <i>Claim</i> follow My Fokus 	wed by <i>Cla</i> Colle	<i>im Prin</i> ction	^t Analysi	s Institutio	onal Pro	file Fir	nancial Det	ails	Approval P	Plans	Renew
 LC class Click Claim follow My Fokus Back to search 	wed by <i>Cla</i> Colle ch results	<i>im Prin</i> ction	^t Analysi	s Institutio	onal Pro	file Fir	nancial Det	ails Claim	Approval P	lans	Renew Ask a Q
 LC class Click Claim follow My Fokus Back to searce Title Datails 	wed by <i>Cla</i> Colle ch results	im Prin ction	^t Analysi	s Institutio	onal Pro	file Fir	nancial Det	ails Claim Print	Approval P	Plans Cancel Order	Renew Ask a C Reques
 LC class Click Claim follow My Fokus Back to search Title Details Title: Scandinay 	wed by <i>Cla</i> Colle ch results	im Prin ction	t Analysi History Re	s Institutio	onal Pro	file Fir	nancial Det	ails Claim Print	Approval P	Plans Cancel Order	Renew Ask a Q Reques
 LC class Click Claim follow My Fokus Back to search Title Details Title: Scandinav Additional Title 	wed by <i>Cla</i> Colle ch results vian Econ	im Prin ction omic I	t Analysi History Re ournal lice	s Institutio	onal Pro	file Fir	nancial Det	ails Claim Print rt Access	Approval P	Plans Cancel Order	Renew Ask a C Reques
 LC class Click Claim follow My Fokus Back to searce Title Details Title: Scandinav Additional Title Publisher: Route 	wed by <i>Cla</i> Colle ch results vian Econ e Informa itledge Jo	im Prin ction omic F tion: j	t Analysi History Re ournal lice Subscripti	s Institutio eview ense print incl. s ons	onal Pro	file Fir	nancial Det ubs ss	ails Claim Print rt Access	Approval P	Plans Cancel Order	Renew Ask a G Reques
 LC class Click Claim follow My Fokus Back to search Title Details Title: Scandinav Additional Title Publisher: Routh Publication State 	wed by <i>Cla</i> Colle ch results vian Econ e Informa itledge Jo atus: avai	<i>im Prin</i> ction omic F tion: j urnal S lable	t Analysi History Re ournal lice Subscripti	s Institutio eview ense print incl. s ons	onal Pro	file Fir	nancial Det ubs claim ss PO nu Eund	ails Claim Print rt Access mber: 2	Approval P c s Problem ABQ1469	Plans cancel Order	Renew Ask a C Reques
 LC class Click Claim follow My Fokus Back to search Title Details Title: Scandinav Additional Title Publication State (Available for organization state) 	wed by Cla Colle ch results vian Econ e Informa itledge Jo atus: avai der)	im Prin ction omic F tion: j urnal S lable	t Analysi History Re ournal lice Subscripti	s Institutio eview ense print incl. s ons	onal Pro	file Fir	nancial Det ubs ss PO nu Fund: Custor	ails Claim Print rt Access mber: 2 400 /	Approval P c s Problem ABQ1469	Plans cancel Order	Renew Ask a G Reques
 > LC class 4. Click Claim follow My Fokus < Back to search Title Details Title: Scandinav Additional Title Publication State (Available for order ISSN-L: 0358-56 Medium: print in 	wed by <i>Cla</i> Colle ch results vian Econ e Informa itledge Jo atus: avai der) 5522 ncl. opline	<i>im Prin</i> ction omic F tion : j urnal S lable	t Analysi History Re ournal lice Subscripti	s Institutio eview ense print incl. s ons	onal Pro	file Fin	nancial Det ubs ss PO nu Fund: Custor HAR C	ails Claim Print rt Access mber: 2 400 ~ mer Cod	Approval P c s Problem ABQ1469 le: 24-SER-T (SNA): 96402	Plans Cancel Order AF / 5461 2017-0-0	Renew Ask a C Reques
 LC class Click Claim follor My Fokus Back to search Title Details Title: Scandinav Additional Title Publication State (Available for ordinal State) ISSN-L: 0358-55 Medium: print in Frequency: 3 x 	wed by Cla Colle ch results vian Econ e Informa itledge Jo atus: avai der) 5522 ncl. online a vear	im Prin ction omic F tion: j urnal S lable	t Analysi History Re ournal lice Subscripti	s Institutio eview ense print incl. s ons	onal Pro	file Fir	nancial Det Libs Claim Repo PO nu Fund: Custor HAR C	ails Claim Print rt Access mber: 2 400 / mer Cod order ID	Approval P C s Problem ABQ1469 He: 24-SER-T (SNA): 96402	Plans cancel Order FAF / 5461 2017-0-0	Renew Ask a G Reques
 > LC class 4. Click Claim follor My Fokus < Back to searce Title Details Title: Scandinav Additional Title Publication State (Available for order of the searce) ISSN-L: 0358-55 Medium: print in Frequency: 3 x (3 issues per yearce) 	wed by <i>Cla</i> Colle ch results vian Econ e Informa itledge Jo atus: avai der) 5522 ncl. online c a year ear)	im Prin ction omic H tion: j urnal S lable	t Analysi History Re ournal lice Subscripti	s Institutio	onal Pro	file Fir	nancial Det Libs Ss PO nu Fund: Custor HAR C Publis	ails Claim Print rt Access mber: 2 400 / mer Cod Order ID	Approval P c s Problem ABQ1469 le: 24-SER-T (SNA): 96402 rice Details	Plans Cancel Drder AF / 5461 2017-0-0	Renew Ask a Q Reques
 LC class Click Claim follor My Fokus Back to search Title Details Title: Scandinav Additional Title Publication State (Available for ordinal State) ISSN-L: 0358-55 Medium: print in Frequency: 3 x (3 issues per yearch) 	wed by Cla Colle ch results vian Econ e Informa titledge Jo atus: avai der) 5522 ncl. online c a year ear)	im Prin ction omic I tion: j urnal S lable	t Analysi History Re ournal lice Subscripti	s Institutio	onal Pro	file Fir	nancial Det Libs Ss PO nu Fund: Custor HAR C Publis 2023: 2023:	ails Claim Print rt Access 400 ~ mer Cod order ID Sher's Pi USD 207	Approval P a Problem ABQ1469 He: 24-SER-T (SNA): 96402 rice Details 1.00 (for 24-S	Plans cancel Order FAF / 5461 2017-0-0 SER-TAF /	Renew Ask a C Reques

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 dropdown list. Click submit claim.

Publisher'	's Claim Restrictions	: Claim miss	ing issues	within 6 mor	ths after publication		
Issues cl	aimed						
Start End	Year or Date	Vol. <mark>70</mark>	No. 2	Part	Claim reason Skipped issues	*	
Urgent	t						
– Informati Please only u	ion for HARRASSOW	IITZ at cannot be ente	ered 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			Actions	
POL number	Expected receipt date	Receiv	+ Add piece	
126814-1	-	mann S Shelf >	Show columns	
		combir from N	Caption	
		B-1935	🗹 Copy number	
		10xyr(2	Enumeration	
Vendor	Material supplier		Chronology	
EBSCO/M			☑ Comment	
Requester	Receiving workflow	Rush	Piece format	
-	Independent order and receipt quantity		S Expected receipt date	
			Request	
∧ Expected			Actions •	

^ Expected

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		Copy number		
v. 42, no. 7 (2022 Sept.)				
Enumeration		Chronology		
Piece format*				
Physical		*		
Expected receipt date		Comment		
MM/DD/YYYY	Ë	JC claimed via <u>ebsconet</u> 1/18/23		
Order line locations		- Supplement		
Mann (mann)				
Name (code)				
Mann (mann)	•			
Location look-up				
Cancel	□ c	reate another Quick receive Save & close		

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		Copy number	
v. 42, no. 7 (2022 Sept.)			
Enumeration		Chronology	
Piece format*			
Physical		•	
Expected receipt date		Comment	
MM/DD/YYYY	Ë	2x claim sent via <u>ebsconet</u> 1/18/23. JC claimed via <u>ebsconet</u> 9/7/22	
Order line locations		- Supplement	
Mann (mann)			
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: I.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