Patron status workflows

Patron status workflows fall into two categories:

Item Status of Requested Items	Item Statuses of Checked Out Items
Call slips Hold Request Recall Request On Hold	Charged Lost-System Applied Overdue

If the item being withdrawn has a **Requested Item Status**, click the Request Maintenance icon to determine who is requesting the item.

1. If it has been requested by an actual **reader**, selectors may want to have this information in order to decide whether to re-order the book. Consult with your supervisor about whether to keep track of reader requests, then take off the hold and continue with step 4 of Process item circulation and status updates [1].
2. If it has been requested by a **pseudo-patron**, take off the hold and continue with step 4 of Process item circulation and status updates [1].

If the item being withdrawn has a **Checked Out Item Status**, click the Patron icon to determine to whom the item is charged.

1. If it is an actual **reader**, contact Laura Sider [2].

- If the patron charge is current, and a selector has chosen to withdraw the book upon its return to the library, place HOLD using a withdrawal pseudo-patron and set the hold expiration date to ten years in the future. When the item is returned, the withdrawal hold will be activated and the item will be physically discarded at that time.
- If the patron charge is NOT current – that is, if the item is overdue or billed, see instructions under Missing/billed for replacement (BFR) items, lost-system applied [3].

1. If it is a **pseudo-patron**, determine whether the pseudo-patron is a library team/department, or whether it is a missing/billed books pseudo-patron.

- If the pseudo-patron is a library team/department patron, contact the person in charge of the pseudo-patron to find the item and discharge it to remove the missing status. An E-mail stationery can be set up for this situation.

NOTE: If the department reports the item as NOS, withdraw the item. Otherwise, do not withdraw the item unless a selector has made a decision to withdraw it. If this is the case, make sure the item is properly discarded (see Final steps [4]).

- If the pseudo-patron is a missing/billed books patron, see instructions in Missing/billed for replacement (BFR) items, lost-system applied [3].

Links
[1] https://web.library.yale.edu/cataloging/catalog-maintenance-policies/item-withdrawl/process-item-circulation [2] mailto:laura.sider@yale.edu [3] https://web.library.yale.edu/cataloging/catalog-maintenance-policies/item-

withdrawl/missing-billed-items [4] https://web.library.yale.edu/cataloging/catalog-maintenance-policies/item-withdrawl/final-steps