

Claims

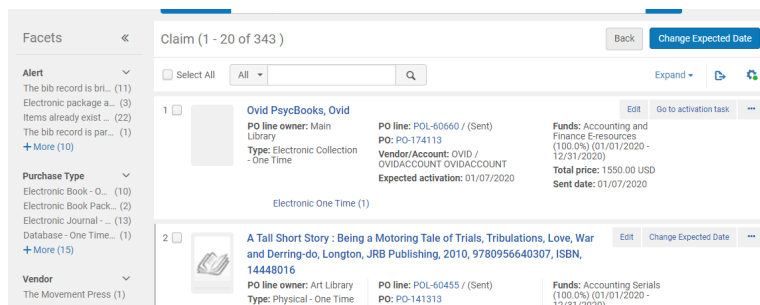
What is a typical claim workflow in Alma?

Alma supports automatic claims processing by default; however, claims can also be generated manually. Automatic claims are created for a Purchase Order (PO) line that has not been received within the expected number of days after placing the order or by the expected receipt date.

Claims are automatically posted to the Task List where authorized staff can select to review and take further action if desired.

Possible actions include updating the expected receipt date based on new information provided by the vendor or cancelling the purchase order line if necessary. Updating the item information resets the expected receipt date and removes the item from the task list.

The screenshot below shows the claims review task list for an acquisitions staff member:

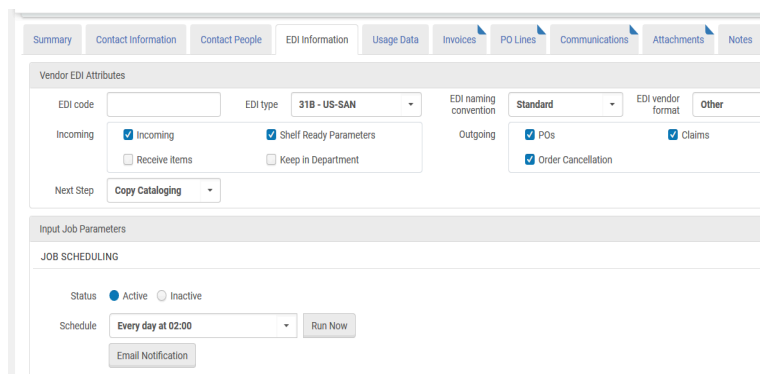


Can claims be sent by EDI

An email is sent to the vendor (generated automatically or manually) inquiring about the late delivery of the order.

For vendors that support this feature, claims are sent using EDI instead of by email. EDI claims can be used for both one-time and continuous orders.

The following screen capture shows EDI definitions on the vendor record:



Does Alma support automatic claiming?

Automatic claims are created for a Purchase Order (PO) line that has not been received within the expected number of days after placing the order (based on parameters defined in the vendor record – as can be seen in the following screen capture) or by the expected receipt date.

Delivery and Claim Information			
Expected receipt after ordering (days)	5	Claiming grace period (days)	3
Expected invoice interval (days)	4	Expected activation after ordering (days)	1
Renewal evaluation interval (days)	10	Subscription grace period (days)	90

How are claims for print issues managed?

Claim information for serials can be generated automatically in Alma on the level of the title and on the issue level. It is generated based on data in the vendor record (subscription grace period) and in the PO Line (subscription interval).

For vendors that support this feature, claims are sent using EDI for both one-time and continuous orders.

Order Lines with claims will display in the Alma Task List (based on the roles of the staff user).

The edit option will open the PO Line of the record. From there it is possible to navigate to the item (issue) records.

Library	Location	Call Number	Copy ID	Summary	Number of Items
1 Main Library	General	S494.5.C6 A27	1	v.1+v.2; v.3 no.1+v.3 no.2,	22

The staff user may then see the issues that should have arrived, and need to be claimed.

	Barcode	Library	Location	Call Number	Alternative Call Number	Description	Temporary Location	Status	Process type	Access Number	Receiving date
1	AUJ38056	Main Libra...	General	S494.5.C6 A27	-	Vol. 3 no. 3 (2014 05)	No	Item in place	-	-	07/16/2015
2	AUJ37990	Main Libra...	General	S494.5.C6 A27	-	v.4 no.4(2016 Oct)	No	Item not in place	Acquisiti...	-	-
3	AUJ37989	Main Libra...	General	S494.5.C6 A27	-	v.4 no.3(2016 July)	No	Item not in place	Acquisiti... technical services (CopyCat)	-	01/08/2016

From the PO Line, staff can initiate correspondence with the vendor from the Communications tab. The body of the email is automatically populated with bibliographic information.

Type: **General**

Subject * **October 2016 issue missing**

Body * **Order Line Reference Number: POL-43929
Title: ACE quarterly.
Publication Date: Vol. 1, no.1 (Jan. 2013)-**

ADD AN ATTACHMENT

File name:

URL:

Notes:

When the vendor responds, the staff user saves the email message as an .msg file, and can then attach the email as a response to the correspondence.

Is it possible to facet or filter the claims task list?

The claims task list can be filtered in a variety of ways. For example it can be filtered by Alerts, Purchase Type, Vendor, if it is a Rush order, Library, Acquisition method and reporting code.

It is also possible to search within the claims task list via a wide variety of indexes.

The screenshot shows a web interface for a claims task list. On the left, there are facets for 'Alert', 'Purchase Type', 'Vendor', and 'Rush'. The main area displays a list of claims, with two items visible. Each item includes a book icon, a title, MMS ID, assigned to, type, PO line owner, standard number, PO, PO line, total price, funds, vendor/account, vendor reference ID, and expected activation date.

Facets

- Alert
 - At least one of the... (315)
 - Duplicate active ord... (77)
 - Electronic package a... (3)
 - Electronic resourc... (244)
 - + More (10)
- Purchase Type
 - Database - One Time... (1)
 - Print Journal - Subsc... (2)
 - Electronic Book - Su... (1)
 - Electronic Book Pack... (2)
 - + More (15)
- Vendor
 - A D & L Vendors (2)
 - YVS Ltd. (Also know... (1)
 - Alexander Street Pre... (4)
 - Boardman (1)
 - + More (25)
- Rush
 - Rush (6)
 - No Rush (390)

Claim (1 - 20 of 396)

Select All All

1 #01 Spork Out of Orbit: Respect, The Kane Press, 2015, 1-57565-820-8, ISBN
MMS ID: 99303011300121 Total price: 0.00 USD
Assigned to: - Funds: -
Type: Electronic Book - One Time Vendor/Account: ProQuest / ProQuest ProQuest
PO line owner: Art Library Vendor reference ID: -
Standard number: 1-57565-820-8 Expected activation: 11/16/2020
PO: PO-482113
PO line: POL-61366 / (Sent)
Electronic One Time (1)

2 #00 An Introduction to the Pink Collection [electronic resource], -, M-Y Books,, 201
MMS ID: 99303211300121 Total price: 0.00 USD
Assigned to: - Funds: -
Type: Electronic Book - One Time Vendor/Account: ProQuest / ProQuest ProQuest
PO line owner: Art Library Vendor reference ID: -
Standard number: 1-908411-47-3 Expected activation: 05/14/2019
PO: PO-482113
PO line: POL-61371 / (Sent)
Electronic One Time (1)

The screenshot shows a dropdown menu for filtering claims. The menu is open, showing a list of filter options. The options are: All, Vendor account code, Fund code, Fund name, PO Line, Additional PO Line Reference, PO reference number, Vendor invoice number, Sip ID, Import job ID, Reporting code, MMS ID, All, Material type, PO Line type, Secondary reporting code, and Tertiary reporting code.

Select All All

1

2

3

3D Interactive Tooth Atlas

Total views:

6040