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## Group Therapy

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# Group Therapy

## Publisher Responses to Claims

Column Editor: Rosann Bazirjian (Florida State University)

Hey y'all out there! Do you have any gripes? Come to your therapist! Try <rbazirji@mailers.fsu.edu> or FAX 904-644-5170.

### GRIBE: Submitted by Genevieve Clay (Acquisitions Librarian, Eastern Kentucky University)

My check-in clerk is having an annoying problem with publisher responses to claims sent from our vendor as our NOTIS acquisitions module generates the claims. One of the claims we use daily reads, "Our records indicate the next issue on our subscription is overdue. The last issue received was . . . Please send the next and following issues."

The claim letter is worded clearly — right? Apparently not! More and more often we get the last issue as listed in the letter. It's a duplicate, of course. There is no mention of whether the publication is behind. We assume the person handling the claim misread it. It means additional follow-up on our part. For a domestic title I can contact the publisher/vendor by phone or email. But for titles published abroad . . . ? Is there a solution I haven't thought of?

### RESPONSE: Submitted by Tim Turner (Regional Sales Manager, The Faxon Company, Inc.)

Claim errors regarding lapsed issues certainly can happen due to misinterpretation of the claim form that is generated by the integrated library system. In this case, the form clearly states that you want the next issue(s) following the last. However, the only number that is printed on the form is one which you have already received. Instead of the form telling your vendor, "I want #275 and subsequent issues," it tells your vendor you've already received #274 and want the rest.

Claim forms from an ILS vary system to system and your vendor processes a variety of these on a daily basis. If a form generated by your system for a gap is similar to a lapse, your vendor may interpret the single issue number on a claim form to be that of a gap and, consequently, claim that issue. Another possible cause here is one of the publisher's responses to your claim. Even if the vendor has entered the claim correctly, a publisher may have a delay in publishing the next issue. In their effort to fulfill a claim, they may just ship the last issue published (which you already have) without notification of the delay.

There are several steps that you can take to try and rectify the situation. First, see if the lapse notice can be altered to tell the vendor of the next issue you require instead of the last one you received. This reduces the possibility of the vendor entering a claim for a journal which you already possess. Second, be sure to notify your vendor that the situation is getting worse, not better. We can't fix problems of which we're not aware. This will allow your account representative to focus more attention toward these kinds of claims. Being aware of the problem will allow the vendor to identify if it is caused during processing, or if specific publishers or publications are involved. Finally, remember to utilize your serials vendor as much as possible. That's why you pay a service charge. Not only are you wasting precious time calling publishers individually, but the vendor is totally unaware you are having problems. If the vendor makes the publisher contact and discovers there is a publication delay, they can update their system and prevent further false claims from being generated for other libraries. Until claiming becomes a primarily automated function, steps like these need to be taken to limit the occurrence of human error.

### RESPONSE: Submitted by Tina Feick (Sales Manager, North America, Blackwell's Periodical Division)

Ah, claims — the challenge of the serials world — whether in the manual or the automated mode, we still must deal with claims. With

automated check-in, the serials industry is confronted with an ever-increasing number of claims being sent by libraries to agents and then forwarded by the agents on to the publishers. Yes, some are premature but also some claims are for missing items that libraries never had time to uncover in the manual check-in environment. So, with the proliferation of claims and in order to get the paperwork through, everyone is going too fast. We are not taking time to read the "fine print." It is too easy to look at a claim and misinterpret that the last issue received is now thought of as the actual missing issue. This evidently is resulting in duplicate issues.

So what to do?? I suggest the following steps:

1) Look to your automated system and see if you will be able to use a different claim message that perhaps highlights or better states the claim. The ideal would be to claim the next issue to be published and cite the actual volume and issue number. I fully recognize that sometimes it is not easy to determine what the next issue's numbering will be!! 2) Check with your subscription agent to see if they have any suggestions. Ask the agent if the claims are easy to read at their end and if they are also finding publishers misinterpreting the claims. 3) Part of the difficulty is determining if the next issue has actually been published. One option is to check despatch (British spelling as I work for a UK agent) information that is being electronically sent to agents. Many agents display the despatch or dispatch information, actual issue shipment dates, in their online systems. In Blackwell's CONNECT, our online system over the Internet, we currently have despatch data from the following publishers: Academic Press, Blackwell Science (under test), Elsevier (including Pergamon), Kluwer, Springer-Verlag, Taylor and Francis, Turpin Transactions (distributor for many British societies and other publications- Royal Society of Chemistry, etc.), and John Wiley US. This information is being sent electronically according to an EDI (Electronic Data Interchange) X12 standard created by ICEDIS (International Committee on EDI for Serials). Libraries should be able to check their agents' online systems and determine what was the last issue to be shipped and the date it was sent. The libraries actually know if the issue has been published and whether their claim is legitimate.

Another option that libraries may use is to look at check-in data from the various document delivery systems - such as UnCover — or other libraries' information. Also, of course, the World Wide Web holds an array of publishers' data. Checking files takes time that many of us do not have the time to invest, but this is only an intermediary step. (I can dream!!!)

Yes, there is a future where agents hope that EDI transactions will resolve some of this claiming anxiety. A claim will go to the agent who will have publisher status information and the response will return to the library indicating availability — all without human intervention. If the claim is premature, there will be a date supplied saying when the next issue is planned to be released. This takes cooperation of all parties involved — libraries, automation system vendors, publishers, agents. Most agents and some publishers are ready. Automation system vendors are beginning to explore EDI applications.

In the meantime, make sure you are doing the following: • Send out clear claims with specific missing issue details. • Check with your subscription agents to make sure your claims are understood. • If you have time, determine via your agent's online system whether the issue in question has been published. • Push for EDI applications to be implemented by your automation system vendor, publishers, and subscription agents.

(The SISAC X12 Implementation Guidelines for EDI which includes transaction sets for order status inquiry (claims), order status response (claim response), invoice, and ship notice manifest (despatch) is available from the SISAC office, 160 Fifth Avenue, New York, NY 10010 — Phone 212-929-1393.)