Using Tipasa automation for mailing to home based on patron type/status

It's likely that some or all your patrons need items to be delivered to their homes. Tipasa automations can help! Use automated tagging of requests and the document delivery module to easily set up and provide home delivery.

Here we describe the setup and workflows for mailing items to a home or office address for all patrons of a specific type/status (e.g., faculty, graduate student). For details about mailing to home at the patron's request, see Using Tipasa automation for mailing to home "on demand".
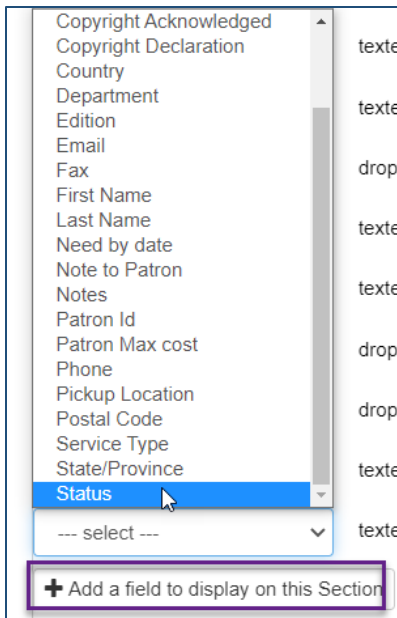
Contents

Edit Patron Request Workforms to include address and status fields

Ensure workforms used by patrons to request items they may need to have mailed (e.g., **book** and **other**) include all address fields.

These five values must be included:

- Address 1
- City
- State/Province
- Country (optionally select a default value)
- Postal Code

If address information is included in the patron record, these values will auto-populate when the patron opens a request form.
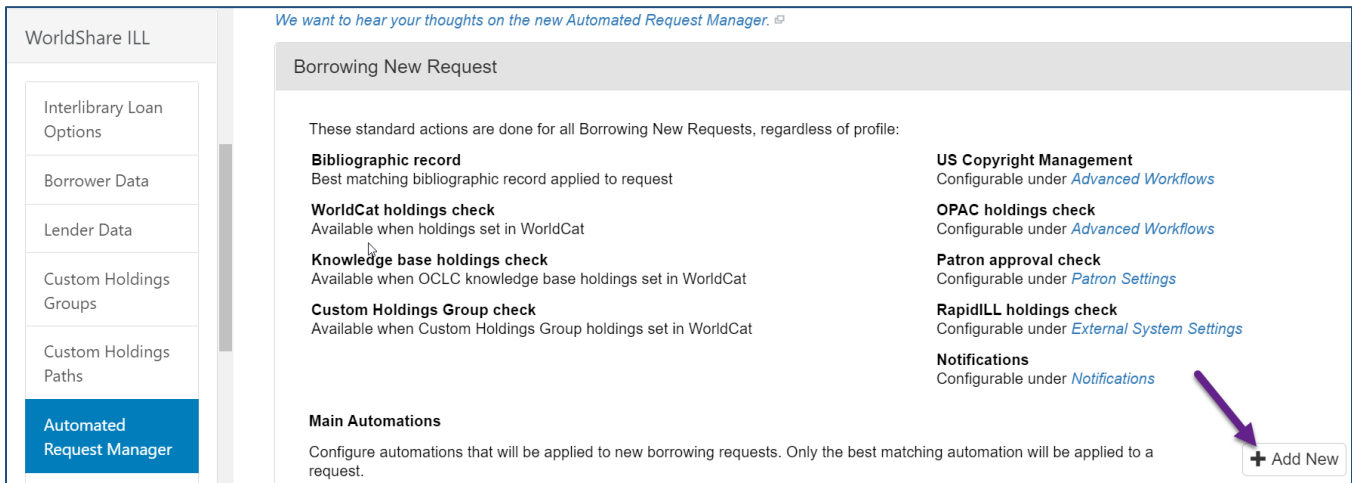
Also ensure the **Status** field is on your request forms. If the patron record includes ILL Patron Type, the value will auto-populate when the patron opens a request form.

Automatically tag requests for mailing to home

Automated Request Manager can automatically tag requests for mailing to home based on the patron's status.

In OCLC Service Configuration, under **WorldShare ILL**, click **Automated Request Manager**. Add a new automation that will identify requests that should be mailed to a patron's home.

Name the automation (e.g., MAILTOHOME) and assign it a priority. Make sure to prioritize this automation so that it comes before any automations that perform more general actions.

Under **Matches,** select **Patron Statuses** and specify the patron types that should automatically receive the mail to home service.

Required fields are marked with an asterisk *

*Name

MAILTOHOME

*Priority ℹ

1

Matches

| Patron Statuses ⌄ | Faculty, Graduate | ⊖ |

Comma separated values.

Under **Actions**, select **Add Request Tag** and specify the tag you would like to use (e.g., mail to patron). You can either use an existing tag or create a new one for this purpose. If adding a new tag, be sure to tap Enter before moving away from the text box. The tag you select or add should appear in the box with a blue background.

If you are mailing borrowed items to patrons' homes as well as items from your own collection, you can add an action either to **Build the Lender String** (which will add a lender string from your Custom Holdings Path and put the request in review) or **Send Request to Lenders** (which will send the request unmediated to lenders in your specified Custom Holdings Path).

Finally, **Save** your automation.

Actions

Route Request to Review ⌄		⊖
Build Lender String ⌄	Minimum Lenders 1 ⌄ Custom Holdings Path NEWPATH ⌄	⊖
Add Request Tags ⌄	mail to patron x	⊖

⊕ Add an Action

Exceptions

⊕ Add an Exception

Save Cancel

It will appear in your list of automations in Priority order.

Name	Matches	Actions	Priority ⓘ		
MAILTOHOME	Patron Status(es): Faculty, Graduate	Route Request to Review. Build Lender String if at least 1 lender(s) from Custom Holdings Path NEWPATH hold(s) the item. Request Tags: mail to patron	1	Edit	Delete

Mail requests to home

For items in your own collection

In your **New for Review** queue you will see requests tagged with **mail to patron** (or whatever you specified for your tag).

Borrowing Requests: New For Review (32)

Export All

Results 1 - 20 of 32

Rows 20 |< < 1 2 > >|

ID	Status	Media Type	Title	Patron	Date Requested	Need Before	Tags
204298133	Not Reviewed	📙	Handbook of attachment : theory, research, and clinical applications /	Katt, Stella	09/09/2020	12/12/2020	mail to home
204254759	Not Reviewed	📑	Journal of personality and social psychology.	Rosenfeld-Jones, Ronan	09/04/2020	12/20/2020	
204254734	Not Reviewed	📙	Homepage usability : 50 websites deconstructed /	Miller, Thomas	09/04/2020	12/20/2020	mail to home
204224876	Not Reviewed	📑	The psychology of Joss Whedon : an unauthorized exploration of Buffy, Angel, and Firefly /	Rosenfeld, Jenny	09/02/2020	09/26/2020	
204224861	Not Reviewed	📙	Flourishing : positive psychology and the life well-lived /	Explorer, Neil	09/02/2020	12/20/2020	mail to home

Open each request to determine if it is held by your library. If it is, you will see a green check mark with **Held by my library** near the top right of the request.

Manually route the request to **Document Delivery** by using the **Change Fulfillment Type** option at the top of the request.

.

At the top right of the request, click **Print Now**. This will print a full request slip with Call Number as well as patron information (name, email, phone, and mailing address) included.

On the printout, the **Patron Information** section includes the patron's mailing address. Use this information for shipping the item. You can then either mark the request complete and manage the checkout in your local circ system only or keep it open in ILL until it is returned.

For items borrowed from other libraries

In your **In Transit** queue, you will see the **mail to home** tags. The patron's full mailing address will be included on the request printout, as above, so that you may mail the item without needing to look up the address separately.

Note: If automation is not sending requests direct to lenders, you may wish to specifically send them to lenders with a long loan period. The OCLC Profiled Group **LONG** is helpful for this and includes lenders with loan periods of 12 weeks or longer.

Export a list of requests to print mailing labels

If you prefer to use custom mailing label templates, you can export a list of all requests that should be mailed to home. From the Tipasa home page, click the **mail to home** tag to retrieve active requests with that tag.

Then use the **Export All** function to create a .csv file of data about the requests.

Using mail merge, you can print custom mailing labels – both mailing labels for sending items to your patrons and return labels for patrons to send items back.

Questions?

If you have questions about the setup or workflows, or would like additional information, please contact OCLC Support.