

New Procedure for LOST materials

Note: LOST items PAID for in a *Polaris Patron Account* are being automatically deleted by TRAC weekly.

1. Please run the *custom report* in Polaris entitled 'Lost Items' regularly.
(Once per week for most, but libraries only open once or twice a week may choose monthly)

The first time you run this report, try to resolve any LOST items belonging to YOUR library that you know you're not going to get back or receive payment for

**Once you do this regularly for a while, the list will shorten and it will become easier to manage.*

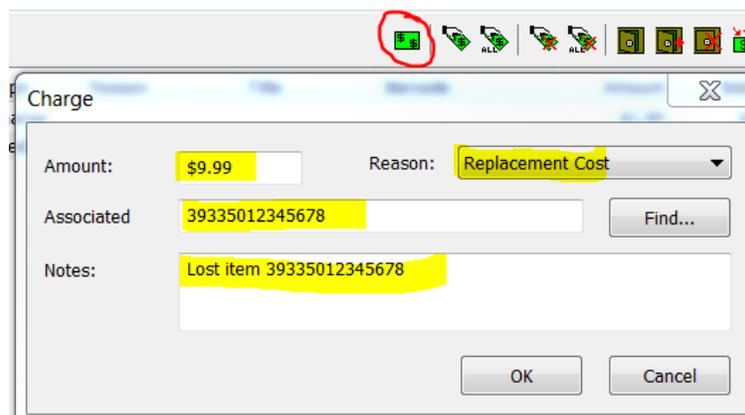
If the patron library and the transacting library are two different libraries, this means this person is a wandering patron. In this situation you would charge the transacting library instead. For more information on wandering patrons please look at the [TRAC Operational Guidelines](#).

If you see a library outside of TRAC appear in the patron name field of the custom report this means the item is an inter library loan through VDX. Please contact this library directly when trying to retrieve the lost item.

If you delete a LOST item that is still attached to a patron, you *may, on occasion*, have to **post a manual charge** on the patron account to remove the item off your LOST list, but ensure the patron is still accountable. Please verify that the charge has remained on the patron account after deletion.

Remember that you are NOT permitted to place blocking notes on another libraries patron account. You MUST use non-blocking notes, if any.

See the screenshot below for an example of posting a manual charge:



Charge

Amount: \$9.99 Reason: Replacement Cost

Associated: 39335012345678 Find...

Notes: Lost item 39335012345678

OK Cancel

2. Invoice other libraries for your LOST materials

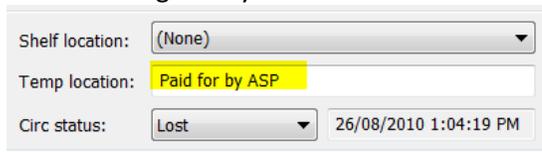
*The owning library **must invoice within a year** of an item becoming lost if they want to receive compensation. If the owning library has not sent an invoice within a year the library is not obligated to pay.*

***Be sure to keep a record of libraries you've invoiced and what for** – Polaris does NOT retain this information! There is a spreadsheet template for tracking and a fillable Invoice template available on our website @ <http://www.peacelibrarysystem.ab.ca/ILL-Procedures> .

After a reasonable time if the owning library has any concerns about an unpaid invoice from a library, they can contact their Regional Headquarters.

If the transacting library would like to negotiate please contact the invoicing library directly.

3. If an item is PAID for by another library, and the charge is still outstanding in the patron record, place a **PAID** note in the *Temp location* field of item record as shown below so that if the library eventually does receive payment from the patron, they know right away not to remit to the item's owning library.

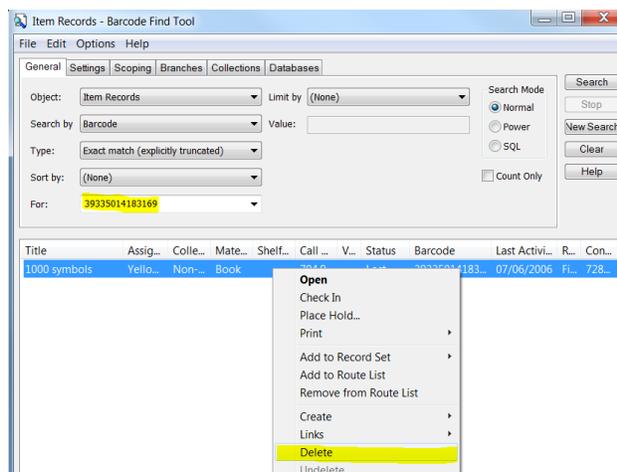


Shelf location: (None)
Temp location: Paid for by ASP
Circ status: Lost 26/08/2010 1:04:19 PM

Note: If you are the transacting library and you are receiving payment from a patron for a deleted item, be sure to check for this note!

4. Then *delete* the LOST item by *right-clicking* the item record as shown below. When deleting, if you receive the message 'last copy options', click 'yes' to suppress the empty bibliographic record from displaying in PAC.

*This is the **ONLY** time I will ever tell you to use the DELETE function in Polaris!



Please be advised the current permission structure for TRAC member libraries staff in Polaris restricts **DELETE abilities to locally owned items **ONLY**.