New Procedure for LOST materials

Note: LOST items PAID for in a *Polaris Patron Account* are being automatically deleted by YRL 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:
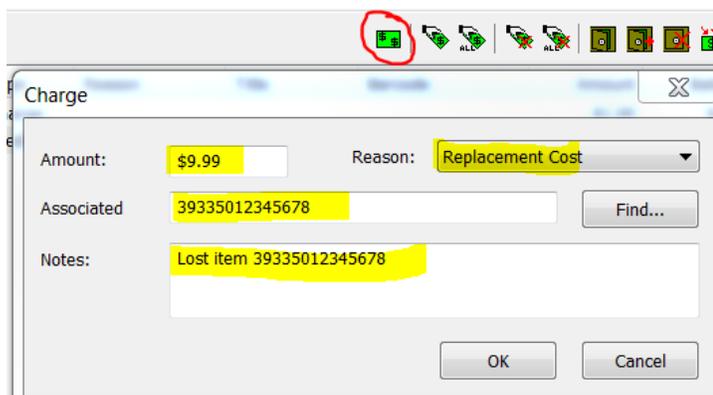
2. Invoice other libraries for your LOST materials

   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 an Invoice template available on our website @ *http://yrl.ab.ca/content/forms* entitled **'Lost Items Tracking Spreadsheet'** *&* **'Lost Items Invoice Letter'.**

   You are encouraged NOT to invoice for items lost 'pre-Polaris' due to the inability to trace circumstances; moving forward, you are encouraged to only invoice for items lost within the last year.

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.

   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.

   This is the ONLY time I will ever tell you to use the DELETE function in Polaris!
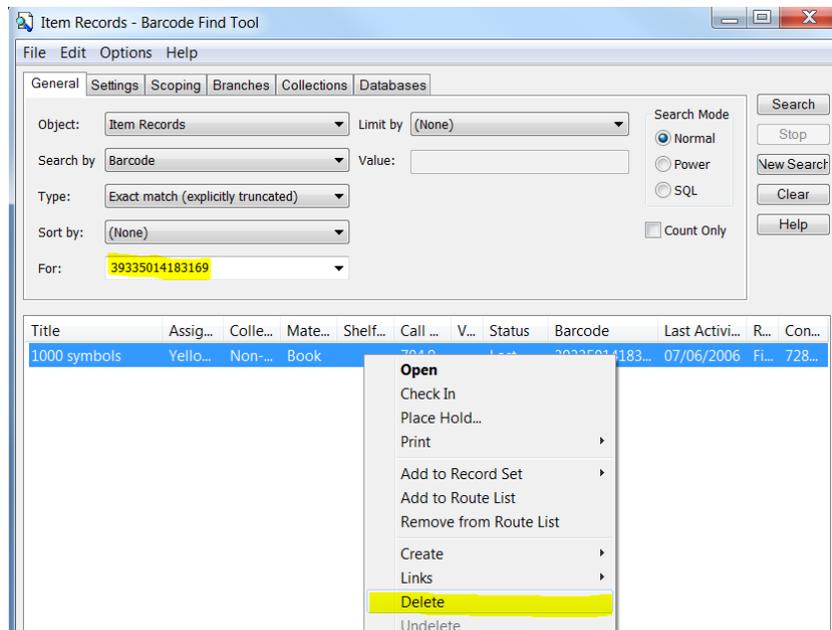
   Please be advised the current permission structure for YRL member libraries staff in Polaris restricts **DELETE abilities to locally owned items ONLY.