

---

## Claimed to Lost Procedure

---

The TRAC Operational Guidelines explain that a *Claim Returned* or *Claim Never Had* item can be considered lost after six months.

**\*The Owning library should check its shelves and ask the Transacting library to do the same before proceeding to convert the Claimed item to lost\***

Although there is no function in Polaris for physically changing a Claim status to a Lost status in either the item record or the patron record (Status view), the Owning library may consider the item lost and invoice for it. The Transacting library is obligated to pay the invoice, in the same way that it is for any other lost item, and may choose whether or not to recoup the cost from its patron or wandering patron.

### 1. Create a Claimed Report

Access Simply Reports at: <http://catalogue.tracpac.ab.ca/simplyreports/>

Your username and password are the same as for logging onto Polaris.

- From the **Items** tab select **Item List Reports**.
- Select the following columns: Item Assigned Branch Name (this is the Owning Library); Item Barcode; Item Call Number; Item Checkout Branch Name (this is the Transacting Library); Item Circ Status; Item Claimed Date; Item Price; MARC Title; Patron Barcode for Claimed Item; Patron Full Name for Claimed Item.
- Sort the report by the **Item Claimed Date** column.
- Select the **Item General Filters**: click a checkmark in the Branch box and highlight your library in the list; click a checkmark in the Record status box and highlight Final from the list; click a checkmark in the Circ status box and highlight both Claim Returned and Claim Never Had (to highlight the second selection, use the Ctrl key when clicking).

### 2. Add to Lost Item Record Set

In the claimed report, you will see the *Item Claimed Date*. Calculating from this date, the Owning library generally waits **six months** before changing the status to lost. Items claimed more than 6 months prior can be added to a lost item record set and sent in to HQ for deletion (send to Jessie Bach, [jessie@marigold.ab.ca](mailto:jessie@marigold.ab.ca)).

[**Note:** deleting the item record will also delete the claimed information from the patron record; the number of claims made by the patron will be retained]

### 3. Optional: Invoicing for Claimed Items from Non-Marigold Patrons

**Owning library:** The Owning should invoice the transacting library within a year of the item being claimed. If the Owning library waits longer to invoice than a year from the date the item became claimed, the Transacting library is not obligated to pay the invoice.

Once payment has been received, place a “paid” note in the item record’s **Temp Location** field and re-save the record. Add the item to a lost item record set to be deleted by HQ (send to Jessie Bach, [jessie@marigold.ab.ca](mailto:jessie@marigold.ab.ca))

**\*Marigold member libraries do not reimburse other Marigold member libraries for damaged and lost materials. Please notify the owning library that their item(s) is damaged or lost.**

**Transacting library:** When you receive an invoice for a claimed item that is now considered Lost, your library must pay the owning library’s invoice. If you want the claim information to be retained, place a note in your patron’s record restating the claim information. This information will disappear from the patron record’s status view once the owning library receives your payment and deletes its item record. If you intend to recoup payment from your patron, manually create a charge in the Status View – Account of the patron record, including the item barcode and an explanation in the note field that it was a claimed item now considered lost.