



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 and the Transacting library can be invoiced.

The Owing library should check its shelves and ask the Transacting library to do the same before proceeding to convert the Claimed item to Lost.

The Owing 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. Run a Claimed Report

Access Utilities>Reports and Notices>Cataloging>Item>Claimed Items choose your library and hit submit. Please check each item record on your report to confirm the transacting library to invoice as some patrons may be wandering.

2. Send an Invoice

Owning Library: In the Claimed Items report, you will see the *Item Claim Date*. Calculating from this date, the Owing library generally waits *six months* before invoicing for the Claimed item. If you decide NOT to invoice, delete the item record so that it doesn't keep showing up in the Claimed report each time you generate it. [NOTE: Deleting the item record will also delete the Claimed information from the patron record.] If the Owing library wishes to be reimbursed for the Claimed item—*at the latest*, it should invoice the Transacting library *within a year* of the item becoming Claimed. If the Owing 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.

Transacting Library: When you receive an invoice for a Claimed item that is now considered Lost, your library must pay the Owing library's invoice. If you want the Claim information to be retained, place a note in your patron's record restating the Claim information (which you will find in their status view), because this information will disappear from the patron record's status view once the Owing library receives your payment and deletes its item record. If you intend to recoup payment from your patron, go to the claims view of the patron status, click on the claimed item and then click on the declare lost icon in the middle right side. A pop up will come up with the replacement amount listed. Under actions choose charge and then hit OK. The claimed item has now been switched to lost and a charge has been added to the patron's account.

3. Record the Payment

Once the Owing library has received payment from the Transacting library, the Owing library should place a "paid" note in the item record's "Temp Location" field, re-save the record, and then delete the item record so it doesn't show up the next time the Claimed report is generated.