# Complete Damaged or Lost Item Procedure

**Note:** These instructions apply to in-system Polaris LEAP items only. For interlibrary loan items, please contact Parkland's ILL staff at: ill@prl.ab.ca.

**Note:** The responsibility for contact when an item is lost or damaged lies with the borrower's library. Parkland will forward completed *Damaged or Lost Item Forms* to the appropriate libraries, but it is up to the involved libraries to reach a solution together.

## Receiving a Damaged Item – Initial Steps

When a patron returns an item that has been damaged, follow the below steps first.

1.  Check to see who owns the item.
    a.  If the item is owned by your library and was lent to your patron, proceed to the Steps in Polaris When Processing an Item that is Damaged section and follow those steps.
    b.  If the item is not owned by your library, <u>do not</u> check the item in yet. Contact the owning library *immediately* to find out whether they would like to charge for the item or not. You can contact them by phone, email, or by filling out the Damaged or Lost Item Form on the PRLS Support Site. Once you have received an answer from the owning library as to how they would like to handle the item, proceed to the Steps in Polaris When Processing an Item that is Damaged section to mark the item damaged and bill the patron (if directed to do so by the owning library).
        i.  Waive any late fines associated with the item resulting from your delay in checking in the item once you have confirmation from the owning library how they'd like to proceed.
    c.  If an item is received at your library to fill a request made by one of your patrons, and it is in damaged condition, proceed to the Other Steps That May Need to be Taken section and follow the steps.
    d.  If another library's item is damaged in your possession (book drop issues, spillage at the circulation desk, etc.), proceed to the When an Item is Damaged at Your Library section and follow the steps.

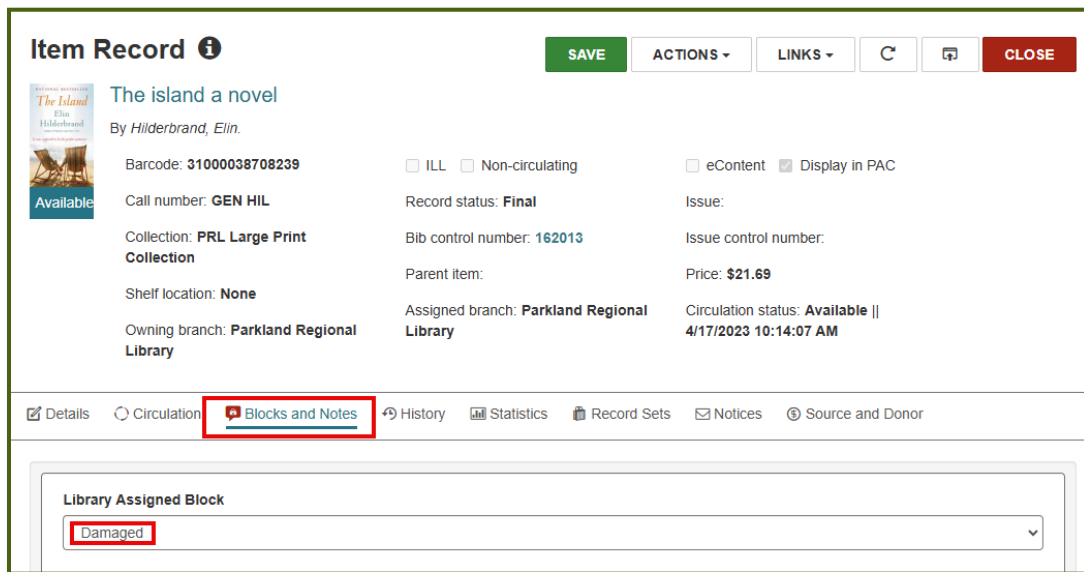## What To Do When a Patron Loses an Item – Initial Steps

1.  Check to see who owns the item.
    a.  If the item is owned by your library and was lent to your patron, proceed to the Steps in Polaris When an Item is Lost section and follow those steps.
    b.  If the item is not owned by your library, contact the owning library *immediately* to find out whether they would like to charge for the lost item or not. You can contact them by phone, email, or by filling out the Damaged or Lost Item Form on the PRLS Support Site. Once you have received an answer from the owning

library as to how they would like to handle the item proceed to the <u>Steps in Polaris When an Item is Lost</u> section to declare the item lost and bill the patron (if directed to do so by the owning library).

## Steps in Polaris When Processing an Item That Is Damaged

When an item is returned damaged and deemed "unable to circulate," the staff member checking in the item will mark the item as damaged.

1. Open the item record (regardless of the assigned branch) by clicking on the checked-in item. Select **Blocks and Notes** and change the **Library Assigned Block** to "Damaged".
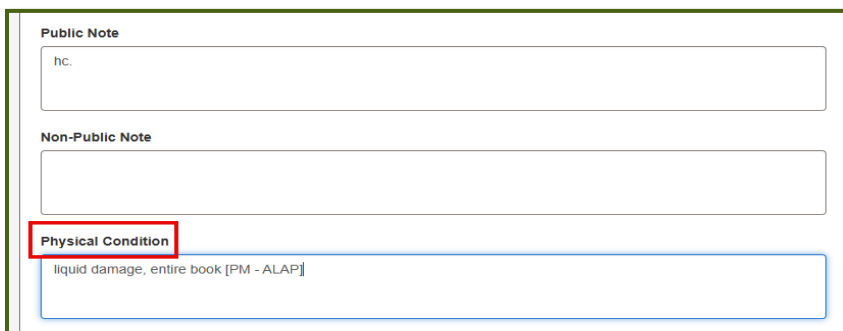


2. Under **Physical Condition**, add a description of the damage as well as staff information [staff initials – library code] and click **Save**.
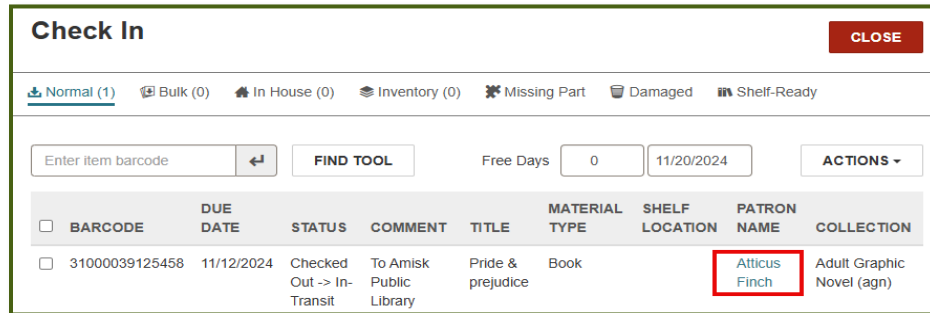


**Note:** If the damaged item is not owned by your library, ensure you have connected with the owning library to see if they would like to charge for the cost of the item **BEFORE** proceeding with Steps 3-6.

3. Open the last patron's record by clicking the **Patron's Name** on the **Check In** screen.
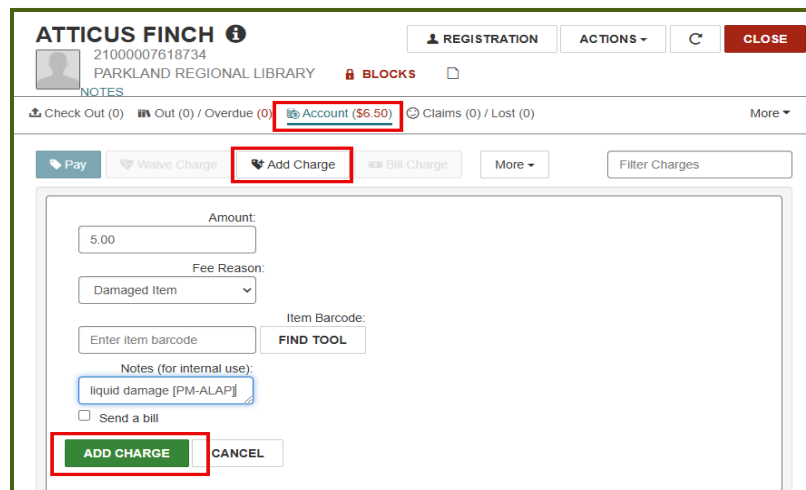


4. Open the patron's **Account** tab and select **Add Charge**. Add the item's replacement **Amount** (or reference the "Default Prices by Collection" document on the Q Drive). Q:\Collections\Collection Development\Evaluating your collection

5. Select "Damaged Item" as the **Fee Reason** and scan or type in the damaged item's **Barcode**.

6. In **Notes**, add the damage description and [staff initials-library code], and click **Add Charge**.



At this point, the fee can be paid right away or it can remain as a charge on the patron's account. If you have collected money for a damaged item that is not owned by your library (under the direction of the owning library), send payment (*either by etransfer or cheque*) with a copy of the correspondence (i.e., Damaged or Lost Item Form) to the owning library in your van run. If requested, send the item to the owning library via van. Physically label the item as damaged.
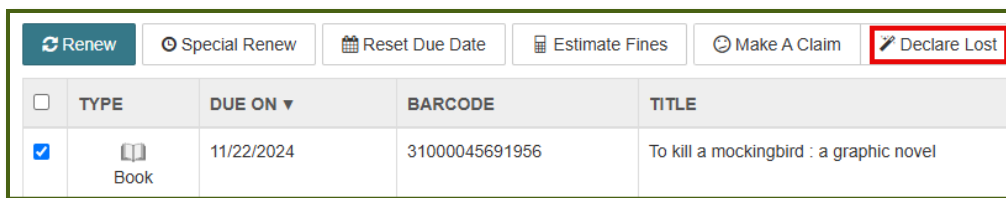
## Steps in Polaris When an Item Is Lost

**Note**: Items with a status of **Lost** were checked out by a patron and lost. **Missing** items were misplaced from the library without being checked out. So, a Lost status has a patron attached to the item, a Missing status does not.

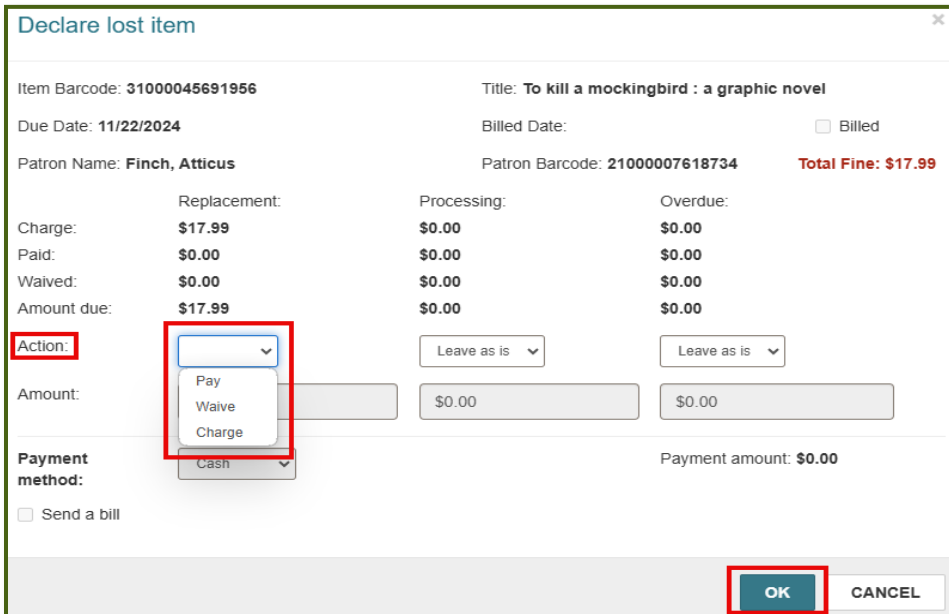To declare an item **Lost** from the patron's checkouts:

1. Open the patron's record. **Check Out** should be the default action. Switch over to the **Out/Overdue** tab.

**ATTICUS FINCH** ⓘ
21000007618734
PARKLAND REGIONAL LIBRA

⬆ Check Out (0) | 📖 Out (1) / Overdue (0)

2. Select the check box next to the item(s) to declare lost and click the **Declare Lost** button.

| 🔄 Renew | ⏱ Special Renew | 📅 Reset Due Date | 📓 Estimate Fines | ☺ Make A Claim | ✏ Declare Lost |
| --- | --- | --- | --- | --- | --- |

| | TYPE | DUE ON ▼ | BARCODE | TITLE |
| --- | --- | --- | --- | --- |
| ☑ | 📖 Book | 11/22/2024 | 31000045691956 | To kill a mockingbird : a graphic novel |

3. Choose an **Action** option (Pay, Waive, or Charge) and click **OK**.

**Declare lost item**                                                ×

Item Barcode: **31000045691956**          Title: **To kill a mockingbird : a graphic novel**

Due Date: **11/22/2024**               Billed Date:              ☐ Billed

Patron Name: **Finch, Atticus**        Patron Barcode: **21000007618734**      **Total Fine: $17.99**

|  | Replacement: | Processing: | Overdue: |
| --- | --- | --- | --- |
| Charge: | $17.99 | $0.00 | $0.00 |
| Paid: | $0.00 | $0.00 | $0.00 |
| Waived: | $0.00 | $0.00 | $0.00 |
| Amount due: | $17.99 | $0.00 | $0.00 |

Action:  [ ▼ ]          [ Leave as is ▼ ]      [ Leave as is ▼ ]
   Pay
   Waive
Amount:   Charge          $0.00              $0.00

**Payment method:**  Cash ▼                    Payment amount: **$0.00**

☐ Send a bill

[ **OK** ]   [ CANCEL ]

4. Charged items will automatically show up in the patron's **Account** tab.
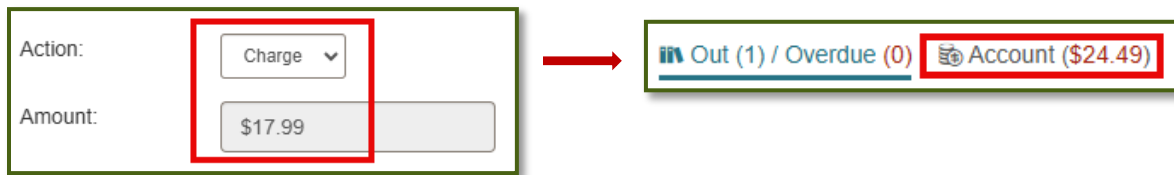
At this point, the fee can be paid right away or can remain as a charge on the patron's account. If you have taken money for the lost item, send payment (*either by etransfer or cheque*) with a copy of the correspondence (i.e., Damaged or Lost Item Form) to the owning library.

## When an Item is Damaged at Your Library

If another library's item is damaged in your possession (book drop issues, spillage at the circulation desk, etc.):

1. Complete the Damaged or Lost Item Form or call/email the owning library to discuss how they'd like to proceed.

2. Send the item back to the owning library and sort out replacement fees (if applicable).

## Transferring Funds for Replacement Costs

Options to transfer funds from your patron or library to the owning library:

1. Have the patron write a cheque for the amount to the owning library and send by van run in a blue canvas bag.

2. If you collect fees by debit, credit, or cash, deposit the funds to your library account and issue a cheque for the amount collected to the owning library. **Libraries should not send cash via the PRLS van run.**

## Responsibilities of the Borrower's Library

As the borrower's library, you have a responsibility to contact your borrower within *2 weeks* of discovering damage to an item last signed out to them, to notify them that they have been billed for lost or damaged items, and to find out if they will accept responsibility for the loss/damage.

1. **Patron Accepts Responsibility** - You can collect payment immediately. In the **Account** tab of the patron's records check the box of the charge and click **Pay**. Collect the replacement fee and, if applicable. give the damaged item to the borrower if they wish to keep it. Send payment with a copy of the correspondence (i.e., Damaged or Lost Item Form) to the owning library.

| | TYPE | DATE ▲ | BARCODE | TITLE | REASON | ORGANIZATION | NOTE | BILLED | AMOUNT | BALANCE |
|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | Charge | 11/20/2024 | 31000039125458 | Pride & prejudice | Overdue Item | Parkland Regional Library | | | $1.50 | $1.50 |
| ☑ | Charge | 11/12/2024 | 31000039125458 | Pride & prejudice | Damaged Item | Parkland Regional Library | Liquid Damage | | $5.00 | $5.00 |
| | | | | | | | | | | $6.50 |

2. **Patron Does Not Accept Responsibility** - Remove any blocks and/or any charges associated with the lost/damaged item from the patron's record, inform the owning library that the borrower is not accepting responsibility, and if applicable, return the item to the owning library.

**Note**: At a meeting of Parkland Library Managers in October 2008 it was decided that the owning library will absorb the cost of lost or damaged items when the borrower does not accept responsibility for the loss/damage.

## Responsibilities of the Owning Library

As the owning library, you have the discretion of whether to collect replacement fees for a damaged or lost item. Your decision should be based on a variety of factors, including the age of the item, the number of circulations, the extent of damage versus normal wear and tear, etc.

## Process for Receiving Damaged Items Sent from Another Library

1. If the item has been damaged, the owning library will check in the item, and the **Block** will pop up prompting you to check the condition of the item. If necessary, the owning library will change the item's record circulation status to "Withdrawn".
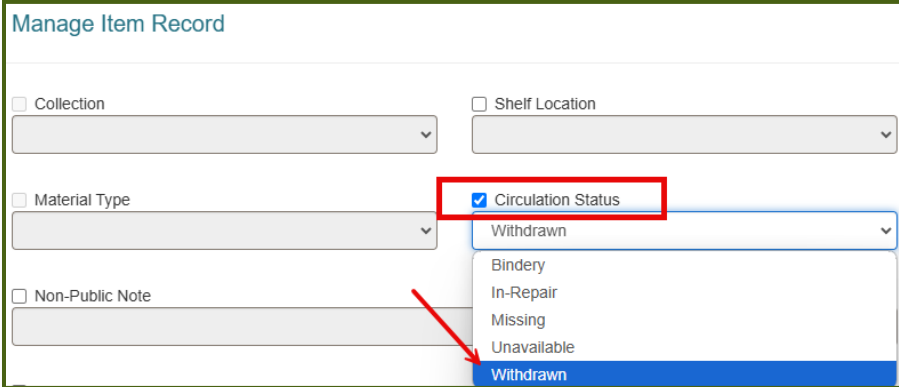


2. Click **Continue** on the block pop-up, check the box of the item, click **Actions**, and click **Manage Item Record**.

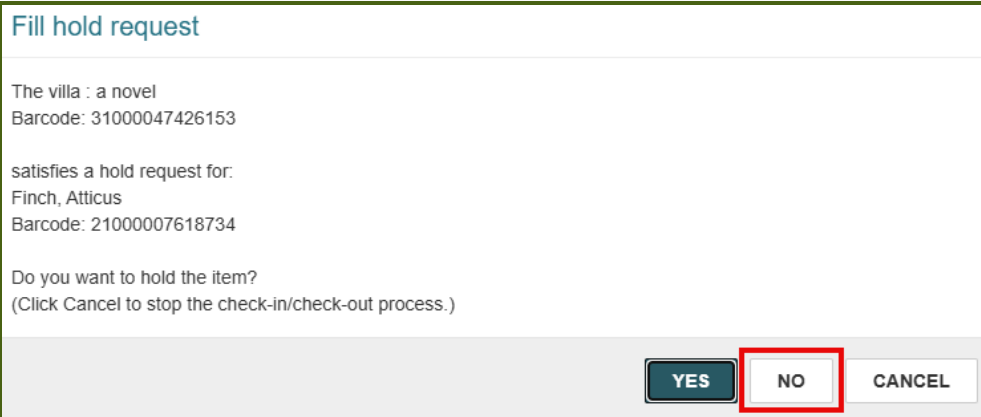3. Click the box for **Circulation Status** and change the status to "Withdrawn".



**Note**: If you check in the item again the circulation status will return to "Available".

**Note:** Lost items will automatically transition to a "Withdrawn" status after 12 months.
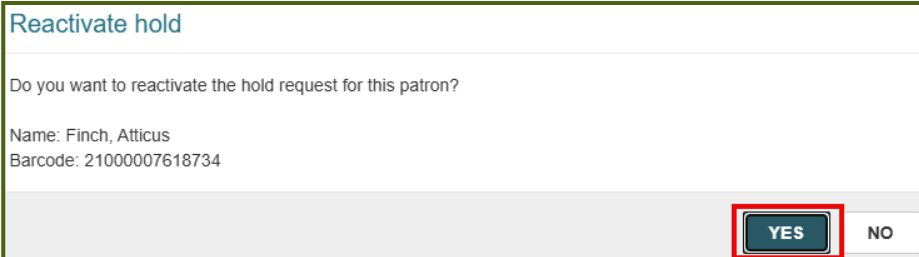
## Other Steps That May Need to Be Taken

If an item is received at your library to fill a request made by one of your patrons and it is in damaged condition.
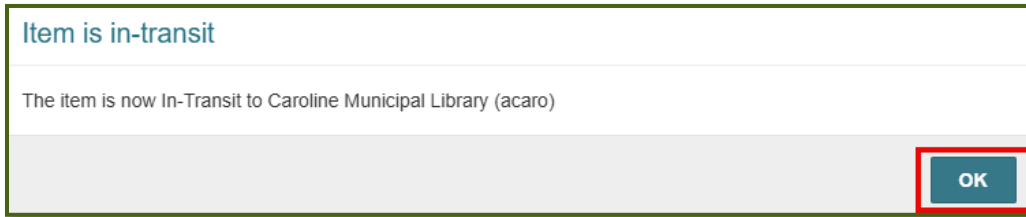
1. Check the item in, and a **Fills Hold Request** will appear, click **No**.



2. A **Reactivate Hold** window will appear, click **Yes**. This ensures the patron is placed at the top of the holds queue.
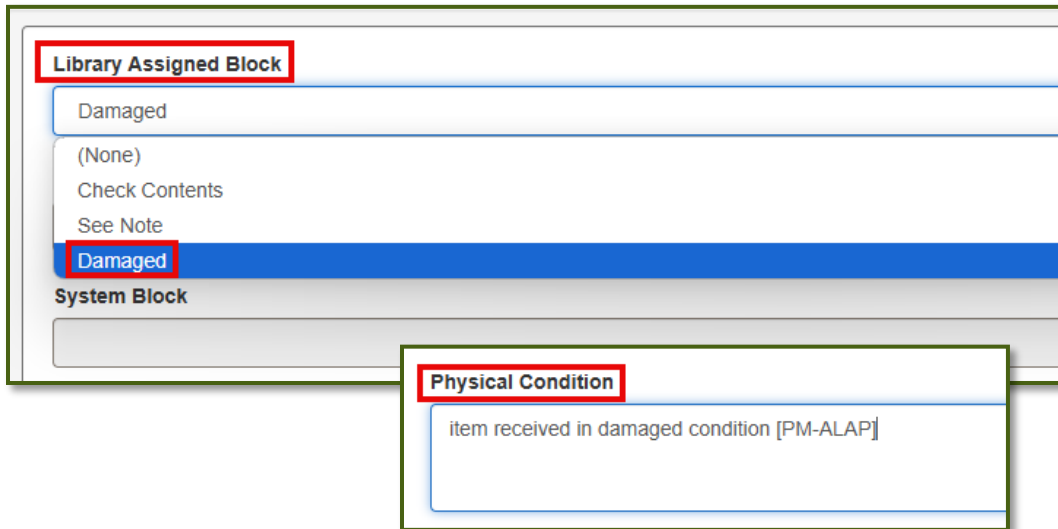
3. An **Item is In-Transit** window will appear stating the owning library, click **OK**.



4. Click on the item to open the **Item Record**. In the **Blocks and Notes** tab, change the **Library Assigned Block** to damaged and note the damage in the **Physical Condition** field of the item record (e.g., Item received in damaged condition [staff initials-library code]). Click **Save**.



5. Complete the Damaged or Lost Item Form or call/email the owning library to discuss how they would like to proceed. Then send the item to the owning library via van run. Physically label the item as damaged.