RECONCILIATION (search for lost items) POLICY

PREVIOUSLY DECIDED STANDARDS

●Prospector considers a book to be lost after no more than 55 days. Libraries could opt for shorter billing cycles if they prefer to, or to match local billing policies.

●Local libraries will define the number and frequency of their own notices such that the billing notice is produced by the date established in the Prospector billing policy (or as close as possible taking into account weekends, etc.)

●In the November 18, 2003 lost book reconciliation recommendation to the Deans/Directors, the financial reconciliation process was shelved in favor of a simplified tracking version that included searching to minimize losses. A copy of the separate policy is archived.

REVISED RECONCILIATION PROCEDURE

● Just as a book is considered billed after 55 days, a book will now be considered to be in the reconciliation stage 200 days after it is billed (or 255 days from the due date).

● The reconciliation now consists of only one report: **LONG OVERDUE (LOD) INCLUDING PASCAL** for the previous year. Former reconciliation reports RETURNED TOO LONG, CLAIMS RETURNED and DAMAGED are no longer part of reconciliation. Best Practices govern those processes.

● The Chair of the Document Delivery committee will ask each institution to provide their LOD list to a central place for compilation. These reports will be due by the date of the July Document Delivery meeting each year. The many institutional LOD reports will be compiled into one, master search list. Once compiled, all items are searched at each location and any items found are returned to their home site. Each institution should also check their stacks for their own items found on these lists—if possible this step should be done prior to submitting the search list at the July meeting.

● Found items are reported to the central list site so that it can be removed from the master copy as well as to the entire listserv population so others can keep tabs on how the overall search is going.

● (1) Using the LONG OVERDUE calendar, each institution will create a INSTITUTIONAL OVERDUE ITEM LOCATION LIST with a minimum overdue parameter of <day of year report is run> days and a maximum parameter of <day report is run plus 365>. This will begin the reconciliation cycle for the previous calendar year.

● The Committee will determine a reasonable search timeframe and at the end of the searching, the revised master will be distributed along with some basic statistics about the numbers.

● George will share the final results to Deans/Directors/Members accordingly.

NEW ADDENDUM: CLEAN-UP OF LOCAL DATABASES (PATRON AND ITEM)

● The CLAIMS RETURN (CR) feature of Prospector will be used for both claims returned items and to permit clean-up of "real" (as opposed to virtual) records. Prior to now, virtual record remained linked to both the real patron and the real item long after the book was billed. This resulted in sites never being able to delete real records that were virtually linked together. CLAIMS RETURN severs those links. In the absence of exchanging money (as was done in the old Reconciliation policy, pre-2004), CR is no longer needed for reconciliation.

● Each site can create a list to determine the extent of CR's at their library—both for item records and patron records. Use the following logic to limit your CR search to any calendar year: NOTE <u>has</u> claimed <u>and</u> NOTE <u>has</u> @9 <u>and</u> NOTE has <u>20xx</u> where xx is the last two digits of the calendar year you are searching.