The Board of Directors of Marmot Library Network wishes to eliminate the necessity of Marmot member libraries charging each other for books loaned to and lost by patrons during the PIH process. It is the hypothesis that books lost from your library by another library's patrons will be roughly equal to books lost by your patrons that were borrowed from another Marmot library. The second part of the hypothesis is that the value of the items will be roughly equal over a period of time.

In order to prove this assumption (or to disprove it) from July 1, 2011 until December 15, 2011, Marmot libraries are to:

- Stop billing each other for lost items
- Establish a method to statistically track value lost and value charged
- Publicize guide lines for participating Marmot PIH libraries to follow during this period
- Establish procedures that are simple and easy to followed

Procedure

Should your Patron declare they have lost an item that was borrowed through PIH and wish to pay for it and clear their records, the patron's library collects the money and marks the item "lost and paid." The collecting library keeps the money and adds whatever processing charge they would normally add to one of their own items. This means that if a library does not charge a processing fee, they would not charge one even if the item came from a library that does charge a fee. *It is important to note, until the list is compiled after December 15, item records with the status of "lost and paid" should not be deleted. After the list is compiled and saved, you can deal with your "lost and paid" records as you normally would.*

Some participating libraries will accept replacements. Should your library choose to do so, they can offer a patron who has lost a participating library's item the choice to replace that item. The following guidelines should be followed.

- The item is left on the patron's record until such time as the patron brings in the replacement.
- The replacement must match the item lost or damaged. (A hardback for a hardback, an unabridged for an unabridged, etc.)
- *The replacement should be new*. No used items will be accepted. If a used item is all the Patron offers, the item must be paid for.
- Upon physical receipt of the replacement copy, the library "checks in" the item from the patron's record, records the barcode of the original item and includes it on a note with the replacement item and sends it by courier to the home library. The item, which is now "in transit," is then "checked in" at the home library. The replacement copy is processed by whatever procedures the receiving library normally follows for a replacement copy.

If the status of a PIH item on your Patron's record is changed to "Billed," it should remain there until it is paid for or replaced. It is important that no item be marked as checked in and therefore "in transit" unless it has actually been checked in or replaced. If your patron feels that they have returned the item

and it is somehow "lost" and you feel the need to mark the item "claims returned," then inform the item's home library, either by e-mail or phone, that such an action was taken.

Statistics Recovery

Two templates have been added to the Saved Search section in the "create list" functionality, aptly named "PIH -Money owed to us" (# 111) and "PIH - Money we owe" (#110.) **Please do not overwrite these.** They show the logic used to create the two lists.

"Money Owed Us" is to list your books lost by other libraries' patrons.

- Item agency is = to your Library. AND
- Item LCHKIN between 07/01 and 12/15 2011******* (this is why you need to save the "lost & paid" records.) AND
- Item status = to "lost & paid" ($) AND
- Item out loc between 1 and the highest number before the lowest number of your terminals. (If you are unsure of your terminal numbers go to Marmot.org – Help Desk – Millennium Stuff – Terminal #s. You want to start with 1 as 0 can produce some off effects.) OR
- Item out loc greater than the highest terminal number you have.

Notice that the last two lines are GROUPED. They have parenthesis around them. You do that by highlighting the two lines and then the "group" button becomes empowered when you are laying out your "search records" parameters.

This creates a list of your items whose status is "lost and paid" and whose last checkout was done at a terminal not belonging to your library. In other words, other libraries' patrons who have lost your stuff and paid for it. Now you can either export these records to an Excel spreadsheet or you can do it through statistics.

If you do it through Excel, ask for the Barcode, the Call #, and the Title as well as the PRICE and the out loc. (Out Loc = last terminal it was checked out at) Search your library for the missing item first to make sure that it really isn't there. The price is included because the total is the amount that is "owed" to you for your books. (No, you're not actually going to get it but it will be ok as you will see after you run the "Money we owe.")

You can sort your list by Out Loc which is handy to see just where your stuff got lost and to see how many were at Out Loc #10. #10 is anyone who did their last renewal online. So you can, probably will, have some of your patrons in that category and you will have to remove them from the list. They do not count for this purpose. Only your items lost by some other library's patrons are included in this procedure.

For those of you who do not use the Millennium statistics functionality, here are the steps as outlined by Penny Shiel (MCPL.)

After running your list in "create list" open "statistics." Click on "New Query."

Save the query name and results file name even though information will be used immediately. From the drop down menu at the left select "review." Locate your file on the list and highlight it. (You'll need to remember what you named it as you cannot search by bucket #.) Make sure it says "item" in the type of record to report on and that you click the box "fastest accumulation." Click on "run the query." A warning will pop up that you have not saved your search. Click "OK." Your report will show at the bottom of the "statistics" list. Once it has completed, open it by double clicking the title. As a default, the report displays what is in the first field. Results can be sorted by any of the fields in the list in the column to the left by clicking on the field.

The only drawback to this method is that it is harder to list the #10 (remote users) Out Loc items to see which ones were "lost & paid" by your patrons. By exporting the information, you can get individual barcodes and so have faster access to the records.

"Money we owe" is to list other libraries' items lost by your patrons

This is almost a mirror image of the previous procedure

- Item agency is *not =* to your library   AND
- Item LCHKIN between 07/01 and 12/15 2011*** AND
- Item status = to "lost & paid" AND
- Item out loc between your library's terminal numbers.

This creates a list of all items "lost and paid" that are not your items but were last checked out at your library. In other words, money you would owe to other libraries.

Export or sort just as you did the previous list and you will have a dollar amount for money you would owe.

You can now compare the amount you would have to pay out to other libraries versus the amount you would have other libraries pay to you.

*** **ADJUST THE DATE FROM 12/15/2011 TO 12/31/2011 IF YOU CHOOSE TO RUN THESE REPORTS AFTER THE FIRST OF JANUARY. OR IF YOU'RE RUNNING THE REPORTS BETWEEN 12/15 AND 12/31, ADJUST THE DATE TO MATCH THE DAY YOU'RE RUNNING THEM.**

Putting it all together

Between December 15 and December 25, run these two lists. Remember to eliminate from your "money owed us" list any #10 terminal last check outs that were your patrons'. Send this information to Mary Katherine who will then get it to the Marmot Board of Directors. The reason for doing this in the time frame is because the circulation statistics are "rolled" for all the items that belong to public libraries in

Marmot on Dec. 31 or January 1. This will cause the last "updated date" to be reset to 01/01/12 and will no longer be useful for this procedure.

Thanks to everyone for your cooperation in this effort to simplify the PIH reconciliation process.