CLS Lost In Transit | Expired Hold Shelf Reconciliation Audit 2026

On an annual basis, WRLC AFN (Alma Fulfillment Network) libraries, that participate in CLS (Consortium Loan Services), conduct an annual Reconciliation Audit to identify and resolve materials that have an outstanding In Transit status and Expired Hold Shelf status.

These items may be:

- Temporarily misplaced
- Delayed in transit
- Incorrectly Checked Out/ In or routed
- Permanently lost

This process mirrors long-established interlibrary loan practices whereas the requesting/borrowing institution is ultimately responsible for materials that cannot be located after a documented search.

Why This Process Exists

- To ensure accurate shared collection records
- To fairly assign financial responsibility for lost materials
- To confirm that every reasonable effort has been made to physically locate items before replacement costs are assessed

Comprehensive Reconciliation Report 2026*(link)*

- Includes CLS items (In Transit status) and Expired Hold Shelf items; January 1, 2025-December 31, 2025
- At the December RSC meeting, RSC agreed that each library will conduct a comprehensive physical search for every item listed on the report

RSC Agreed Audit Timeline

February 20, 2026	Comprehensive Reconciliation CLS Report distributed at the February RSC meeting
April 30, 2026	All libraries complete a physical search for items on the report
May 15, 2026	After the Spring semester ends and graduation concludes, allowing a final opportunity for items to be returned, Angelique will complete a final audit of all items that remain In Transit
By June 30, 2026 (Close of FY26)	Final audit will be used to determine outstanding balances owed by borrowing libraries to partner lending libraries Final reconciliation report completed

1: Receive the Reconciliation Report At the February meeting, the RSC liaison will provide the Comprehensive Reconciliation Report to all participating libraries. The report includes associated bibliographic and item identifiers.

2: Create a Local Copy of the Spreadsheet Make a copy of the provided spreadsheet for your home library.

- Use this copy to reformat per your libraries search procedures
- Do not edit the original consortium file

3: Conduct a Physical Search for Each Item For every item listed, conduct a thorough physical search, which may include:

- Hold shelves
- General collections
- Reshelving areas
- Known problem locations (e.g., sorting areas, processing shelves)
- This includes items identified as Expired Hold Shelf Items:

4: Item is Located

- Enter 1 in the F=1/NF=0 column
- Found items should be Checked In to the appropriate Circulation Desk; follow all in-house CLS processing guidelines
- Once completed, the item's Status should reflect as <Item In Place>
- If it belongs to a fellow CLS lending library, it should processed and routed as per usual:

  How to Check In Items: How to Check in AFN Items

5: Item is Not Located Enter 0 in the F=1/NF=0 column

6: Managing Expired Hold Shelf Items Similar to CLS items, Expired Hold Shelf Items are often mis-shelved in the Stacks

- **If Item is located**

    - Discharging CLS Hold Shelf Items: Part B: Hold Shelf Items That HAVE Expired Past Hold Until Date
- **If item is NOT located**
    - Expired Hold Shelf Audit Workflow: Patron Resolution (If Item Is Not Located)

Note: Patron Resolution is entirely at the requesting libraries' discretion. Similar to outstanding CLS material, item's not checked out to the requesting patron's account will be added to the final audit of items owed to the lending library.

7: Record Search Results (Required Format) In the first column of the spreadsheet, record the outcome of your search:

- Enter 1 if the item is Found
- Enter 0 if the item is Not Found

8: Complete Searches by the Deadline All physical searches must be completed no later than May 15th. This ensures:

- Adequate time for review and auditing
- Completion before the end of the academic year fiscal year

9: Submit Your Results Email your completed spreadsheet to: carson@wrlc.org

Important Requirements:

- Use only this numeric method
- Do not highlight cells
- Do not add notes, comments, or alternate symbols

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