

Appendix 6

National Tropical Botanical Garden Herbarium (PTBG) Policy Governing Herbarium Loans

I. Procedures, conditions, and length of loans.

1. Loans of botanical specimens are made primarily to representatives of recognized botanical institutions. The head of the borrowing institution assumes complete responsibility for the safe custody and return of the specimens. Specimens should be stored in insect-free, airtight cases and should be treated with extreme care.
2. Requests for loans should be addressed to the Curator of the Herbarium, should state the name of the investigator who will be examining the specimens, and should provide a short account of the work planned.
3. Specimens must not be removed from the borrowing institution, and they may not be transferred from one institution to another without written permission and agreement of all parties concerned.
4. Whenever possible, specimens requested should be listed individually and show locality of origin, collector's name and number.
5. Specimens other than types are sent on loan for a period of one year, with extensions possible upon written request to the Curator of the Herbarium. Under no circumstances will specimens be loaned for more than five years.
6. Type specimens may be sent on loan for a period of six months, with one extension possible upon written request to the Curator.
7. Loans should be returned at the earliest opportunity, preferably in their entirety. It may occasionally be necessary to recall material out on loan.
8. All material of requested taxa may not be sent at any single time.

II. Annotating, packing, and handling of specimens.

1. All borrowed specimens must be annotated as fully as possible. Annotations should be made on a separate sheet of high quality paper or small label (determination slip) no larger than approximately 2.5 x 10 cm and glued fast to the herbarium sheet. White herbarium glue is preferable; rubber cement and other non-permanent adhesives should never be used. Under no circumstances should cellulose self-adhesive tape or self-adhesive labels be used.

2. Annotation labels should be placed within boxes or plastic bags of specimens stored in that manner. Annotations should be typewritten or printed with indelible ink, **never** with a ballpoint or felt tip pen. The annotations should show the name and institution of the determinor, date of determination, and should include the status of type specimens with reference to the basionym and author. If the researcher agrees with the original determination or cannot make a determination, the specimens should be so annotated. Previous annotations should not be altered or obscured, and original labels or notes must not be marked, covered, or removed. No marks of any kind should be made on the herbarium sheets.
3. Herbarium sheets must not be folded, bent, or laid face downwards. Type specimens and other important specimens should remain in their covers except during actual examination.
4. Judicious dissection of specimens except types is normally permitted. Whenever possible, all materials studied should be returned to the herbarium specimens. The removal of important elements such as flowers, fruits, leaves, wood, or pollen is not permitted without prior written permission. A representative selection of all dissected material, including micro-preparations, should be permanently mounted, labeled, and returned to the herbarium. A label recording the date of removal of material, the name of the person obtaining the sample, and the place of deposition of the prepared slides should be affixed to the sheet from which the material has been removed. Duplicate glass slides of pollen grains and copies of photographic prints resulting from studies based on PTBG specimens are appreciated.
5. Dissection or removal of material from type specimens is **not** permitted.
6. All specimens should be cited with the international herbarium acronym "PTBG" in any published specimen listings.
7. Returned specimens should be carefully packed to avoid damage in transit.
8. Reprints of all studies or publications based on PTBG specimens should be sent to the Curator.

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