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CIRCULATION SHORTCUT KEYS

- F1 – Help
- F2 – Check In workform
- F3 – Check Out workform
- F5 – Refresh
- F6 – Patron Status workform
- F7 – Patron Registration workform
- F8 – Property Sheet
- F9 – Switch between Patron Registration and Patron Status workforms
- CTRL-ALT-F9 – Item Record Find Tool
- F12 – Bibliographic Record Find Tool

See Appendix A for more shortcut keys.

CHECK OUT

- Check Out Blocks and Messages
- Check Out an Item
- Check Out – Other Tasks

You check out items to a patron using the Check Out workform. As you work, the workform lists all the items checked out to a patron during the current session. The upper right portion to the Check Out workform summarizes the patron’s registration information, and the upper left portion of the Check Out workform shows current patron status information and displays updates to the patron’s status as changes occur during checkout.

Check Out Blocks and Messages

Messages and blocks may appear during check out and renewal.

- Patron and Item Blocks
  - Patron Blocks – You may see the Patron Blocks dialog box during check out. Patron blocks relate to Patron Record conditions, such as overdue fines or the need to verify patron data. The Patron Blocks dialog box may also lists blocks on associated patron records.
  - Patron has Unread Messages – If a patron has unread messages, an alert message appears in the Patron Blocks dialog box. You can continue the check out operation or cancel it, and you can also click the block text to open the Patron Status workform – Notes view. The alert message does not place any blocks on patron activity in the PAC.
- **Item Blocks** – During check out, you may see the Item Blocks dialog box. An item block may indicate that an item should not be checked out, or that it requires special handling.

- **Non-Circulating Items** – You may see a message regarding restricted circulation. Your library may designate some items as non-circulating to all patrons, or may allow some items to circulate only to certain patrons. You can override the library policy and continue the check out, or cancel the check out for this item.

- **Overdue Fines**
  - **Overdue Fine** dialog box – This dialog box appears if there is a fine on an item that has already been checked out. You can accept payment and renew, waive the fine and renew, charge the patron’s account and renew, or cancel the transaction.
  - **Automatic Fine Waivers** – Your library may choose to automatically waive overdue fines at check out. For example, a patron may check out an item, and a message indicates the item is already checked out to another patron. If the item is overdue, the library may want to simply forgive the fine. If Polaris is set to waive the fines, the Overdue Fine dialog box does not appear during check out.

- **Check Out Charge**
  - The patron checkout charge dialog box appears when you scan an item at check out or renewal, the item’s assigned branch has placed a charge on the item for check out or renewal, and your library has set this dialog box to appear. You can accept payment and continue the transaction, waive the charge and continue the transaction, charge the patron’s account and continue the transaction, or cancel the transaction.

- **Item Belongs to Another Library**
  - You may see the following messages regarding an item’s assigned branch:
    - This item is assigned to [library]. Do you want to continue with this transaction? – The item does not belong to your branch. You can continue or cancel the check out. If you cancel the check out, a message asks if you want to put the item in-transit to the assigned branch. You can put the item in-transit to the item’s assigned branch, or you can keep the item at your branch.
    - This item is in transit to [library]. The item’s status indicates that it has been put in-transit to its assigned branch. However, you can still continue the check out, or cancel it.

- **Holds Messages**
  - During check out or renewal, the following messages may appear relating to holds:
    - This item satisfies a hold. Do you want to hold the item? – The item satisfies a hold request for another patron. You can designate
the item to fill the request (and stop the check out), or override the request and continue with check out. If you override the hold, a message asks if you want to reactive the hold request for the patron whose hold request was overridden.

- This item cannot be checked out because it is being held. – The item is being held for another patron. You can override the hold and continue with check out, or stop the check out process. If you override the hold, a message asks if you want to reactivate the hold request for the patron whose hold request was overridden.
- Transfer this item to [library] for hold? – The item fills a hold request for a patron at another library. You can override the hold and continue with check out, or stop the check out process and transfer the item. If you override the hold, a message asks if you want to reactivate the hold request for the patron whose hold request was overridden.

- **Circulation Messages**
  - You may see the following messages related to item circulation:
    - Item is over the renewal limit – Renew the item anyway, or cancel the renewal.
    - The item is already checked out to this patron – Renew the item or cancel the renewal.
    - This item is already checked out to another patron – Check in the item and then check it out to the current patron, or cancel the check out.
    - Item is due at library closing time – Allow the item to circulate overnight, or make the item due at closing time.

**Check Out an Item**

1. Click **Circulation, Check Out** from the Shortcut Bar, click 📚, or press F3. The Check Out workform appears:
2. Enter patron information using one of the following methods:

- Scan the patron barcode in the **Patron barcode** box, or type the barcode and press [Enter].
- To find a patron without a barcode, click the [Find] button next to the **Patron name** box to display the **Find Tool** and search for the patron’s record. When you have found the patron’s record, double click the line to send them to the Check Out window.
- If the patron is checking out more materials after completing one transaction, select the arrow by the **Patron barcode** box or press F4 and select the patron’s barcode from the list. The list contains up to two patron barcodes – the last patron, and the one before that patron. The list is cleared when you close the Check Out workform.

3. Enter item information using one of the following methods:

- Scan the item barcode in the **Item barcode** box, or type the barcode and press [Enter].
- To find an item without a barcode, click the **Find** button next to the **Item barcode** box to display the Find Tool and search for the item record. If no item exists, you can create an on-the-fly item record at check out.
- When the item information has been entered, the status bar indicates that the check out was successful. The item information appears in the list of items checked out.
- Repeat the previous steps until you have checked out all the patron’s items. The total number of items checked out appears in the status bar at the bottom of the workform.

4. To complete this patron’s session, verify that the Item barcode box is blank and press [Enter]. If your library uses a receipt printer, a check out receipt should automatically print. Your library can be set up to prompt you to print a receipt instead.

**Check Out – Other Tasks**

During Check Out, you can perform other tasks without leaving the Check Out window:

1. **Finding Bibliographic Records** – If a patron wants more information about a title, you can search for bibliographic records without leaving the Check Out workform. Click in the toolbar or press CTRL+B. From the **Find Tool** results list, you can open the bibliographic record. This feature is also convenient for finding an item’s missing barcode. Right click the bibliographic record in the results list, and select **Links, Item Records**.
2. **Find Any Item Record** – You can search for any item record without leaving the Check Out workform and without entering patron information. Click in the toolbar or press **CTRL+B**, and select **Item Records** from the **Object list** in the **Find Tool**. You can set the **Find Tool** so the results list is retained even after you select an item in the results list and open it. Select the **Find Tool Options** menu and be sure close on **Open is unchecked**.

3. **Place a Hold** – You can search for any bibliographic or item record and place a hold on the item for this patron. For more details on how to place, see the Holds manual provided by SHARE.

4. **Renew an Item** – You can renew an item for a patron in the CKO workform. You must find the patron’s record by scanning their barcode or clicking the **[Find]** button. Once the patron record is found, scan the barcode of the item you want to renew. A message appears that states, “This item already checked out to this patron. Do you want to renew?” Click **[Yes]** or **[No]** to continue.

5. **Opening Patron Workforms** – On the Check Out workform, you can select the buttons above the list of items to open the **Patron Registration** workform and specific **Patron Status** views. When you move the cursor over a button in the Line Item Tool Bar, you see a tooltip that identifies the button, and an equivalent shortcut key.

6. **Changing Due Dates** – You can assign a special loan period or reset due dates of checked out items by using the buttons below:
7. **Automatic Shortened Loan Periods** – Your library may choose to shorten an item’s loan period automatically under the following circumstances:

- A specified number of hold requests are placed for the item.
- The due date is past an end-of-term due date.

In either case, you may see a message that the loan period has been shortened.

8. **Express Register a New Patron** – With the appropriate permission, you can register a patron from the Check Out workform. Click to open the Express Registration view. The new patron can check out items immediately upon registering.

**Assign a Special Loan Period**

1. Display the Check Out workform and input the patron’s barcode.
2. Click [Special] in the Loan Period area of the workform.
3. The Special Loan dialog box appears.
4. Set the due date by one of these methods:

- To specify the exact date, select a date on the calendar.
- To specify the loan period, type the number of minutes, hours or days in the **Loan period value** box, and select the loan interval in the **Loan period interval** box.

The due date is calculated and highlighted on the calendar. The system takes closed days and dates into account when calculating the due date.

5. Choose one of the following options to specify the application of the special loan period:

- To apply the loan period to the patron’s next item only, select **Apply to next item only**.
- To apply the loan period to all the items for this patron, select **Apply to all items for this patron**.
- To apply the loan period to all items being checked out during the current session, select **Apply to all checkouts**. If you select this option, the setting remains in effect until you click **Reset** on the Checkout workform or close the workform.

6. Click **[OK]** on the dialog box.

7. Scan the item barcode in the Item barcode box, or type the barcode and press **[Enter]**.

**Reset Due Dates of Checked Out Items**

Your library may allow you to change the due dates of selected items after they have been checked out. For example, a patron may realize that they will be out of town on the original due dates, so you make the item due a few days later. You can reset the due dates from the list of checked out items in the Check Out workform or the Items Out view of the Patron Status workform, if you have the appropriate permissions.

1. Select the item or items in the item list of the Check Out workform or the Patron Status workform:

   - **Check Out workform** – Select the items in the list view, then select **Tools**, **Reset Due Date**, click **[ ]** on the toolbar, or press **CTRL+ALT+D**. You can also right click a selected item and select **Reset Due Date** from the context menu.
- **Patron Status workform** – Items Out view – Select the items in the list view and select the Reset Due Date icon above the list view (or press CTRL+ALT+D). You can also right click a selected item and select **Reset Due Date** from the context menu.
2. Select the new date on the calendar, and click [OK]. The new date must be in the future. If the selected date is a closed date or day, the system displays a message, and you can accept the new date or cancel the operation. You may also see messages for the following item blocks: system-assigned blocks; library-assigned blocks; free text blocks; non-circulating item blocks; ILL items. When you click [OK], the calendar closes and the new due date for the item or items are displayed in the item list view.

Checking Out Uncataloged Items (On-the-Fly Records)

Using the On-the-Fly function, you create minimal-level item and bibliographic records, according to the template the library has previously defined. This allows the uncataloged items to be checked out before they are fully cataloged.

A template must be set up for each library. You can always change the settings that have been pre-selected.

1. If you scan or type an item barcode at the Check Out workform and Polaris alerts you that the item is not linked to a record, confirm that you want to create a record on-the-fly by clicking [Yes].
The Brief Item Entry dialog box appears with the new barcode in the Barcode box.

2. Type the title in the **Title** box.

3. Type an author in the **Author** box (last name first), if appropriate.

4. Type a call number in the **Call number** box, if appropriate.

5. If you want to type a note, type the information in the **Free text block**.

6. Review the default settings in the remaining boxes and change them, if necessary. By default, Set OTF Block is checked. When this option is selected, and a previously uncataloged OTF item is checked in, a block message notifies you that it requires full cataloging.
7. Click [OK] to submit the settings.

8. The following note will appear now and again when checking the item in. Click [OK] to continue to the Check Out workform.

Renewing Items

When you renew an item for a patron, the new due date is calculated automatically, based on the library’s standard policies. However, you can also assign a special loan period for the renewal. You can do a renewal from the following locations in Polaris:
Check Out workform – When you attempt to check out an item that has already been checked out to the selected patron, Polaris prompts you for renewal confirmation.

Patron Status workform – Items Out view – If you want to renew one or several items checked out to a patron, you can do the renewal from this location. This method is convenient because you can select and renew multiple items without scanning the barcodes.

Renew Items from the Patron Status workform

Follow these steps to renew items from the Patron Status workform:

1. Open the patron’s record in the Patron Status workform.

2. Select View, Items Out or click to display the Items Out view.

3. After highlighting the title, choose one of the following options:

   - If you are renewing one or multiple items, select the items in the Items Out list, and click or press CTRL+R.

   - If you are renewing all items, click or press CTRL+A.

   - If you are doing a special renewal, select the appropriate items in the Items Out list, and click or press CTRL+E. The Special Loan dialog box appears.

The new due dates are displayed.
If a renewal is not allowed, Polaris will display the following:

Click [Yes] to overwrite the renewal.

Resolve a Fine at Renewal

If your library charges fines for overdues, Polaris automatically calculates the fine amount. When you attempt to renew an overdue item at the Check Out workform or the Patron Status workform – Items Out view, a message indicates that the patron owes a fine for the item. Follow these steps to pay, waive, or charge a fine when you renew an overdue item.

1. Renew an overdue item from one of the following workforms:
   - Check Out workform
   - Patron Status workform – Items Out view

The Overdue Find dialog box appears:
2. If you want to *pay* the fine and allow the renewal, follow these steps:

- Click [Pay]. The Pay dialog box appears:

  ![Pay dialog box]

  - Type the amount to pay in the **Amount box**, if you are paying an amount other than the exact amount of the fine:
    - **Partial Payment** (less than the fine) – The payment will be recorded as a partial payment on the fine, and the Account Transaction list in the patron’s record will show a balance for the charge.
    - **Overpayment** (more than the fine) – If your library allows overpayments to be recorded as account credits, a dialog box appears that alerts you to the overpayment and provides the choice of crediting the account or not. Click [Yes] to credit patron’s account. Click [No] to pay the charge without recording a credit.

If your library does not allow overpayments to be recorded as credits, a message indicates how much change you should give the patron. Click [OK] on the message box.

- Select a payment method in the **Method box**, and click [OK]. A record of the charge and payment appears in the Transaction Summary dialog box for the patron account. If the fine was only partially paid, or if an overpayment was credited, the transactions appear in the Account Transaction lists for the patron account.

3. If you want to *waive* the fine and allow the renewal, click [Waive]. The dialog box closes. A record of the waiver appears in the Transaction Summary dialog box for the patron account.

4. If you want to charge the *fine* to the patron’s account and allow the renewal, click [Charge Account]. The charge appears on the **Patron Status workform – Account view**. To resolve the charge later, you must pay or waive the fine from the Account view.
Estimated Fines

If your library patron has an overdue listed on their account, Polaris can provide an estimate on what the patron would owe if they turned the book in today.

1. After highlighting the overdue title, on the Items Out screen, click on the toolbar. A new screen will appear showing how much this patron would owe if they returned the item today.

2. By clicking on the calendar you can change the date to get a different estimate. For instance, if someone asks you what the fine will be if they returned the item on Monday and today is Friday, pick the new date and click the [Recalculate] button. The new estimate will be displayed.

Note: You can also select all lines that are overdue on the record to get an “estimated total” for all overdue titles.
**Working with Blocks**

Blocks on patron or item records may interrupt check out or renewal. When a patron or item is blocked, a block notification message appears. Authorized library staff can override the block and continue with the transaction. System-generated blocks are applied and removed automatically by Polaris. Staff-generated blocks are applied by a staff member and must be manually removed by a staff member. Staff-generated blocks may be library-assigned or free-text blocks. You can also place a blocking note in a patron record.

Blocks may be associated with a patron record or an item record. Patron blocks indicate that a patron’s account is delinquent according to library policies, that the patron requires special services, or that checking out an item would exceed a library-defined limit on certain materials, groups of materials, or reserve items. Polaris automatically blocks patron records for held items, overdue and long overdue items, money owed over a library-specified amount, accounts in collection, and an excessive number of items claimed. If your library allows self-registration and account updates from the PAC, Polaris blocks patrons with a Verify Patron block, which flags the record for staff review. This block is also placed on patron records created offline. Your library may also place Verify Patron blocks on express registrations created at check out.

Item blocks indicate that an item should not be checked out at all, or that it requires special handling. These include blocks for non-circulating items and items that are being held for another patron, belongs to another library, or has a status other than In, such as On Order, In-transit, Missing, Lost, or Withdrawn. Polaris also blocks items that have notes, and items that were created on-the-fly.

**Patron Blocks in Check Out**

When you check out or renew items for a patron, the Patron Blocks dialog box appears if there are one or more blocks on the patron or on associated records with a blocking relationship. You must take action before you check out to the patron.
1. Do one of the following actions:

- To override the block and continue the transaction, click [Yes]. If the only block is for a held item, you can override the block without special permission.
- To stop the transaction, click [No].
- Select a block to manage and go to step 2. You can use the up and down arrow keys to select a block.

2. With the block selected, press [Enter] or double-click.

The appropriate workform opens. For example, if the block is that the Patron owes money, the **Patron Status workform – Account view** opens. For Verify Patron blocks, the Patron Registration workform opens. For associated patron blocks, the Patron Status workform for the associated patron opens.

3. Resolve the block as necessary:

- For overdue or long overdue blocks, check in the items, make claims, or declare the items lost.
- For amounts owed, resolve the charges.
- For Verify Patron blocks, verify the patron’s account information and save the patron record.
- For unread patron messages, an alert message appears in the Patron Blocks dialog box. You can continue the check out operation or cancel it, and you can also click the block text to open the **Patron Status workform – Notes view**. The alert message does not place any blocks on patron activity in the PAC.
- Delete staff-generated blocks or blocking notes if appropriate.

**Resolve a Verify Patron Block**

Your library may allow patrons to register online through the PAC. The patron receives a temporary barcode to use for placing requests, and a new patron record is created with a Verify Patron block. This block alerts staff that the record needs to be reviewed and a permanent barcode assigned. An automatic e-mail message alerts designated library staff members that a patron has self-registered. A similar process occurs if your library allows patrons to update their account information through the PAC. Your library may also place a Verify Patron block on patron records created through express registration, and on
registrations renewed through Polaris ExpressCheck. Patron records created offline also receive a Verify Patron block. Follow these steps to review a new or updated record, modify it if necessary, and resolve the block.

1. Display the patron’s record in the Patron Registration workform, using one of the following methods:
   - Highlight the Verify patron message in the Patron Blocks dialog box, and press [Enter].
   - On the Shortcut Bar, click Patron Services, Patron Records to find and open the record.

2. If necessary, type or scan a valid patron barcode in the Barcode box.

3. If you want to change the patron code, select another code in the Patron code box.

4. If you want to change the statistical code, select another code in the Statistical class box.

5. Make any additional settings, such as Expiration Date, that your library may require.

6. Select click File, Save on the Shortcut Bar, or , or press CTRL+S to save this record.

7. The Verify Patron block message appears. Click [Remove Block]. The record is saved, and the block is removed.

Add a Patron Block

You can manually add library-defined blocks to a patron record. Authorized staff can also create free-text blocks. Follow these steps to add a block to a patron’s record.

You can also add a blocking note to a patron record. Blocking notes block the patron at normal check out and renewal.

1. Display the patron’s record in the Patron Status workform – General view. The General view includes a list of current blocks. The blocks may be staff-generated or system-generated, such as those for overdues.
2. Click [Add] to display the Patron Block dialog box.

![Patron Block dialog box](image)

3. Add a library-assigned or free-text block:
   
   - To add a library-assigned block, such as Address Correction Required or See Supervisor, click **Library assigned** and select a block in the **Library assigned** box.
   
   - To add a free-text block, click **Free text** and type a block description in the **Free text** box.

4. Click [OK] on the dialog box. The General view appears, and the new block appears in the Block Description list.
Delete a Patron Block

Authorized library staff can manually delete staff-generated blocks. You must select and delete one block at a time. You can also delete a blocking note from the patron record. Follow these steps to delete a patron block from a patron’s record.

1. Display the patron’s record in the Patron Status workform – General view.

2. For staff-generated blocks, follow these steps:
   - Select the block that you want to delete in the Block Description list. You cannot delete system-generated blocks, such as overdues.
   - Click [Delete]. The block is removed from the list.

3. To delete a blocking note, follow these steps:
   - Select View, Notes, or click .
   - Select the text in the Blocking note field, and click [Delete].

Item Blocks at Circulation

At check out, renewal, or check in, the Item Blocks dialog box appears if there are any blocks on the item record. You must take action before you can enter the next item barcode.
Occasionally, you may encounter an item with a status of On Order at circulation. If an item has a status of On Order and it is linked to a purchase order or invoice line item, a message is displayed. You cannot override the block, and you cannot manually change the status in the item record. The item must be received through Acquisitions before it can circulate.

Some item statuses, such as Unavailable or Withdrawn, also prevent an item check out. In this case, you receive an error message, and you must check the item in before you can continue. Follow these steps to manage item blocks at circulation.

1. Do one of the following:
   - To override the blocks and continue the transaction, click [Yes] or press [Enter].
   - To stop the transaction, click [No].
   - To open the item record workform, double-click the block text or click [Item Record] and go to step 2.

2. Resolve the block as necessary (only those with permission to resolve item blocks will be able to do this function).
   - Select View, Notes and Notices on the Item Record workform to see an item’s notes and blocks.
   - Remove Library assigned or Free text blocks if appropriate, and save the record.

CHECK IN

You can check in items by various methods, depending on the situation. For example, you can do a normal check in for a few items left at the desk, or a bulk check in of all the items left in a book drop. You can also use the Check In workform to count the number of items that have been used in the library but not checked out.

When a patron returns an item to the front desk, you typically do a check in using normal mode, Check In workform – Normal view. In certain situations, such as when an item does not have a barcode label, you do not have the item in front of you, or the item record was created with a status other than In, you can check the item in from the Item Record workform. If you are working with a patron record, you can also check in an item from the normal mode, from the item record, or from the Patron Status workform, alerts may appear during processing. For example, an item may have a block on it, or an item may be overdue. When alerts appear, you must decide how the item should be processed.
Check In Messages and Blocks

Messages and blocks may appear during check in:

- **Check In – Fine dialog box** – The Fine dialog box may appear during check in if there is a fine on the item. This is a setting in Polaris that either automatically charges the fine (then no dialog box appears) or if this has not been automatically set to charge the patron, then a dialog box will appear.

- **Item Blocks** – The Item Blocks dialog box appears during check in if there are blocks on an item.

- **Holds Messages** – The following messages related to holds may appear during check in:
  
  o This item satisfies a hold….Do you want to hold the item? You can designate the item to fill the request, or override the request. If you fill the hold, and you have set up printing for hold slips from this workform, the slip is automatically printed. You can reprint a hold slip for a held item by checking in the held item a second time, keeping the Held status for the item.

  o Transfer this item to library for hold? The item fills a hold request for a patron at another library. You can override the hold, or transfer the item. If you transfer the item, and you have set up printing for in-transit slips from this workform, the slip is automatically printed.

- **Resolve Lost/Billed Item Dialog Box** – Your library may set this dialog box to appear when an item has been declared lost, but the item is found at circulation.

- **Circulation Messages** – You may see the following messages related to item circulation:
  
  o Item does not belong to this branch – Your library may set this message to appear when an item does not belong to your branch. If you choose to put the item in-transit to the item’s assigned branch, and you have set up printing for in-transit slips from this workform, the slip is automatically printed.

  o Item was withdrawn – Displayed when the item has been withdrawn from circulation. You can continue to check in the item, or you can cancel the check in.
Free Days at Check In

When an overdue item is checked in, free days are days omitted from the overdue fine calculation so that patrons are not charged for overdues when the library is closed. You can set special free days for normal and bulk check in. For example, if the library was unexpectedly closed for a day due to a storm, you might permit one or two free days. When you set a different number of free days for check in, it applies only to your current check in session.

Normal Check In

You typically use this method when a patron returns items to the circulation desk. Follow these steps to check in items from the Check In workform – Normal view:

1. Selection Circulation, Check In from the Shortcut Bar, click or press F2 to display the Check In workform.

2. Click , or select, View, Normal Mode. The Check In workform – Normal view appears.

3. Set the number of free days in the Free days box, if you want to use a different value or you can pick a date using a calendar.

4. Enter item information using one of the following methods:
• Scan the item barcode in the **Item barcode** box, or type the barcode and press [Enter].

• To find an item without a working barcode, click the [Find] button next to the **Item barcode** box to display the Find Tool and search for the item record.

The item barcode, due date, status, and comments appear in the list of items checked in.

5. Repeat the previous step until you have checked in all the items. The status bar displays the total number of items checked in.

6. If you want to print a check in receipt, follow these steps:
   a. Select the items that should appear on the receipt.
   b. Select File, Print, Check In Receipt.

If items are selected from multiple patrons, the items are grouped by patrons, and three blank lines are added at the end of each group. If auto-cut receipt printing is enabled, the receipt is cut at the end of each patron’s group of items.

*Check In Messages During Normal Check In*

During normal check in you may see the following:

• The Fine dialog box may appear during check in if there is a fine on the item. Each library can decide whether or not overdue fines are automatically charged to the patron account when overdue items are checked in.

• The Item Blocks dialog box appears during check in if there are blocks on an item. An example would be to check for so many CDs in an audiobook.

• **This item satisfies a hold….Do you want to hold the item?** You can fill or override the request. If you override it, a message asks if you want to reactivate the hold request for the patron whose hold request was overridden. If you fill the hold, and you have set up printing for hold slips from this workform, the slip is automatically printed.

• **Transfer this item to library for hold?** The item fills a hold request for a patron at another library. You can override the hold, or transfer the item. If you transfer the item, and you have set up printing for in-transit slips from this workform, the slip is automatically printed.

• **Resolve lost/billed item dialog box** – This dialog box appears when an item has been declared lost, but the item is found at circulation.
• Circulation Messages – You may see the following messages related to item circulation:
  o **Item does not belong to this branch** – If you choose to put the item in-transit to the item’s assigned branch, and you have set up printing for in-transit slips from this workform, the slip is automatically printed.
  o **Item was withdrawn message** – Displayed when the item has been withdrawn from circulation. You can continue to check in the item, or you can cancel the check in.
  o **Course reserve messages** – If your library uses course reserves, and an item is on reserve for a course, a message informs you that the item is on reserve. You may also see a message if the reserve item is intended for use in the library only. Click [OK] and put the items in the appropriate areas for reserve items.

**Resolve a Fine at Check In**

Fines for overdues, if any, are calculated automatically. When you attempt to check in an overdue item, a Fine dialog box indicates that a fine is being charged. The fine amount in the dialog box shows an amount related to the item you are checking in. The dialog box warns you if the patron owes additional money not related to this item. The library can also choose to have fines automatically charged to their patron accounts. If that is the choice of the library, the fine box below will not appear.

![Check In - Fine dialog box](image)

Follow these steps to pay, waive, or charge a fine to a patron’s account when you check in an overdue item. Note: A library can choose to automatically access overdue fines to a patron’s record.

1. (Optional) Change the amount of the fine, if necessary, by typing a new amount in the **Fine** box.

2. Choose one of the following options:
To check in the item and confirm that the patron owes money, but you will process the fine later, click [Continue]. The fine appears in the **Pending Patron Account Transactions** list. Each entry in this list displays the total amount of all fines for that patron. If one patron has returned several overdue items, it does not list each individual fine. Before you can close the Check In workform, you must resolve each patron’s fine by paying, waiving, or charging the patron’s account.

![Pending Patron Account Transactions](image)

To check in the item and waive the fine, click [Waive]. A record of the waiver appears in the Transaction Summary box for the patron account. If you set Polaris for fine receipt printing at the **Check In workform**, a fine receipt prints.

To check in the item and charge the fine to the patron’s account, click **[Charge Account]**. The charge is listed on the **Patron Status workform** – **Account view**, where you can pay or waive the charge later.

3. If you clicked **[Continue]**, and you are ready to process the fine, select patron line item in the **Pending Patron Account Transactions** list.

4. If you want to charge the selected line item to the patron’s account, click **[Charge New]** on the right side of the **Pending Patron Account Transactions** list. The line item no longer appears in the list. The charge appears on the **Patron Status workform** – **Account view**, where you can resolve the charge later.

5. If you want to pay the selected line item, follow these steps:

   a. Click **[Pay New]** on the right side of the **Pending Patron Account Transactions** list. The Pay dialog box appears:
b. Type the amount to pay in the **Amount** box (maximum $2,000,000.00), if you are paying an amount other than the exact amount of the line item:

- **Partial payment** (less than the line item amount) – If the line item represents a single charge, the payment will be recorded as a partial payment on the charge, and the Account Transaction list in the patron’s record will show a balance for the charge. If you are making a partial payment on multiple charges, the payment amount is applied to the oldest charge first.

- **Overpayment** (more than the line item amount) – If your library allows overpayments to be recorded as account credits, a dialog box appears that alerts you to the overpayment and provides the choice of crediting the account or not. Click **[Yes]** to credit the patron’s account. Click **[No]** to pay the charge without recording a credit. Click **[Cancel]** if you entered the wrong amount. If your library does not allow overpayments to be recorded as credits, a message indicates how much change you should give the patron. Click **[OK]** on the message box.

c. Select a payment method in the **Method** box, and click **[OK]**. The line item no longer appears in the list. However, a record of the charge and payment appears in the Transaction Summary dialog box for the patron account. If any charges were only partially paid, or if an overpayment was credited, the transactions appear in the Account Transaction list for the patron account. If you set Polaris for fine receipt printing at the Check In workform, a fine receipt prints. You can also opt to print the fine receipt only for patrons who do not receive eReceipts.

6. If you want to waive the selected line item, follow these steps:

a. Click **[Waive New]** on the right side of the **Pending Patron Account Transactions** list. The Waive dialog box appears.
b. Type the amount to waive in the **Amount** box (maximum $2,000,000.00), if you are waiving an amount other than the exact amount of the line item:

- **Partial waive** (less than the line item amount) – For a partial waive on a single charge, the transaction will be recorded as a partial waive on the charge, and the Account Transaction list in the patron’s record will show a balance for the charge. If you are making a partial waive on multiple charges, the waived amount will be applied to the oldest charges first.

- **Distributed waive** – If you want to apply the same waived amount to each of multiple charges, select (check) the Distributed Waive check box, and type an amount to waive. If your library does not allow distributed waives, this option is not available for selection. The line item no longer appears in the list. However, a record of the waiver appears in the Transaction Summary dialog box for the patron account.

c. Click **[OK]** on the dialog box. If you set Polaris for fine receipt printing at the Check In workform, a fine receipt prints. You can also opt to print the fine receipt only for patrons who do not receive eReceipts.

7. To resolve other charges on this patron’s record, click **[Manage All Fines]** on the right side of the **Pending Patron Account Transactions** list. The **Patron Status workform** – **Account** view opens.

**Change Item Information or Barcode at Check In**

Your library may allow you to change an item’s collection, shelf location, material type, circulation status, blocks, non-public note, or barcode from the Check In workform. To be eligible, for these changes, the item’s circulation status must be In, and the item’s assigned branch must be the same as your workstations’ logged-in branch. Follow these steps to make these changes.

1. In the Check In workform listview, select the item or items you need to change.

2. To change the circulation status, shelf location, library-assigned block, free-text block, non-public note, material type, or collection, follow these steps:

   a. Select **Tools, Manage Item**, click 
      , or press **CTRL+M**. The Manage Item Record dialog box opens.
b. Select the check boxes for the fields you want to change, and select the new options from the lists. You can type information in the **Non-public note** and **Free text block** fields.

c. Click **Save**. The dialog box closes, and the item record is updated with your changes.

3. To change the barcode, follow these steps:

   a. Select **Tools, Replace Barcode**, click 📦, or press **CTRL+B**. The Replace Barcode dialog box opens.
b. Type or scan the new barcode in the box. The new barcode cannot be blank.

c. Click [Save]. The dialog box closes, and the item record is updated with your change.

**Bulk Item Check Ins**

When you want to do a fast check in of many items, such as those left in the book drop, use the bulk check in process. Items are processed more quickly because most blocks and dialog boxes do not appear. For example, overdue fines are charged automatically to patron accounts. However, an alert will appear for hold requests and held items.

*Check in Items in Bulk*

Follow these steps to check in many items quickly, in bulk mode.

1. Selection **Circulation, Check In** from the Shortcut Bar, click or press F2 to display the **Check In** workform.

2. Click , or select, **View, Bulk Mode**. The **Check In workform – Bulk view** appears.

![Image of Check In workform with bulk mode activated](image_url)
3. Set the number of free days in the Free days box, if you want to use a different value or you can pick a date from a calendar.

4. Enter item information using one of the following methods:
   - Scan the item barcode in the Item barcode box, or type the barcode and press [Enter].
   - To find an item without a working barcode, click the [Find] button next to the Item barcode box to display the Find Tool and search for the item record. The item barcode, due date, status, and comments appear in the list of items checked in.

5. Repeat the previous step until you have checked in all the items. The status bar displays the total number of items checked in.

*Check In Messages During Bulk Check In*

During bulk check in you may see the following:

- **This item satisfies a hold….Do you want to hold the item?** You can fill or override the request. If you override it, a message asks if you want to reactivate the hold request for the patron whose hold request was overridden. If you fill the hold, and you have set up printing for hold slips from this workform, the slip is automatically printed.

- **Transfer this item to library for hold?** The item fills a hold request for a patron at another library. You can override the hold, or transfer the item. If you transfer the item, and you have set up printing for in-transit slips from this workform, the slip is automatically printed.

- **Resolve lost/billed item dialog box** – This dialog box appears when an item has been declared lost, but the item is found at circulation.

*Working with Claims and Lost Items*

You assign a claim status to an item when Polaris shows that an item is out, but the patron claims that they returned the item (Claim Returned) or never had the item (Claim Never Had). Polaris keeps track of a patron’s current claims and the total number of claims the patron has ever had.

The library sets limits for current and total claims. If a patron exceeds these limits, circulation is blocked for that patron. If you have the appropriate permission, you can reset a patron’s total claim count so that the patron record is not permanently blocked.
Settings also control whether fines are charged when an overdue claimed item is checked in or checked out.

**Make a Claim**

Follow these steps to assign a claim status to a patron’s checked out item.

1. Display the patron’s record in the **Patron Status** workform.

2. Select **View, Items Out** or click ![View icon] to display the **Items Out** view.

3. Select the appropriate items or items from the Items Out list, and click ![Select items] above the list or press **CTRL+M**. To select more than one item, press **CTRL** and click the items.

4. The Make Claim dialog box appears. Select a claim status (Claim Returned or Claim Never Had) in the Status box and click **OK**. The Items Out view appears. The item or items no longer appear in the Items Out list because the item status has changed.
5. If a message appears asking if you want to apply the claim status to all selected items, click [OK] to confirm that you want to apply the status.

Managing Lost Items

You can declare an item lost in the following situations:

- A patron notifies the library that a checked out item is lost. A bill has not been sent, and the account has not been charged.

- A patron has received a bill for an overdue item, and the patron notifies the library that the item is lost. The patron’s account has already been charged, but the charges have not been resolved (paid or waived).

Charges for lost items may include the replacement charge, a processing fee, and overdue charge, if any. Your library may or may not place overdue charges on lost items. If an item is declared lost, but is later found at check in, check out, or renewal, you may resolve any charges connected with the item, or your library may set up automatic processing to manage the charges.

1. Display the patron’s record in the Patron Status workform.

2. Select View, Items Out or click ![Items Out](view_image.png) to display the Items Out view.

3. Select the appropriate line item in the Items Out list.

4. Click ![Declare lost item button](declare_button.png) or press CTRL+L to display the Declare lost item dialog box.
The Declare lost item dialog box appears:

If the patron has already received a bill for the item, the **Billed** check box is selected. If the item is not overdue, or your library does not charge for overdues, all the **Overdue** boxes are unavailable.

5. Manage the replacement charge by following these steps:

   - To change the replacement amount, type the new amount in the **Replacement Amount** box. This allows you to process a partial payment. It does not change the amount of the charge.
   - Select **Charge, Pay or Waive** in the Replacement Actions box. Charge places the charge on the patron’s account. If you selected Pay, then select a payment type in the **Payment method** box.
   - For a billed item, the options are **Leave as is, Pay** or **Waive**. The charge has already been posted to the patron’s account.

6. Manage the processing fee, if any, by following these steps:
• If you want to change the amount, type the new amount in the **Processing Amount** box. This allows you to process a partial payment. It does not change the amount of the charge.

• Select **Charge, Pay, or Waive** in the **Processing Actions** box. Charge places the charge on the patron’s account. If you selected **Pay**, then select a payment type in the **Payment method** box.

7. If there is an overdue charge, manage the charge by following these steps:

• If you want to change the overdue amount, type the new amount in the **Overdue Amount** box. This allows you to process a partial payment. It does not change the amount of the charge.

• Select **Charge, Pay, or Waive** in the **Overdue Actions** box. Charge places the charge on the patron’s account. This option may be unavailable if your library charges the overdue fine only when a lost item is recovered. If you selected **Pay**, then select a payment type in the **Payment method** box.

8. Click **[OK]** on the dialog box. The **Items Out** view appears, but the item declared lost no longer appears in the Items Out list. If you paid or waived an amount and you set Polaris to print fine receipts from the Patron Status workform, a receipt prints.

After an item is declared lost, patron and item records are automatically updated:

• The transaction is displayed on the **Patron Status workform – Account** view or the **Transaction Summary** dialog box, and lost item is listed on the Patron Status workform – Claims view.

• If the patron’s account was charged a replacement cost, and the cost was not paid or waived, the Lost item counter is incremented on the **Patron Status workform – General** view and the **Patron Status workform – Claims** view. You may need to refresh, press F5, the view to see the change.

• The patron barcode is moved to the **Previous borrower** box on the Item Record workform – Circulation view.

• The item circulation status changes to **Lost**.

• Any hold request status for the item changes to **Not-supplied**.

• Lost item counter – The count in the **Lost item counter** on the Patron Status workform – General view and the Patron Status workform – Claims view increases when a replacement cost for an item is charged to the patron’s account. When the charges related to the item are paid, waived, or otherwise resolved, the count decreases.
Resolve a Lost and Unpaid Item at Circulation

During check in, check out, or renewal, the Resolve lost item dialog box may appear if the item has been declared lost. Follow these steps if an item has been declared lost, the item has been charged (but not paid for or waived), and the item is found at circulation.

1. Select a payment action in the Replacement Actions box:
   - **Waive** – Select this to waive or partially waive the replacement amount.
   - **Leave as is** – Select this to do nothing with the patron’s account.

2. If there is a processing fee, select a payment action in the Processing Actions box:
   - **Waive** – Select this to waive or partially waive the processing amount.
   - **Leave as is** – Select this to do nothing with the patron’s account.

3. If there is an overdue charge, select a payment action in the Overdue Actions box:
• **Pay** – Select this to pay or partially pay the overdue amount. You must select a payment method in the Payment Method box.

• **Waive** – Select this to waive or partially waive the overdue amount.

• **Leave as is** – Select this to do nothing with the patron’s account. The circulation process (check in, check out, or renewal) is completed.

4. Click **[OK]** on the dialog box.

• The item circulation status changes from Lost to In.

• On the Patron Status workform, paid and waived amounts appear in the Transaction Summary dialog box (Account view), and the lost item counter decrements (General view and Claims view). The item is removed from the claimed items list (Claims view).

• If you set Polaris for fine receipt printing at the current workform, then a receipt prints.

### Resolve a Lost and Paid Item at Circulation

Follow these steps if an item has been declared lost, the item has been paid for, and the item is later found at circulation.

1. Select one of the following options in the Replacement Actions box:

   • **Credit** – Select this to credit the patron’s account. The credit can be applied to current or future charges. Use this option if the patron is not present when the item is found, and then notify the patron.

   • **Refund** – Select this to refund the patron’s money.

   • **Leave as is** – Select this to do nothing with the patron’s account. The circulation process (check in, check out, or renewal) is completed.

2. Select one of the following options in the **Processing Actions** box:

   • **Credit** – Select this to credit the patron’s account. The credit can be applied to current or future charges. Use this option if the patron is not present when the item is found, and then notify the patron.

   • **Refund** – Select this to refund the patron’s money.

   • **Leave as is** – Select this to do nothing with the patron’s account. The circulation process (check in, check out, or renewal) is completed.

3. If there is an overdue charge, select a payment action in the **Overdue Actions** box:

   • **Pay** – Select this to pay or partially pay the overdue amount. You must select a payment method in the Payment Method box.
- **Waive** – Select this to waive or partially waive the overdue amount.
- **Leave as is** – Select this to do nothing with the patron’s account. The circulation process (check in, check out, or renewal) is completed.

4. Click [OK] on the dialog box.

- The item circulation status changes from Lost to In.

**Patron Status and Accounting**

The Patron Status workform is the first place to look when patrons have questions about their accounts. You can view and print the patron’s current items out, and confirm the notices a patron has received regarding an item. This workform is also the central point for patron accounting. It tracks each patron’s financial transactions with the library, including charges, payments, deposits, and credits. You can also view a history of the patron’s account activity.

**Displaying All Items Out**

From the **Patron Status workform – Items Out** view, you can view and print all the items that a patron currently has checked out. The Items Out list displays each item’s basic information and includes the due date and time, call number, material type, and assigned branch. By default, the list is sorted and prints by due date (oldest to most recent). You can sort the list on other fields by clicking the column headers.

**Display and Print the Items Out list**

Printing the Items Out list provides the patron with a verification of all the items he or she has currently checked out and a backup receipt in case the check out receipt was lost. Follow these steps to display and print the Items Out list from the Patron Status workform.

1. Open the patron’s record in the **Patron Status** workform. Note: From the Check Out workform, select **Links, Patron Status**, or **ALT-F9** or click .

2. If needed, select **View, Items Out** or click to display the Items Out view.
Overdue items are marked with the Alert icon !. You can see more information about any item in the Items Out list. Right-click the item and select Open from the context menu to open the item record. Or select Links from the context menu to see choices related to circulation, holds, bibliographic, and other information.
3. Click the printer icon above the **Items Out** list (not the icon at the top of the workform), or press **CTRL+ALT+P**, to print the list.¹

If the workform printer is set to Receipt, the list is printed. If the printer is set to Page, the **Report Preview** window opens. Click the printer icon the Report Preview window to print the list.

**Reviewing Notice Histories**

The notice history is a list of the notices that have been sent to a patron regarding a specific item. The list includes the notification method, the date, notification organization, and the amount of any related charges. If the notice was delivered by email, text message, or telephone, the notice history also indicates whether the delivery was successful. When the item has been checked in and all charges have been resolved, the notice history for that item is no longer available.

Your library sets separate retention periods for hold notices (pick up and cancelled hold notices) and item and account notices (overdue, fine, bill, and reminder notices). An entry is kept in the notification history if it falls within the specified period of time, the related item is still checked out, claimed or lost by the current patron, and current charges are not resolved. The entry is kept under these circumstances even if the related item is purged or deleted from the database, as an example, the title is prefixed by [Deleted].

**Display and Print Notice Histories**

Follow these steps to display and print the notice history.

1. Open the patron’s record in the **Patron Status** workform – **General view** or **Patron Registration** workform – **Status view**.
2. To open a notice history, double-click an item in the **Notices** list, or right-click the item and select **Open** from the context menu.
3. To print multiple notice histories in the **Patron Status – General view**, select the items in the patron’s Notice list and right-click. Then select **Print** from the context menu.
4. To open a related item record, right-click an item in the list and select **Item Record** from the context menu.

**Viewing Patron Financial Accounts**

Patron accounting includes charging fines and fees to patrons and reconciling these charges. The library can charge patrons for overdue, lost, and damaged items, and for

¹ A printer or receipt printer must be set up for the first time after installation of Polaris or whenever you want to change the default printer.
special services. From the **Patron Status workform – Account view**, you can view a patron’s outstanding charges, deposits, and credits, and take appropriate action.

The bottom portion of the workform displays the account transaction list. Each line item in the list includes the transaction’s date, type, and amount, as well as the current balance for the transaction. A line item may also contain a reason for the transaction, an associated title, a barcode, and notes. Replacement and overdue charges are in separate line items.

By clicking the appropriate button in the Line Item Tool Bar above the Account Transaction list, you can do financial transactions and access a summary of completed transactions. Place your cursor over any button to see a tooltip that identifies the button’s function.

You can see a list of notices that have been sent for an item. Select the item in the Account Transaction list and click (or press ALT+N). The Notice History dialog box opens. You can print the notice history.
At the bottom of the Account view, the Charges, Deposits, and Credits boxes track total amounts on the patron’s account, and increase or decrease according to the account transactions. The amount of the balance is the total of all charges minus the total of any credits. If the patron’s charges exceed any credits, the amount is displayed as a positive number. If the total credit amount is greater than the total charges, the amount is displayed in parentheses.

**Access the Account Data for a Patron Record**

Follow these steps to display the Account view of a patron’s record.

1. Open the patron’s record in the Patron Status workform, using one of these methods:
   - From the Patron Registration workform, press F9.
   - From the Shortcut Bar, select Circulation, Patron Status (or press F6).

   The Patron Status workform opens to the Items Out view.

2. Select **View, Account** or click to display the Account view.

**Display Completed Account Transactions**

Polaris automatically moves all completed transactions from the Account Transaction list to the Transaction Summary dialog box, where they are archived for a set period.
Follow these steps to view the archive of a patron’s completed monetary transactions.

1. Open the patron’s record in the Patron Status workform.

2. Select View, Account or 📊 to display the Account view.

3. Click ⬆️ above the Account List view, or press CTRL+T.

   The Transaction Summary dialog box appears. All reconciled transactions are listed in the dialog box for a set period. Note: The following transactions remain in the transaction summary, regardless of the Administration setting for deleting transactions: payments that have been refunded or credited; deposits that have been credited; any transaction associated with a credit; any transactions that occur for patrons currently in collection.

![Transaction Summary dialog box]

4. To sort the line items, click the appropriate column header.

   You may find it helpful to sort the Transaction Summary by title or barcode to group the charges, payments, and waivers for a particular item. You can open a linked item record from the Transaction Summary. Right-click the line item in the Transaction Summary dialog box, select Links from the context menu, then Item Record.

**Display a Transaction’s History**

You can view the account activity for any selected item in the Account Transaction list or the Transaction Summary dialog box. Follow these steps to view the account activity for a particular transaction.
1. Open the patron’s record in the Patron Status workform – Account view.

2. If the transaction has been reconciled, click or press **CTRL+T** to display the Transaction Summary dialog box.

3. Right-click the transaction line item, and select History from the context menu.

The **Transaction History** dialog box appears.

In this example, the Transaction History dialog box shows the charge associated with the Pay line item in the transaction list.

You can view additional information about each transaction, including an item’s check out date and due date if applicable. Right-click a line item in the Account Transaction list or the Transaction Summary dialog box, and select **Properties** from the context menu.

**Related Information**

Patrons are automatically blocked at check out and renewal under the following circumstances:

- They owe more than a library-specified amount of money.
• They have more than a library-specified number of items overdue.
• They have one or more items long overdue.

For most items, the item record identification (title and barcode) is still available after the item has been deleted, so charge and pay or waive transactions remain related to the item.

**Processing Charges and Payments**

Charges include fines, replacement costs, and any other fees that a library chooses to implement. Some charges are automatically assigned to patron accounts. The system calculates and assigns charges when an item is manually declared lost, an overdue item is billed, and when any overdue item is recovered at check in, check out, or renewal. These charges are determined by the settings for your library. In addition, you can manually assign a charge at any time, such as for a damaged item.

With the appropriate permissions, you can reconcile current charges in a patron account by paying them or waiving them, you can issue refunds or credits on completed transactions, and you can manually create a credit in a patron’s account.

**Create a Charge from the Account View**

You typically associate a charge with a predefined reason (such as item damage or a special service).

Follow these steps to manually create a charge on a patron’s record.

1. Open the patron’s record in the **Patron Status workform – Account view**.

2. Click above the Account list view, or press **CTRL+C**. The Charge dialog box appears.
3. Type the amount you want to charge in the **Amount** box.

4. Select a reason for the charge in the **Reason** box.

5. If the charge is associated with an item, scan the item barcode in the **Associated Item** box. You can click **[Find]** to search for an item record, if needed.

6. If you want to add a note, type it in the **Notes** box.

7. Click **[OK]** on the dialog box.

The Patron Status workform – Account view appears. A charge appears in the Account Transaction list, and the total amount of account charges appears in the **Charges** box at the bottom of the view. If the charge is a replacement charge for a lost item, the count in the Lost item counter increases.

**Pay Charges from the Account View**

You can pay a single charge, selected charges, or all charges in a single transaction. You can also do a partial payment, or accept an overpayment. Follow these steps to pay charges on a patron’s account.

1. Open the patron’s record in the **Patron Status workform – Account view**.

2. Choose one of the following options:

   • To pay one or multiple charges, select the charge or charges in the Account Transaction list, and click ![Select](image) or press **CTRL+E**.

   • To pay all charges, click ![Select](image) or press **CTRL+L**.

The Pay dialog box appears.
3. If you want to partially pay the selected charge or charges, type the new amount in the **Amount** box.

4. If you want to accept an overpayment, follow these steps:

   - If your library allows overpayments to be recorded as account credits, a dialog box appears that alerts you to the overpayment and provides the choice of crediting the account or not. Click [Yes] to credit the patron’s account. Click [No] to pay the charge without recording a credit.

   ![Image of overpayment dialog box]

   - If your library does not allow overpayments to be recorded as credits, a message indicates how much change you should give the patron. Click [OK] on the message box.

5. Select a payment method in the **Method** box.

   - Use the method **Collection Agency** to record a payment that a patron has made directly to a collection agency (use this feature only if your library is utilizing a collection agency).

   - The method **Pay from Credits** is available only if there is a credited amount on the patron’s account.

   - Credit card payments must be set up to use.

6. If you want to add a note about the transaction, type the information in the **Note** box.

7. Click [OK] on the Pay dialog box. The Patron Status workform – Account view appears, and the amount in the Charges box decreases. The following situations may occur:
• If a charge was only partially paid, the charge still appears in the Account Transaction list with the balance in the Balance column. The payment appears in the Transaction Summary dialog box.
• If charges are paid in full, they no longer appear in the Account Transaction list. Instead, they appear in the Transaction Summary dialog box, along with payments.

If you paid multiple charges, each charge line item has a corresponding pay line item. If you have set Polaris to print fine receipts from the Patron Status workform, a receipt is printed.

![NOTE]

If you are making a partial payment on a single charge, the payment will be recorded as a partial payment on the charge, and the Account Transaction list will show a balance for the charge. If you are making a partial payment on multiple or all charges, the payment amount is applied to the oldest charges first. Each paid transaction is removed from the Account Transaction list, and recorded in the Transaction History. Any remaining amount is applied to the next most recent charge as a partial payment.

**Waive Charges from the Account View**

From the Account View, you can waive a single charge, selected charges, or all charges in a single transaction if you have the appropriate permissions. You can also waive part of a charge, or apply one waive amount to each of several charges. Follow these steps to waive charges on a patron’s account.

1. Open the patron’s record in the Patron Status workform – Account view.
2. Choose one of the following options:
   • To waive one or multiple charges, select the charge or charges in the Account Transaction list, and click **[ ]** or press CTRL+W.
   • To waive all charges, click **[ ]** or press CTRL+V.

The Waive dialog box appears.
3. To partially waive the selected charge or charges, type the new amount in the **Amount** box.

4. To add a note to the transaction, type the information in the **Note** box.

5. Click **[OK]** on the Waive dialog box. The Patron Status workform – Account view appears, and the amount in the **Charges** box decreases. The following situations may occur:

   - If a charge was only partially waived, then the charge still appears in the Account Transaction list with the balance due in the Balance column. The waiver appears in the Transaction Summary dialog box.

   - If charges were waived in full, then they no longer appear in the Account Transaction list. Instead, they appear in the Transaction Summary dialog box, along with the waivers.

If you waived multiple charges, each charge line item has a corresponding waive line item. If you have set Polaris to print fine receipts from the Patron Status workform, and your library has set Polaris to print fine receipts for waive transactions, a receipt prints.

**NOTE!**

If you are making a partial waive on a single charge, the transaction will be recorded as a partial waive on the charge, and the Account Transaction list will show a balance for the charge. If you are making a partial waive on multiple or all charges, the waived amount will be applied to the oldest charges first. Each waived transaction is removed from the Account Transaction list, and recorded in the Transaction History. Any remaining amount is applied to the next oldest charge as a partial waive.
Create a Credit Manually

From the Patron Status workform – Account view, you can create a credit that is unrelated to any specific charge or overpayment. Follow these steps to create a credit manually.

1. Open the patron’s record in the Patron Status workform – Account View.

2. Select $ above the Account Transaction list, press CTRL+B.

The Create Credit dialog box appears.

3. Type the credit amount in the Amount box.

4. Select a payment method for the credit in the Method box.

5. If you want to add a note, type the information in the Note box.

6. Click [OK] on the dialog box. The credit is added to the Account Transaction list, and the amount is added to the total in the Credits box with parenthesis around it to indicate a negative amount. The Balance will also change to reflect the credit.

Refund a Credit Amount

From the Patron Status workform – Account view, you can partially or fully refund credit transactions. Follow these steps to refund credits.

1. Open the patron’s record in the Patron Status workform – Account View.

2. Select one or more credit transactions to refund in the Account Transactions list.

3. Select $ above the Account Transaction list, press CTRL+G.
The Refund Credit dialog box appears.

![Refund Credit Dialog Box](image)

4. Type the amount to refund in the **Amount** box. If you selected credit transactions, and you specify an amount less than the amount shown in the Balance box, the refund is applied to the oldest transactions first. Each fully-refunded credit transaction will be removed from the Account Transaction list, and recorded in the Transaction History. Any remaining amount is applied to the next oldest credit in the Account Transaction list as a partial refund.

5. If you want to add a note, type the information in the **Note** box.

6. Click [**OK**] on the dialog box. The refund is added to the Account Transaction list, and the amount is subtracted to the total in the **Credits** box.

**Refund or Credit Completed Payment Transactions**

Completed transactions are moved to the Transaction History, but you can refund or credit payments even after they are complete. You can refund or credit a single payment, multiple payments, or all payments in a single transaction. You can also do a partial refund or credit. Follow these steps to refund or credit payments for completed transactions on a patron’s account.

1. Open the patron’s record in the **Patron Status workform – Account view**.

2. Click ![green_tick]^1^ or press **CTRL+T** to display the Transaction Summary dialog box. All reconciled transactions appear.

3. Select the appropriate payment or payments in the list.

4. Choose one of the following options:
• To refund a payment or payments, right-click and select **Refund** from the context menu. The **Refund** dialog box appears.

[Image of Transaction Summary window showing refund options]

• To credit a payment or payments, right-click and select Credit from the context menu. The **Credit** dialog box appears.

[Image of Transaction Summary window showing credit options]
5. If you want to partially refund or credit the amount, type the new amount in the Amount box.

6. If you want add a note to the transaction, type the information in the Note box.

7. Click [OK] on the dialog box. The Transaction Summary appears. A refund line item appears in the Transaction Summary list, but a credit line item appears in the Account view’s Account Transaction list. Any credit amount is added to the total in the Credits box at the bottom of the Account view. If you refunded or credited multiple payments, each payment line item has a corresponding refund or credit line item.
# APPENDIX A
Patron Services/Circulation Shortcut and Function Keys

## General

<table>
<thead>
<tr>
<th>Function</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workform Help</td>
<td>F1</td>
</tr>
<tr>
<td>Find Tool – Patron Registration workform (online only)</td>
<td>F7</td>
</tr>
<tr>
<td>Find Tool – Patron Registration workform (from workform)</td>
<td>CTRL+O</td>
</tr>
<tr>
<td>Find Tool – Patron Status workform (online only)</td>
<td>F6</td>
</tr>
<tr>
<td>Find Tool – Patron Status workform (from workform)</td>
<td>CTRL+O</td>
</tr>
<tr>
<td>New workform</td>
<td>CTRL+N</td>
</tr>
<tr>
<td>Close workform</td>
<td>ALT+F4</td>
</tr>
<tr>
<td>Save record</td>
<td>CTRL+S</td>
</tr>
<tr>
<td>Delete record</td>
<td>CTRL+D</td>
</tr>
<tr>
<td>Cycle from one workform view to the next</td>
<td>CTRL+TAB</td>
</tr>
<tr>
<td>Open the Tools Options dialog</td>
<td>CTRL+T</td>
</tr>
<tr>
<td>Switch between patron registration/patron status</td>
<td>F9</td>
</tr>
<tr>
<td>Properties</td>
<td>F8</td>
</tr>
</tbody>
</table>

## Print

<table>
<thead>
<tr>
<th>Function</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print current view</td>
<td>CTRL+P</td>
</tr>
<tr>
<td>Print current list view</td>
<td>CTRL+SHIFT+P</td>
</tr>
</tbody>
</table>

## Record Sets

<table>
<thead>
<tr>
<th>Function</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>New record set</td>
<td>CTRL+N</td>
</tr>
<tr>
<td>Find Tool – Record Set workform</td>
<td>CTRL+O</td>
</tr>
<tr>
<td>Load all records in Find Tool results set</td>
<td>CTRL+SHIFT+A</td>
</tr>
<tr>
<td>Add member by searching</td>
<td>CTRL+E</td>
</tr>
<tr>
<td>Add member by scanning</td>
<td>CTRL+K</td>
</tr>
<tr>
<td>Bulk Change</td>
<td>CTRL+B</td>
</tr>
<tr>
<td>Save record set</td>
<td>CTRL+S</td>
</tr>
<tr>
<td>Close workform</td>
<td>ALT+F4</td>
</tr>
<tr>
<td>Delete record set</td>
<td>CTRL+D</td>
</tr>
<tr>
<td>Properties</td>
<td>F8</td>
</tr>
</tbody>
</table>

## Check Out

<table>
<thead>
<tr>
<th>Function</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Check Out workform</td>
<td>F3</td>
</tr>
<tr>
<td>Find patron</td>
<td>CTRL+R</td>
</tr>
<tr>
<td>Previous patron barcode</td>
<td>F4</td>
</tr>
<tr>
<td>Find item</td>
<td>CTRL+I</td>
</tr>
<tr>
<td>Find bibliographic record</td>
<td>CTRL+B</td>
</tr>
</tbody>
</table>
Create quick-circ item  
Place a hold  
Special loan  
Reset due date  
Patron Registration workform  
Patron Status General view  
Patron Status Items Out view  
Patron Status Account view  
Patron Status Claims view  
Patron Status Holds view  
Patron Status Reader Services view  
Patron Status Association view  
Patron Status Notes view  
Express-register patron  
RFID check-out  
Smart card check-out

**Check In**

Open Check in workform  
Find patron  
Place a hold  
RFID check-in  
Change an item’s circ status or shelf location  
Change an item’s barcode

**Check In – Inventory**

Load barcode file

**Patron Registration – All**

Check out  
Place hold

**Patron Status – All**

Check out  
Place hold

**Patron Status – Items Out**

Renew  
Renew All  
Special Renew  
Make Claim
Declare Lost
Print items out list to a receipt printer
Place a hold
View an item’s notice history

Patron Status – Account

Charge
Pay
Pay All
Waive
Waive All
Deposit
Return
Forfeit
Credit (from deposit)
Create credit
Refund credit
Transaction Summary
View an item’s notice history

Patron Status – Holds

Add to Group
Remove from Group

Patron Status – Associations

Add
Edit
Delete

Patron Status – Claims

Reset total claims

Request Manager

Close workflow
Refresh

Hold Request Shortcuts

New Request
Convert to ILL
Deny Hold
Cancel
Reactivate
Delete
Properties

**Hold Request Workform**

New Request (new patron, new title)  CTRL+N
New Request (new patron, same title)  CTRL+G
New Request (same patron, new title)  CTRL+H
Save
Properties  F8
Refresh  F5
Delete  CTRL+D
Convert to ILL  CTRL+I
Deny Hold  CTRL+R
Cancel Hold  CTRL+L
Reactivate  CTRL+A
Fill Request Now  CTRL+F
Options  CTRL+T

**Multi-request Patron View**

Add patron  CTRL+R
Remove patron  CTRL+E
Add title  CTRL+T
Remove title  CTRL+M

**Holds Queue Workform**

Save  CTRL+S
Refresh  F5
New Request  CTRL+H
Move Up  CTRL+U
Move Down  CTRL+W
Move Top  CTRL+T