

Item Owning Library (Your Item)

Requesting, transit, and checkout are still exactly the same.

Run Overdue Notices (daily)

Overdue notices will be created at 5 and 10 days overdue (previously 5 and 15). *This happens automatically as long as you run your notices.*

(If you do not run notices daily, then patrons are not reminded that your items are overdue and are less likely to remember to return them. Even if you have a system for dealing with overdue items among your own patrons the intra-Minerva patrons need notification as well. So there are good reasons to run your notices. At the least, run the email notices so that those patrons get notified.)

–If you do not want to bother with manually going in to run notices every day, please contact Alisia about setting up notices to run automatically.–

Run Bills (at least weekly)

A bill notice will be created at 20 days overdue.

(The reasons for running bill notices are like the overdues, but more pressing. If you do not already so, I strongly urge you to mail bills to those patrons who do not have email addresses—particularly if they are not from your library.)

Different libraries have different techniques for handling bills. This is a local decision and can be handled as you like, so long as they are done.

When there is a bill for another Minerva patron, create an invoice

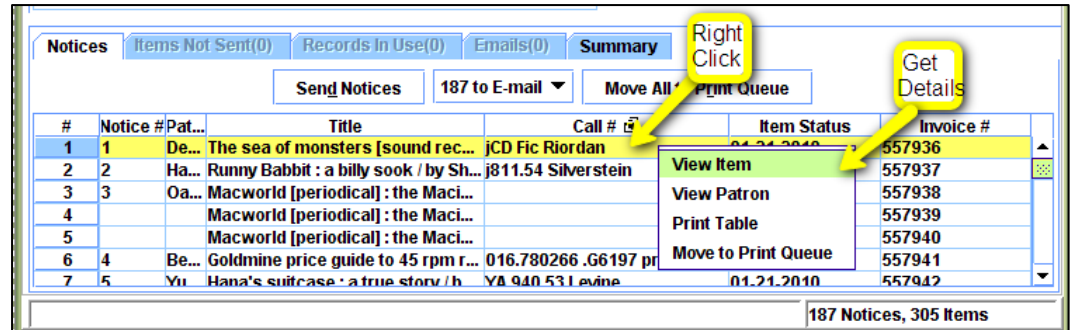
In addition to notifying the patron (via the bill) that they owe, the item owning library also sends an invoice to the borrowing patron's library for the value of the item.

The invoice template (available at <http://www.>) contains the following:

- | | |
|----------------------------|--------------------------|
| ✓ Patron's library | ✓ Item title |
| ✓ Patron's library address | ✓ Item location / call # |
| ✓ Patron's name | ✓ Item price |

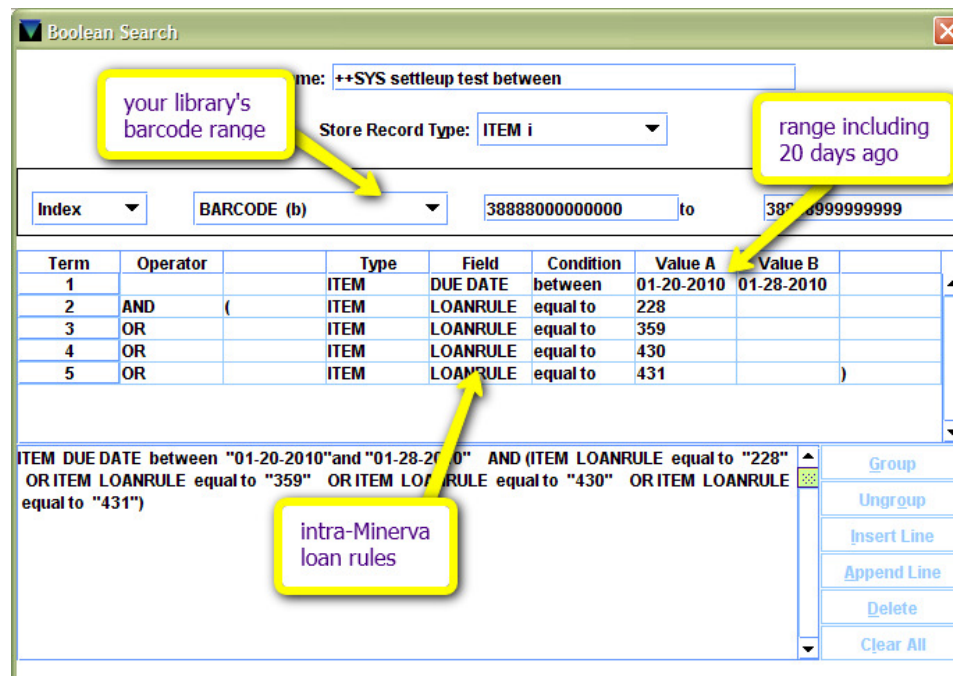
It doesn't matter how you get the form filled in, so long as it's done. Depending on how many billed items you're dealing with and how you usually do your bills, different strategies make sense.

- ✓ A) If you print all your bills, separate out non-local patrons and copy the relevant info into the invoice template.
- ✓ B) If you print to email, separate out non-local patrons and copy and paste the relevant info.
- ✓ C) If there are only a few items, right-click the prepared list of bills (before you send the notices) to view the item and patron records to see if they are other Minerva patrons and if so, to get the relevant info.



- ✓ D) If you email bills to patrons and there are too many bills to check by hand, here are 2 more options:
 - 1) Do **not** clear bills after sending. Run again and choose email printer. Move all notices to print queue, print to your email, follow (B) above.

- 2) Run a list where



As long as the relevant information is included, invoices can be filled in on the computer, typewritten or filled in by hand. They can be paper mailed or emailed. Whatever works. Please also be aware that most libraries require a W9 [link: <http://apps2.irs.gov/pub/irs-pdf/fw9.pdf>] from your library or town in order to cut you a check. If you want to use email, scan a signed copy of your W9 to send along with the invoice.

When you receive payment from a patron's library "collect" the money from their patron's fines

When the item owning library receives payment, *promptly* go to the patron record and collect money for the automated charge. This will eliminate the double fine for the patron and change the item status to paid. Then you can do whatever you like with the record.

Fines(\$40.00)		Check In (0)	Linked Patrons(0)	Bookings(0)	INN-Reach(0)
Check Out (0)		Checked-Out Items(1)			Holds(0)
Total:	\$40.00				
Amount selected:	\$20.00				
		Automatic charge: collected by item library			Charge
		Patron Notes			
All	Status	Title	Location	Amount	
<input type="checkbox"/>	Replacement	Gathering blue / Lois Lowry.	tplyf	\$20.00	
<input checked="" type="checkbox"/>	MANUAL	ILL PAID: Gathering Blue / Lois Lowry. due 1/5/10, paid...	tpl	\$20.00	
		Manual charge: Collected by patron library			

Borrowing Patron's Library (Your Patron)

Requesting, transit, and checkout are still exactly the same.

Check your patrons and pay your invoices (weekly)

45 days after the due date, the borrowing patron's library takes responsibility for paying for the lost item. The item can no longer be returned—it now needs to be paid for. Therefore, you need a way of seeing which items are still checked out to your patrons.

It doesn't matter how you do this, so long as you do. Here are 2 potential methods:

- ✓ Most straightforward, although least technical would be to keep a paper file of all invoices received. Then check this regularly (weekly) to see if there are any from 25 days before. Check the patron's record to see if the item is still overdue. If it's returned, shred the invoice. If it's still out, begin the process of paying the item owning library from the invoice.

or

- ✓ Run a list of your patrons who have billed items at other libraries [see screenshot]. If there are too many to easily tell which are old enough, limit by due date > 45 days ago. However, I don't think that there will be that many to sort through.

Place a manual charge on the patron's record to show what they owe to you

At the same time you start the payment process for the owning library, also place a manual charge on the patron's record.

1. In the Fines tab, click "Manual Charge"
2. Select ILL PAID: from the Predefined list
3. Enter the amount the patron owes for the item
4. Write in the Title / Author, Due date, paid date, and your initials
5. select your library location

Click OK

This is for the patron's library to track what they are owned by the patron.

When the patron pays for the item, remove the manual charge.

If the patron pays the charge, the patron's library marks the *manual* charge as paid.

All	Status	Title	Location	Amount
<input type="checkbox"/>	Replacement	Gathering blue / Lois Lowry.	tplyf	\$20.00
<input checked="" type="checkbox"/>	MANUAL	ILL PAID: Gathering Blue / Lois Lowry, due 1/5/10, paid...	tpl	\$20.00

Long in Transit

An item that has been in transit for more than 45 days is considered lost.

The library that placed the item in transit (last scanned) is responsible for payment of replacement cost to owning library. The owning library is responsible for billing the library that set their item into transit.

The middle of every month, the InfoNet staff will create a list for Minerva called **SYS Minerva Long in Transit [MONTH]**. Use this list to create your own list of items by creating a list like this:

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	starts with	tpl	

Check your shelves to make sure that the item has not found its way home. If found, check in.

If the item is not found, create an invoice for it from the long in transit invoice template [link]. Be aware that most libraries require a W9 [link: <http://apps2.irs.gov/pub/irs-pdf/fw9.pdf>] from your library or town in order to cut you a check. If you want to send invoices by email, scan a signed copy of your W9 to send along with the invoice.