

In Polaris, the library can charge patrons for overdue, lost, and damaged items, and for special services. Your library may also take deposits for library services, and later return or forfeit the deposits.

Access the account data for a patron record

Open the patron's record in the Patron Status workflow (F6→search for patron using find tool)

Click on the
Account button



Patron Status - 174422 - General - Polaris

Barcode: 2080000419118 Name: Gayle D. Boyd

Acct charges: \$53.05 Patron code: Staff

Acct credit: \$0.00 Statistical class: Bon Accord - Town

Items out: 12 Registered branch: Bon Accord Public Library

Total overdue: 10 Voice phone 1: 780-921-2222

Claims/Lost: 0/1 ID: [REDACTED]

Items held: 0 E-mail address: boy [REDACTED]

Status

Block Description	Amount
Patron has notes.	\$53.05
Patron owes money. Amount due : \$53.05.	
Patron has exceeded maximum fees permitted. Amount...	

Items out: 12
Items overdue: 0
Items long overdue: 10
Items on hold: 0
Claims (current): 0
Claims (total): 0
Lost items: 1
Notes: Yes

Add Block... Delete Block...

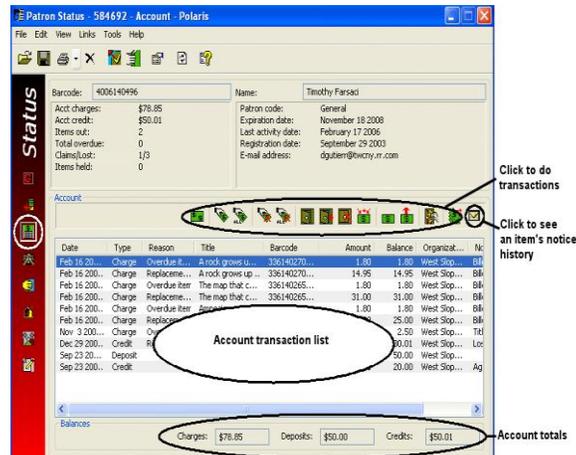
Notice

Title	Type	Date	Method	Amount
A great and terrible ...	2nd Overdue	Oct 31 2008 6:22AM	Email	\$0.00
Blindness	2nd Overdue	Oct 31 2008 6:22AM	Email	\$0.00
Libraries designed fo...	2nd Overdue	Oct 31 2008 6:22AM	Email	\$0.00
My smart puppy : fu...	2nd Overdue	Oct 31 2008 6:22AM	Email	\$0.00
One year to an orga...	2nd Overdue	Oct 31 2008 6:22AM	Email	\$0.00

For Help, press F1

Patron accounting features

Note: Not all log-ins will have the same functionality in Polaris (e.g. only Library Managers will have the ability to waive fines).

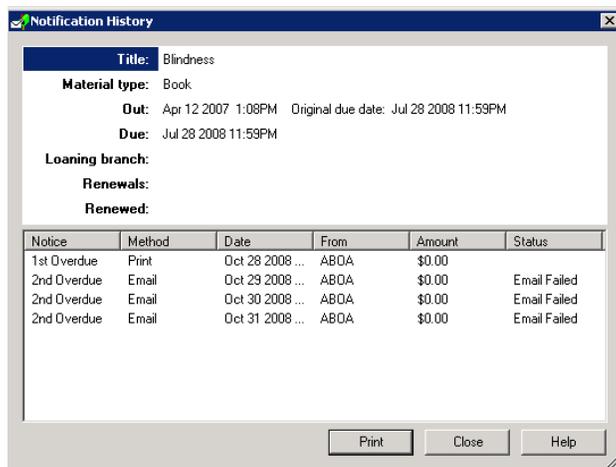


- Each line item in the Account Transaction list includes the transaction's date, type, and amount, as well as the current balance for the transaction.
- A line item may also contain a reason for the transaction, an associated title, a barcode, and notes.
- There are separate line items for replacement and overdue charges.
- By clicking the appropriate button above the Account Transaction list, you can do financial transactions and access a summary of completed transactions.
- At the bottom of the Account view, the Charges, Deposits, and Credits boxes track total amounts on the patron's account, and increment and decrement according to the account transactions.

Note: As you work with the record, you can refresh the header information in the workform by pressing F5 or click  on the toolbar.

Notice History

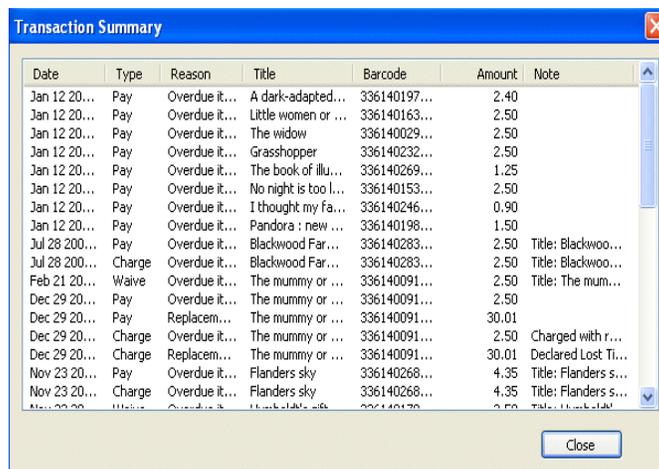
- You can see a list of notices that have been sent for an item. Select the item in the Account Transaction list and click  (or press ALT+N). The Notice History dialog box opens. You can print the list of notices.



Viewing completed account transactions

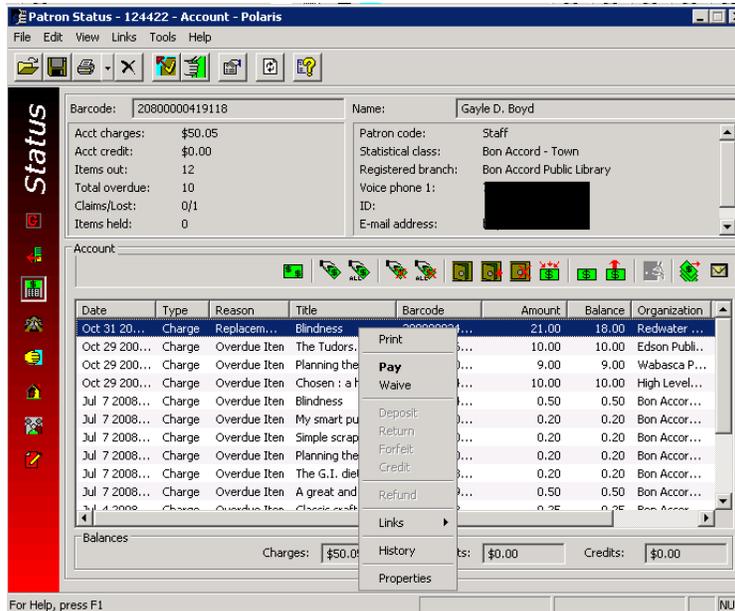
Once you have reconciled an item, you can see a summary of all past transactions, by clicking on 

This will display the Transaction Summary box, where all past completed monetary transactions are archived for a predetermined number of days.



Display a transaction's history

You can view the account activity for any selected line by right-clicking on the item and selecting History



Note: Right-clicking a line item and selecting Properties will always give you more information about the transaction.

Processing Charges and Payments

Polaris 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.

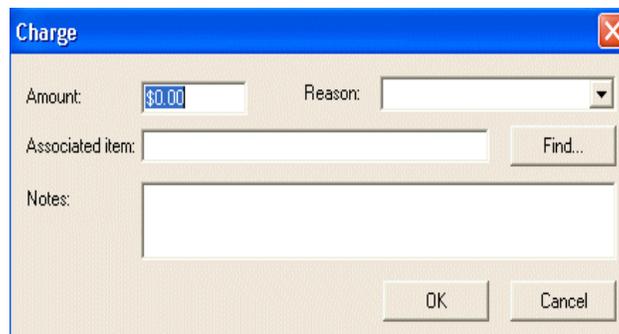
With the appropriate permissions, you can reconcile current charges in a patron account by paying them or waiving them, you can issue refunds or credits on completed transactions, and you can manually create a credit in a patron's account.

Creating a Manual Charge

You typically associate a charge with a predefined reason (such as for a damaged item, Internet access, or a special service). You can assign a charge through the Patron Status workform- Account view.



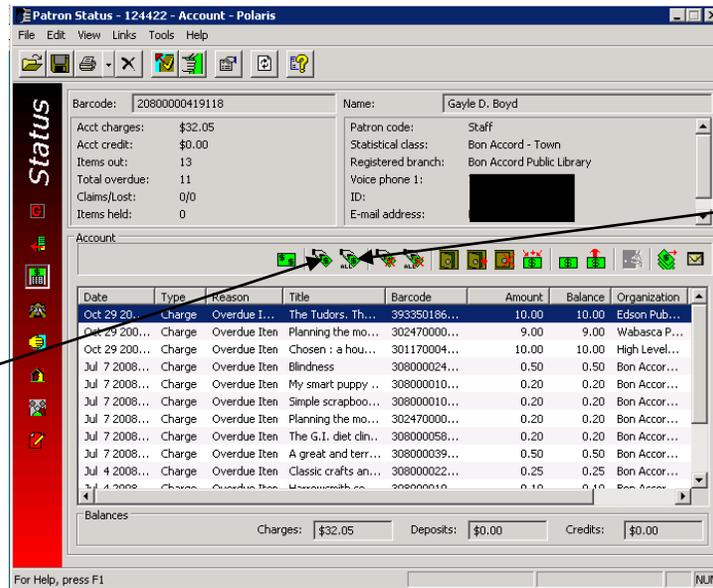
The Charge dialog box appears.



- Type the amount you want to charge in the Amount box.
- Select a reason for the charge in the Reason box.
- 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 using the Find Tool)
- If you want to add a note, type the information in the Notes box.
- Click OK

Pay charges from the Account view

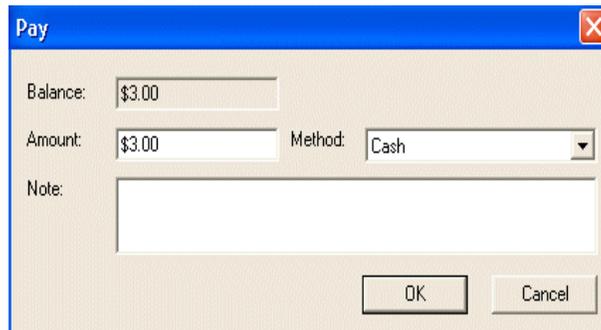
You can pay a single charge, selected charges, or all charges in a single transaction. You can also do a partial payment, or accept an overpayment.



Click on the Pay All Button (CTRL+L) to resolve all charges at once

Select an item from the list and click the Pay Button (CTRL+Y)

The Pay dialog box appears.



- If you want to partially pay the selected charge or charges, type the new amount in the Amount box.
- 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.

Waiving Charges from the Account view

Depending on your permissions level, you can waive a single charge, selected charges, or all charges in a single transaction. You can also waive part of a charge, or apply one waive amount to each of several charges.

Select an item from the list and click the Waive Button (CTRL+W)

Click the Waive All Button (CTRL+V) to waive all charges at once

Date	Type	Reason	Title	Barcode	Amount	Balance	Organization
Oct 29 2008...	Charge	Overdue I...	The Tudors. Th...	393350186...	10.00	10.00	Edson Pub...
Oct 29 2008...	Charge	Overdue Item	Planning the mo...	302470000...	9.00	9.00	Wabasca P...
Oct 29 2008...	Charge	Overdue Item	Chosen : a hou...	301170004...	10.00	10.00	High Level...
Jul 7 2008...	Charge	Overdue Item	Blindness	308000024...	0.50	0.50	Bon Accor...
Jul 7 2008...	Charge	Overdue Item	My smart puppy ..	308000010...	0.20	0.20	Bon Accor...
Jul 7 2008...	Charge	Overdue Item	Simple scrapboo...	308000010...	0.20	0.20	Bon Accor...
Jul 7 2008...	Charge	Overdue Item	Planning the mo...	302470000...	0.20	0.20	Bon Accor...
Jul 7 2008...	Charge	Overdue Item	The G.I. diet clin...	308000058...	0.20	0.20	Bon Accor...
Jul 7 2008...	Charge	Overdue Item	A great and terr...	308000039...	0.50	0.50	Bon Accor...
Jul 4 2008...	Charge	Overdue Item	Classic crafts an...	308000022...	0.25	0.25	Bon Accor...
Jul 4 2008...	Charge	Overdue Item	Massachusetts...	308000010...	0.10	0.10	Bon Accor...

The Waive dialog box appears.

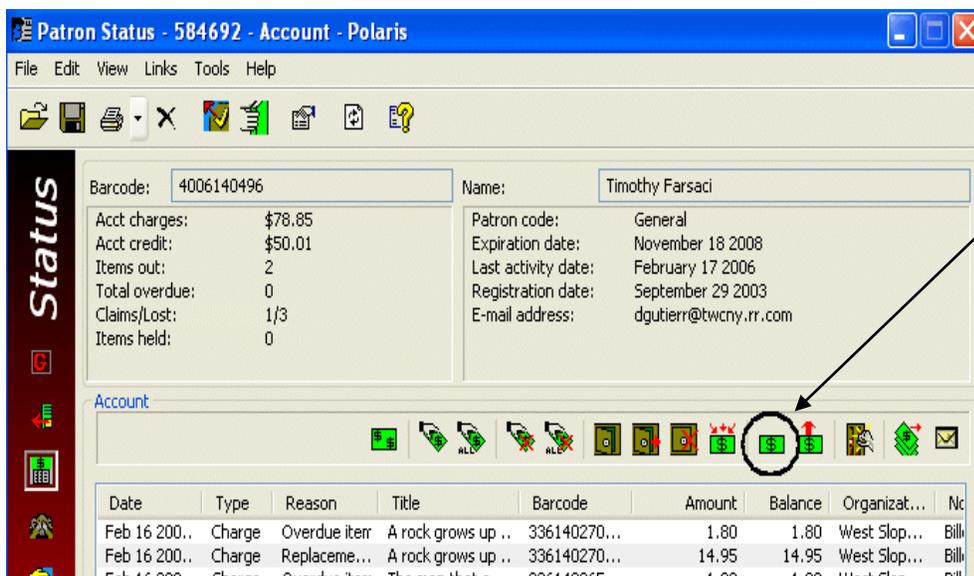
- If you want to partially waive the selected charge or charges, type the new amount in the Amount box.
- If you are making a partial waive on a single charge, the transaction will be recorded as a partial waive on the charge, and the Account Transaction list will show a balance for the charge.

Patron Accounting

- 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.
- If you want to add a note to the transaction, type the information in the Note box.
- If you have specified a distributed waive, the note appears with each transaction.

Create a credit manually

From the Account view, you can create a credit on the patron's account that is unrelated to any specific charge or overpayment.



The Create Credit dialog box appears.

Create Credit (Ctrl+B)

Amount: Method:

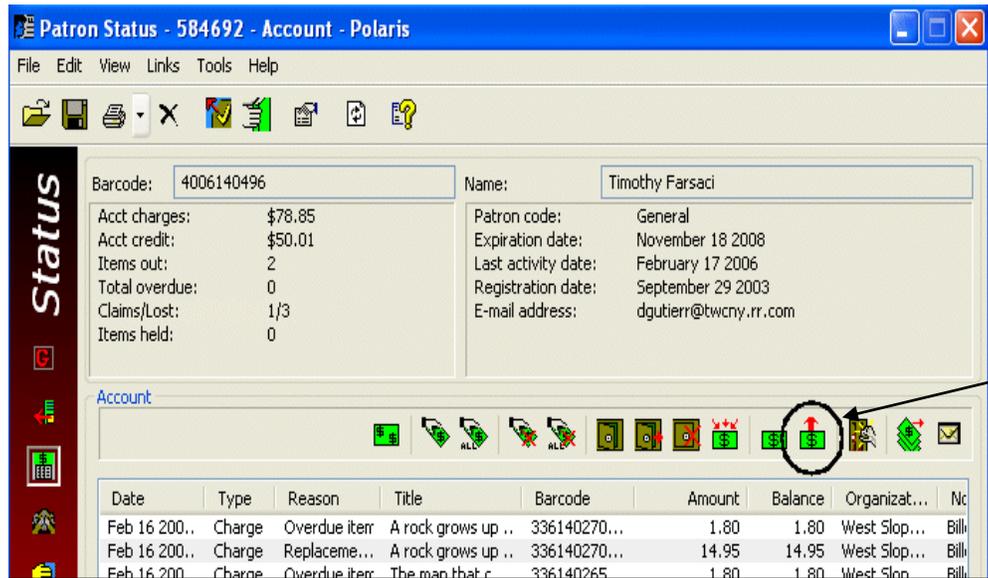
Note:

OK Cancel

- Type the credit amount in the Amount box.
- Select a payment method for the credit in the Method box.
- If you want to add a note to the transaction, type the information in the Note box.
- Click OK on the dialog box.

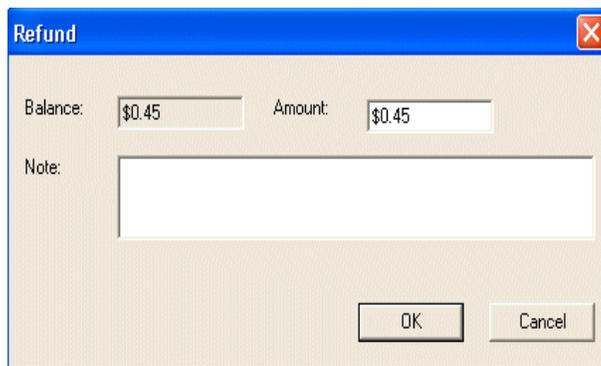
Refund a credit amount

From the Account view, you can partially or fully refund credit transactions on the patron's account.



Select one or more transactions to credit & click the Refund Credit Button (CTRL+G)

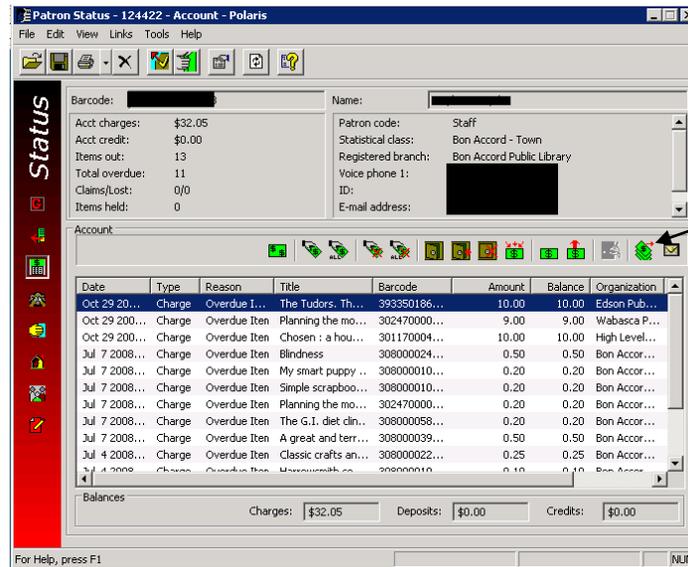
The Refund Credit dialog box appears.



- Type the amount to refund in the Amount box.
- If you selected multiple 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. Any remaining amount is applied to the next oldest credit in the Account Transaction list as a partial refund.
- If you want to add a note to the transaction, type the information in the Note box.
- Click OK on the dialog box.

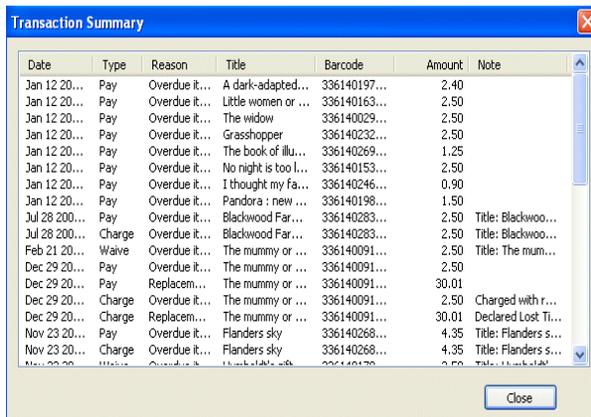
Refund or credit completed payment transactions

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.



Click on the Transaction Summary Button

All reconciled transactions appear.



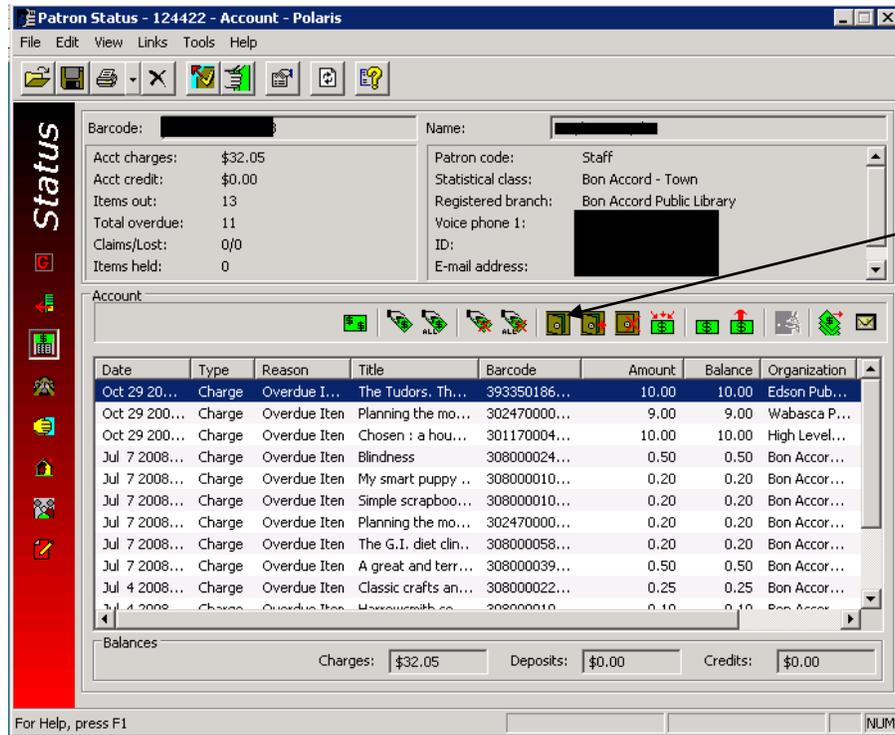
Select the appropriate payment or payments in the list.

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

Make a deposit on a Patron Account

Your library may require a deposit when a patron uses a valuable item, rents a room, or uses another library service. When the patron is finished with the service or item, you return all or part of the deposit. This is done from the Patron Status workflow.



The Deposit dialog box appears.

- Type the amount to deposit in the Amount box.
- Select a payment method for the deposit in the Method box.
- If you want to add a note to the transaction, type the information in the Note box.
- Click OK on the dialog box.

Return, forfeit, or credit deposits

You reconcile deposits by return, forfeit, or credit transactions on one or more deposit line items. You can also do a partial return, forfeit, or credit. This can be done from the Patron Status workflow.

The screenshot shows the 'Patron Status - 124422 - Account - Polaris' window. The interface includes a menu bar (File, Edit, View, Links, Tools, Help), a toolbar, and a main area with a 'Status' sidebar on the left. The main area displays account information (Barcode, Name, Patron code, Statistical class, Registered branch, Voice phone 1, ID, E-mail address) and a table of transactions. The table has columns for Date, Type, Reason, Title, Barcode, Amount, Balance, and Organization. Below the table is a 'Balances' section with fields for Charges (\$32.05), Deposits (\$0.00), and Credits (\$0.00). A callout box on the right contains the following text:

Select a deposit or credit transaction and click on one of the following buttons:

- Return Deposit (CTRL+R)
- Forfeit Deposit (CTRL+F)
- Refund Credit (CTRL+G)

- If you want to partially return, forfeit, or credit the deposit, type the new amount in the Amount box.
- If you want to add a note to the transaction, type the information in the Note box.
- Click OK on the dialog box.

One final cool Polaris tip!

When accepting patron payments, if you enter the exact amount given to you in the Pay Dialogue Box and click OK, a pop up will tell you the amount of change owed to the patron.