Lost Items – Bills and Refunds

Lost items– Mark an item lost when it is checked out to someone and the patron tells you the item is lost or if it is long overdue (more than 2 years). Items are also marked Lost when a patron leaves the school.

Missing items - Items which are not checked out to a patron but cannot be found should be marked missing

Marking items lost

1. Retrieve patron record and click *Items Out*
2. Select the item(s) by clicking on the row
3. Click *Actions* > *Mark Lost (by patron)*
4. Lost items now display in the *Other/ Special Circulations* pane of the Items Out display

Marking an item 'lost' will automatically apply a charge to the patron's account. If the item is returned after the patron has paid for it, the patron's account will be credited (see *If a Lost-and-Paid-for item is returned* below)

Dealing with bills for lost items

1. Click on *Bills* in the patron record
2. Click on the row to select the title you want to handle the bill for
3. Click in the *Annotate Payment* check box to add notes about the payment
4. Click on the arrow in the *Payment type* drop-down menu and follow the correct instructions to **forgive** or **pay** for the bill

Forgiving the bill

a) Choose *Forgive* in the *payment type* drop-down menu
b) Enter the amount of the bill in the 'payment received' field
c) Click *Apply Payment*
d) Enter notes in the pop-up window (*ie* Bill forgiven by principal)

Paying the bill

a) Choose *cash* or *cheque* from the payment drop-down menu.
For all other types of payment – textbook deposit, debit, credit card – choose *cash* and then enter specific payment information in the notes window that opens after you click *Apply payment*.
Important: Do not choose *credit card* from the payment options or enter any credit card information in Evergreen
b) Enter the bill amount in the *Payment Received* box and click *Apply Payment*
c) Enter notes in the pop-up window (*ie* textbook deposit applied, Visa payment to accountant)

Annotating Payments

Please include detailed notes so we can review the history if the lost item is returned.

See *Viewing bill history* below for information about how to see these notes

Printing receipts

If you want to print receipts for payments, click *Receipt Options* in the bottom right corner.

Receipt upon payment – print automatically after clicking Apply Payment

Printer Prompt – choose each time whether you print a receipt

If a ‘Lost and paid for item’ is returned

1. A *copy_status_lost_and_paid* alert will pop up when you check in a lost items that has been paid for
    - The patron’s account has been credited for the amount of the lost item, **regardless of whether it was paid for by cash or by forgiveness**
2. Click *Yes* to check the item in
3. A red hyperlink will appear on the check in page with the item barcode and the amount of the bill.
4. Click on the hyperlink to go to the patron’s *Bills* page.

Viewing bill history – check to see how the item was paid for

1. Click the *Bills* tab in the patron record
2. Make sure the ‘Note’ column and the ‘Last Payment Type’ columns are displayed
3. If the payment type is ‘cash_payment’ or ‘cheque_payment’, then follow the instructions for refunding the patron
4. If the payment type is ‘forgive_payment’, then follow instructions for ‘Adjusting the bill to zero’

Refunding the patron for a cash payment

1. If the patron is not present, you may wish to add an alert to their account so you remember to reimburse them at a later time (see ‘Adding alert’ notes below)
2. In the patron’s Bills section, click on the row for the title you want to issue a refund for
3. Click *Actions* > *Refund*
4. Click *Yes* in the Refund Excess Payment window. A negative amount will appear in the Payment Pending column
5. Click *Apply Payment*
6. The lost and paid for item will disappear from the Bills tab
7. Remember to reimburse the student

Adjusting the bill to zero for a forgiven payment

1. Since money was not collected for ‘forgiven’ items, we don’t actually want to issue a refund to the student
2. Right-click on the title and select ‘Adjust to zero’
3. Click ‘Yes’ to confirm
4. Click ‘Refresh’ to see the patron’s cleared account

Finding out who has credits on their accounts

1. *Click on Administration > Local Administration > Patrons with Negative Balances*
2. Choose the correct school from the drop-down menu
3. Right-click on a patron name and then click ‘Retrieve patron’ to open their account

Adding an alert to a patron's account to reimburse at a later time

Put an alert on a patron account if they are not there to reimburse in the moment. The alert will display across the whole patron page and you will need to click *Check Out* to override

1. Click *Messages* in the top right corner of the patron record
2. Click *Apply Standing Penalty/ Message*
3. Select *Alert*.
4. Enter the reimbursement information, (*ie* Refund Chris for lost and paid for item)
5. Add your initials and click *OK*

Removing alerts and notes

1. Click *Messages* in the patron record
2. Click the alert or note you want to remove
3. Right-click and then click *Remove penalty/ message*