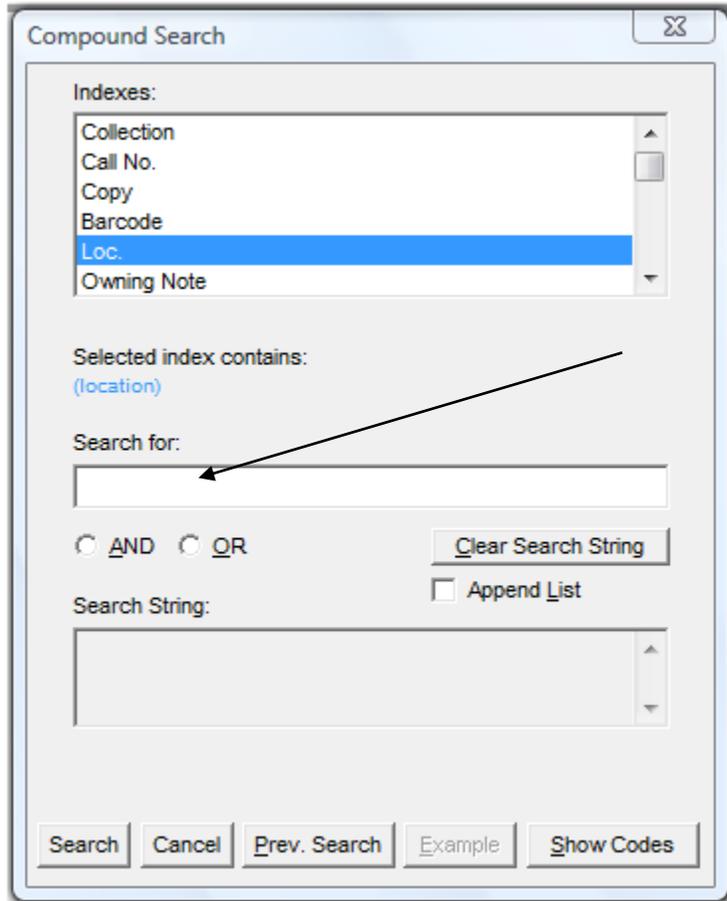# Step by Step – Billing Patrons and Libraries for Lost Books in Horizon

Part One: Find out which books are lost, and who lost them.

1. Double click on Item Report, found on the left menu in Horizon under Administration.
2. In the compound search window, choose Loc for Location and type your 3-letter library code in the blank:


3. Click the circle next to AND, then choose Item Status in the top section.
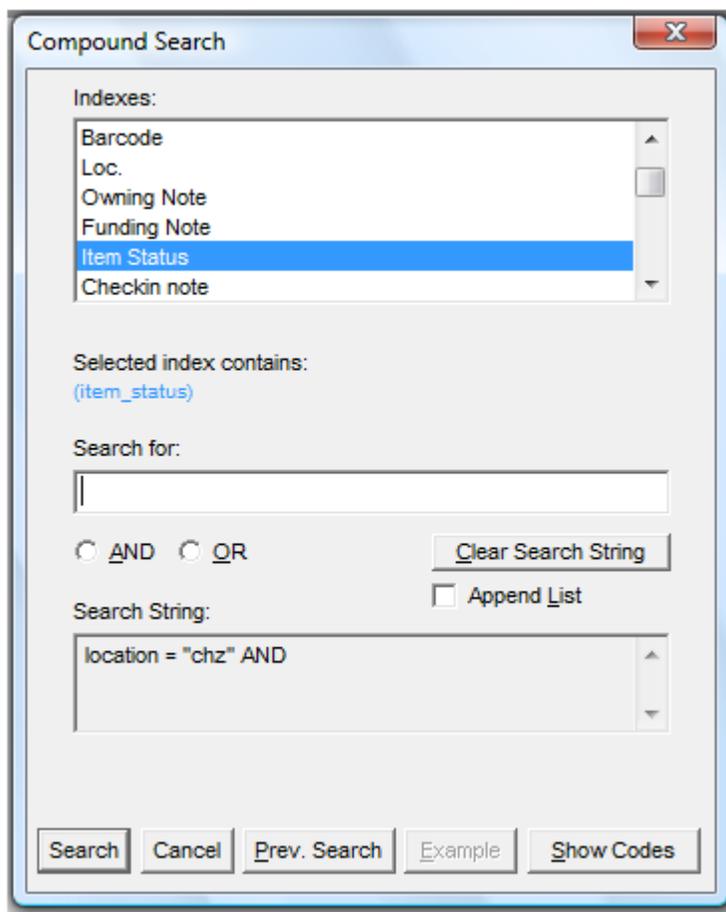
4. Type l for Lost, and finally click on the Search button at the bottom.
5. A list of lost items at your location appears:

| Collection/Author/Call No.		Barcode	Title	Item Stat
1. cze	E BAR	38787330036110	Dinosaurs, dinosaurs /	Lost
Barton, Byron.				
2. czf	F COU	38787500166549	Point blank : an FBI thriller /	Lost
Coulter, Catherine.				
3. czjf	JF NAY	38787500021157	Shiloh /	Lost
Naylor, Phyllis Reynolds.				
4. czjbi	J920 ARM	38787330005701	Famous American military leaders of world	Lost
Army Times Publishing Company.				
5. czjp	JF818 EIS	38787330036086	101 bug jokes /	Lost
Eisenberg, Lisa.				
6. czjacb	BOOK/AUDIO	38787330022789	Horton hears a Who!	Lost
Seuss, Dr.				
7. cze	CZE	38787330017300	The little train /	Lost
Lenski, Lois, 1893-1974.				
8. cze	E SEU	38787330011238	There's a wocket in my pocket!	Lost
Seuss, Dr.				

6. Click on the Display button at the bottom of the window to highlight a few different columns to display:
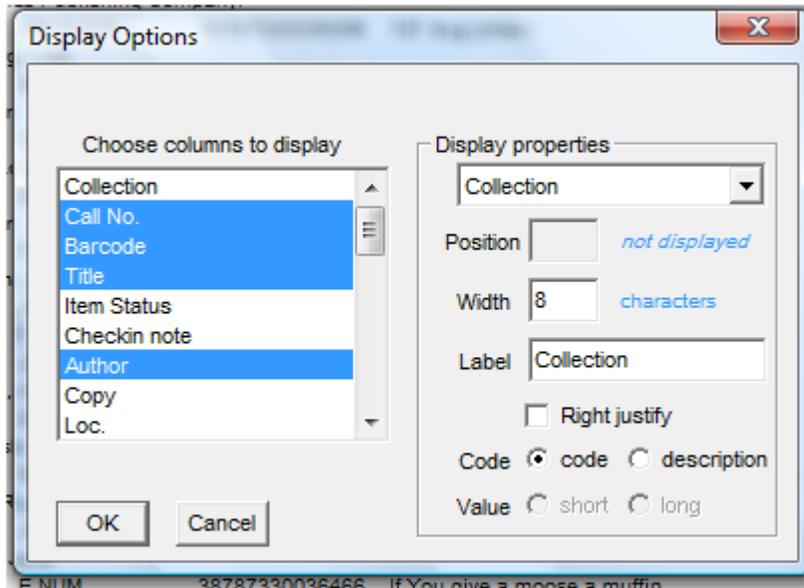
7. Click to deselect Collection, Item Status and Checkin Note, and click to select Due Date, Name, and Borrower Location, then click OK.
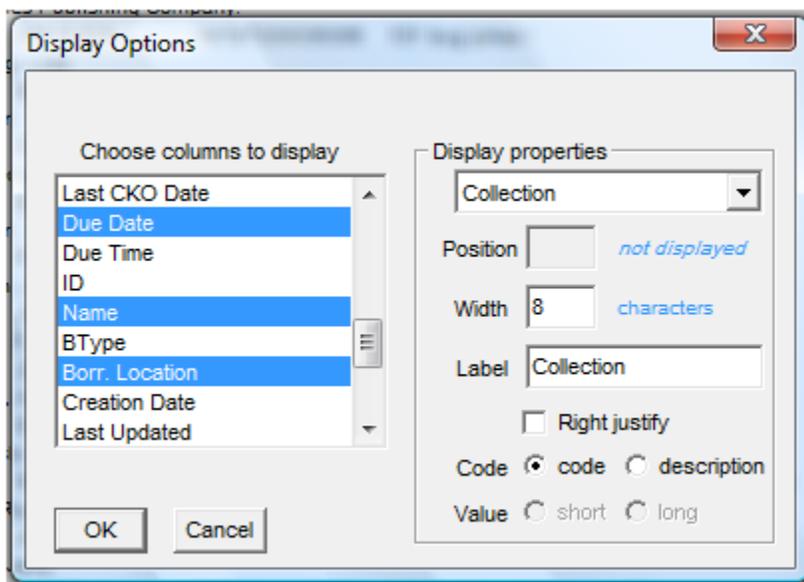
8. Click on Sort, then choose Borrower Location and Name, and click OK:
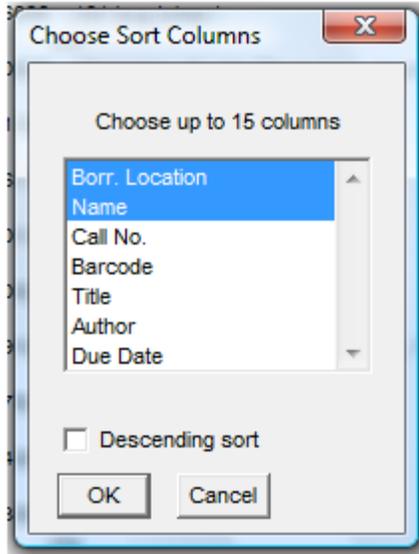
9. You will get a list of Lost books with some being lost by your own patrons, and probably some by other libraries' patrons. You can print out the list with the File/Print command, or highlight all records and use the File/Export Records command to save it with a .txt or .xls extension.

Part Two: Attempt to recover book or payment

Now that you know which items are lost, and who lost them, you can communicate with those people or libraries to get the items returned or paid for. You may want to bill your patrons, or bill the library that the patron belongs to. You can use a bill such as the ones available from the Microsoft Office website.

You may use the default cost from Horizon, or use a different replacement cost. You might also want to add a processing fee.

Part Three: What to do next

Several things may happen as a result of Part Two. The bold face phrases are described in greater detail below the list.

1. Your patron pays for your own item. You should **mark the item paid** in Horizon, and **withdraw the item**.

2. Your patron wants to pay for another library's item. Don't take payment or mark it paid. Communicate with the other library. They may wish to charge more or less than the amount listed in Horizon. The other library should be the one to mark it paid, since the payment ends up in their account.

3. The other library pays for the item. You should **mark the item paid** in Horizon, then **withdraw the item**.

4. Your patron or the library claims they returned the item (or never had it).   If you accept the explanation, you should **mark the item claimed returned**.   If not, you can try to insist on payment.   Then follow the steps in #1, #3 or #5.

5. Your patron has left the area or is unable to pay for the item. You should **waive the item** and, if you still want the patron to be responsible for the item, **place a manual fee block** for the charges on the patron's record, then **withdraw the item**. You might consider changing the patron to a delinquent borrower type so they cannot borrow additional items.

6. Your library is the one billed, and pays for the item. You should pay the other library for the item, and if it was lost by one of your patrons you should **waive the charges** and then **place a manual fee block** on the patron. Then you can **bill the patron**, and the owner can withdraw the item. When and if the patron pays, you can then **mark the fee block paid**.

How to Mark an Item Paid:

1. Only mark items paid if the money will stay with your library. The ending point of the money is where it should be marked paid.

2. Call up the patron in the CKO window. Do not close the blocks window.

3. Highlight the item which will be paid for.

4. If you need to change the amount that will be charged, use the Change Amt button at the bottom of the window to indicate the correct amount. Enter a reason if desired, but always enter your initials, and click OK.

5. Use the Blocks Menu, and click on Payment, or click on the Payment button at the bottom of the window.

6. If the full amount is being paid, simply click on OK. If a partial amount is being paid, enter it. Optionally enter any comment desired, then click OK.

How to Withdraw an Item:

1. Find the item with F2, by barcode if possible.

2. Send it to the copy/item list with F10.

3. Edit the record, entering 'w' in the Item Status field. Save.

4. If you receive a message indicating that you need to use circulation to change the item status, this means you must check in, pay or waive the item first. Claimed Returned items are a bit different. You can use File/Delete Record, and it will ask you if you want to charge the patron for the lost item.

How to Mark an Item Claimed Returned or Lost:

1. Call up the patron in the CKO window.

2. If blocks appear, click on CKO to proceed to the main CKO window.

3. Click on All Items Out at the bottom of the window.

4. Highlight the item or items to mark Claimed Returned or Lost.

5. Use the CKO Menu and click on Claimed Returned or Lost.

How to Waive Charges:

1. Call up the patron in the CKO window. Do not close the blocks window. If you inadvertently close it, bring it back by clicking the Blocks button at the bottom of the CKO window.

2. Highlight the item which will be waived.

3. If you need to change the amount of the fee first, use the Change Amt button at the bottom of the window to indicate the correct amount. Enter a reason if desired, but always enter your initials, and click OK.

4. Use the Blocks Menu, and click on Waiver.

5. If the full amount is being waived, simply click on OK. If a partial amount is being waived, enter it. Optionally enter any comment desired, then click OK.

How to Place a Manual Fee Block

1. Call up the patron in the CKO window.

2. Use the Blocks Menu and choose Add a Fee.

3. For the type of fee, choose Fee.

4. Enter an amount and a descriptive comment that includes the title of the item that was lost. Always initial your comment so that if anyone has questions they can ask you about it.

Notes:

VERY IMPORTANT: *Only waive or mark items paid for your own patrons. Only withdraw or delete your own items! Communicate with other libraries!*

When items are waived or paid, they change to a status of Missing. Good library practice would be to periodically withdraw missing items that have not changed status for 6 months or a year. This can be done in a batch process with Item Group Editor.