

Mark Item Lost Wizard, Assumed Lost Report, and Long Overdue Report

What are the differences?

Mark Item Lost Wizard: You might use this wizard if a patron comes into the library and reports an item being lost, and you want to bill the patron for the item and shadow the item from the catalog. This wizard changes the current location of the item to LOST-CLAIM without removing the item from the patron's account.

Assumed Lost Report: This reports automatically bills a patron after an item has been overdue a certain number of days, shadows the item from the catalog, and changes the current location of the item to LOST-ASSUM. The item is not removed from the patron's account. This report also has an option to send bill notices to patrons. This report is used when a library expects the patron to return or pay for the item.

Long Overdue Report: This report is used if a library does not expect an overdue item to be returned and wants to remove the item from the catalog. This report breaks the connection between the item and the bill, so the item can be removed from the catalog. An item cannot be removed from the catalog if there is a bill associated with it.

This report discharges the item from the patron's account, changes the current location of the item, shadows the item in the catalog, removes any lost bills for the item (removes the link between the bill and the item), and creates a note with brief title/copy information in the LOSTITEM extended information field in the patron's account. After you run the report, this note will be the only connection between the patron and the lost item. You also have the option to bill the patron for the price of the item, charge a processing fee, calculate and add any accrued overdue fines on the item, and bar the user (change the patron's status to BARRED). However, you have to run the Bill Notice report if you want to send a notice to the patron. **If you are interested in using this report, please contact the WYLD Office at support@wyldnetwork.org. We set up this report for you.**

What does the wizard/report change the current location to?

Mark Item Lost Wizard: LOST-CLAIM

Assumed Lost Report: LOST-ASSUM

Long Overdue Report: Depends on what you set up in the report. Most libraries change the current location to DISCARD, so they can permanently remove these items through another report. Another option is to change the current location to LONGOVRDUE, which results in the item being charged to a LOST user. However, if you choose this location, there are additional steps that must be taken before you can remove these items from the catalog.

Is the item discharged from the patron's account after the wizard is used or the report is finished?

Mark Item Lost Wizard: No, the item remains on the patron's account until the lost item bill is paid, a staff member waives the bill, or the item is discharged.

Assumed Lost Report: No, the item remains on the patron's account until the lost item bill is paid, a staff member waives the bill, or the item is discharged.

Long Overdue Report: Yes, furthermore, the link between the item and the bill is removed. Instead, the report makes a note in the patron's extended information LOSTITEM field that contains the title, author, call number, due date of the item, copy number, and item ID.

Lost item: The good girl / Mary Kubica, XX(2001418.4), copy:1, ID:2001418-4001, due:20151101



Is the item shadowed in the catalog?

Mark Item Lost Wizard: Yes

Assumed Lost Report: Yes

Long Overdue Report: Yes

What happens if the patron returns the item *before* he/she pays for the item?

Mark Item Lost Wizard: When the item is discharged, a warning pop-up appears, "Warning!!! This item was reported as lost or assumed to be lost". If you click "OK", the item is removed from the patron's account, the lost bill goes from "unpaid" to "paid" on the user's account, and the LOST-CLAIM status is cleared. (The item's current location will change back to the home location). If the item has a processing fee, the fee may or may not be automatically removed depending on your library's policies in WorkFlows (Default Price policy).

Assumed Lost Report: When the item is discharged, a warning pop-up appears, "Warning!!! This item was reported as lost or assumed to be lost". If you click "OK", the item is removed from the patron's account, the lost bill goes from "unpaid" to "paid" on the user's account, and the LOST-ASSUM status is cleared. (The item's current location will change back to the home location). If the item has a processing fee, the fee may or may not be automatically removed depending on your library's policies (Default Price policy).

Long Overdue Report: The link between the item and the patron is removed; therefore, you will receive an "Item not charged" message. The item is ready to recirculate. However, the item's current location is set to whatever you set up in the report (DISCARD, LONGOVRDUE). Check the item's current location and home location and modify if necessary before checking out the item to the patron. For example, you can discharge the item to change the item's current location back to its home location. Bills are not automatically forgiven. You must manually remove the bill from the patron's account.

What happens if the patron returns the item *after* he/she paid for the item?

Mark Item Lost Wizard: When the item is discharged, a warning pop-up appears, "Warning!!! This item was reported as lost or assumed to be lost". If you click "OK", the item's LOST-CLAIM status is

cleared. If the item was paid directly by the patron, you must manually issue a refund. If the bill was paid for automatically using the user's credit account, whether or not the bill is automatically refunded depends on your library policies in WorkFlows (Credit Rule, Credit Reason, and Default Price policies) and the properties of the Discharging wizard.

Assumed Lost Report: When the item is discharged, a warning pop-up appears, "Warning!!! This item was reported as lost or assumed to be lost". If you click "OK", the item's LOST-ASSUM status is cleared. If the item was paid directly by the patron, you must manually issue a refund. If the bill was paid for automatically using the user's credit account, whether or not the bill is automatically refunded depends on your library policies in WorkFlows (Credit Rule, Credit Reason, and Default Price policies) and the properties of the Discharging wizard.

Long Overdue Report: The link between the item and the patron is removed; therefore, you will receive an "Item not charged" message. The item is ready to recirculate. However, the item's current location is set to whatever you set up in the report (DISCARD, LONGOVRDUE). Check the item's current location and home location and modify if necessary before checking out the item to the patron. For example, you can discharge the item to change the item's current location back to its home location. Bills are not automatically forgiven. You must manually remove the bill from the patron's account.

Is there an option to bill the patron?

Mark Item Lost Wizard: Yes

Assumed Lost Report: Yes

Long Overdue Report: Yes, but there is no connection between the bill and the item. The bill reason for the item is LONGOVRDUE and the bill reason for the processing fee is PROCESSLOD.

Is there an option to send a bill notice?

Mark Item Lost Wizard: A notice is not automatically sent after you mark an item as lost. You must run the Bill Notice report in order to send a notice to the patron.

Assumed Lost Report: Yes

Long Overdue Report: No, you must run a bill notice report. However, the bill notice will not show specific title information. See example below:

MARC TESTER STRATTON

Dear MARC TESTER STRATTON,
"FIRST BILL"

We are taking the liberty of calling your attention to the fact that you owe the Library some money for the following bill. Please pay this bill at your earliest convenience. Thank you.

1	date billed:1/3/2003	bill reason:PROCESSLOD	amount due:	\$5.00
2	Solaris 8 administrator's guide / Paul Watters. Watters, Paul A.			
3	date billed:1/3/2003	bill reason:OVERDUE	amount due:	\$1.10
4	Solaris 8 administrator's guide / Paul Watters. Watters, Paul A.			
5	date billed:1/3/2003	bill reason:OVERDUE	amount due:	\$1.10
6	date billed:1/3/2003	bill reason:LONGOVRDUE	amount due:	\$20.00
7	date billed:1/3/2003	bill reason:LONGOVRDUE	amount due:	\$20.00
8	date billed:1/3/2003	bill reason:PROCESSLOD	amount due:	\$5.00

=====

TOTAL FINES/FEES AND UNPAID BILLS: \$50.20

How do I issue a refund for lost items that have been paid for and returned?

- If your library uses patron credit accounts, your library may have a policy that automatically issues a refund to a patron's account when the item is discharged. If not, the WYLD office can set up a policy that allows refunds to be issued automatically after the item is checked in.
- If refunds are not issued automatically, you have two options to manually issue a refund:
 1. If your library uses patron credit accounts, use the **Manual Refund** helper in the **Credit User Accounts** wizard. You may have to change your properties for this wizard to see the helper.
 2. If your library does not use credit accounts, issue the refund according to your library's procedures. To determine the refund amount, display the user's information using the **Display User** wizard. Click on the **Bill** tab. To see paid bills, make sure "Paid" is selected in the "Display Options" section on the bottom of the window:

Display options

Library: Bills:

Please contact WYLD support (support@wyldnetwork.org) with any questions and for help setting the Assumed Lost report, Long Overdue report, or Bill Notice report.

For more information, please see these technotes:

[Using the Assumed Lost Report to Generate a Final Notice](#)

[Life Cycle of an Item](#)