

Overdue and Billing Notices: Posting to the Database

Overview

“Posting to the database” refers to running your **Overdue** and **Billing Notices** in Polaris. This process is important because posting automatically updates item and patron records to indicate that the patron has been made aware that they have **overdue items** or items that have been **converted to lost** (if the item is still overdue after 35 days).

Also, it is important because posting to the database is a way to let libraries know what is going on with their items. If the item that is overdue for your patron is from a library other than your own, posting will allow the owning library to see in the item record that notifications have been sent or if the item has been set to lost, since TRAC policy does not allow them to contact your patron.

Posting to the database is a two- step process:

1. First is to run the **Overdues Full Page Mailer**, say **Yes** to posting, then **notify your patrons** that they have items that are either one or two weeks overdue.
2. Second is to run the **Billing Full Page Mailer**, say **Yes** to posting, then **mail the billing notice to your patron** so that they know they have an item that has been converted to lost and charges have been applied to their account.

NOTE: You should be Posting to the Database for your Overdues and Billing Notices once a week.

1. Overdue Notices

If a patron has their notification option set to email, text or telephone (Telephony must be enabled), Polaris automatically sends out notifications to the patrons to let them know they have items overdue.

However, if the patron’s **Notification Option** is set to **Mailing Address** (or telephone without Telephony enabled), Polaris has no way of contacting the patron to let them know that they have an item overdue. This is where you come in, by posting to the database and telling Polaris that notifications will be sent.

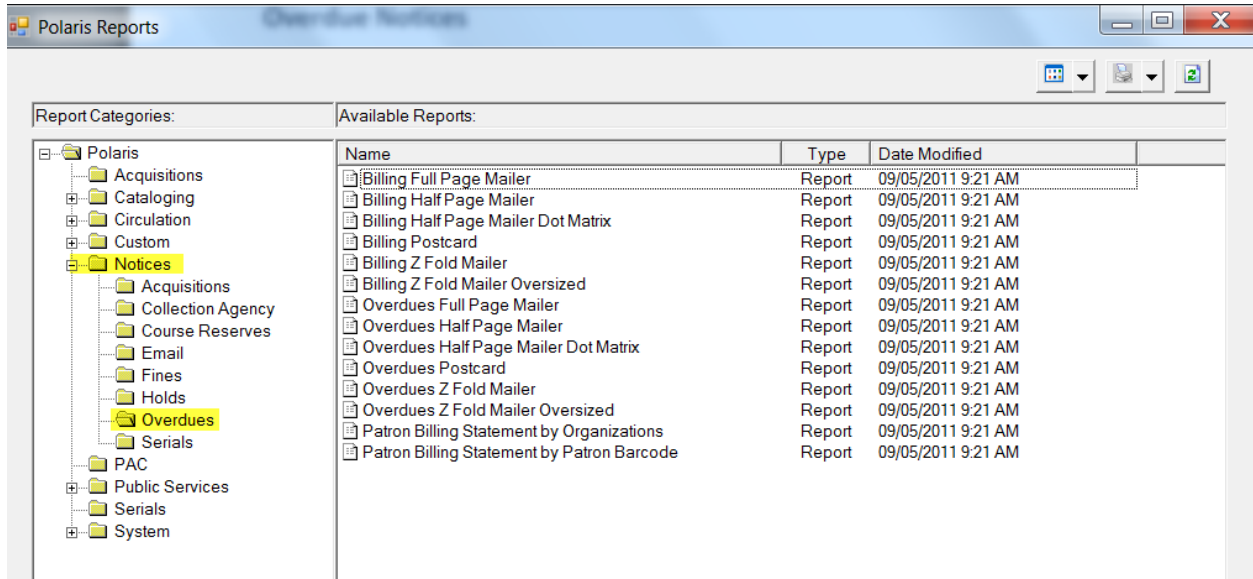
For Polaris to work properly, it must have record of two notifications being generated:

- The **1st Notice** is generated when the item is **seven days** past the due date.
- The **2nd Notice** is generated when the item is **fourteen days** past the due date.

Why does Polaris need to know that a patron has been contacted about an overdue? Because in order for an item to be automatically set to lost, it must have record of 1st and 2nd notices being sent before it can happen.

How to post Overdue Notices

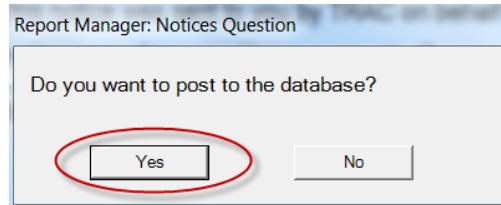
1. In Polaris, click on **Utilities** then **Reports and Notices**. Next, double click on the **Notices** folder and then the **Overdues** folder.



2. Within the **Overdues** folder you'll see several different Overdues and Billing reports to run. Please double click the **Overdues Full Page Mailer** (alternatively, you can run the Overdues Half Page Mailer Report, but unless you have half sheets of paper to feed your printer, you might as well run the Full Page Mailer).

| Name | Type | Date Modified |
|--|--------|--------------------|
| Billing Full Page Mailer | Report | 09/05/2011 9:21 AM |
| Billing Half Page Mailer | Report | 09/05/2011 9:21 AM |
| Billing Half Page Mailer Dot Matrix | Report | 09/05/2011 9:21 AM |
| Billing Postcard | Report | 09/05/2011 9:21 AM |
| Billing Z Fold Mailer | Report | 09/05/2011 9:21 AM |
| Billing Z Fold Mailer Oversized | Report | 09/05/2011 9:21 AM |
| Overdues Full Page Mailer | Report | 09/05/2011 9:21 AM |
| Overdues Half Page Mailer | Report | 09/05/2011 9:21 AM |
| Overdues Half Page Mailer Dot Matrix | Report | 09/05/2011 9:21 AM |
| Overdues Postcard | Report | 09/05/2011 9:21 AM |
| Overdues Z Fold Mailer | Report | 09/05/2011 9:21 AM |
| Overdues Z Fold Mailer Oversized | Report | 09/05/2011 9:21 AM |
| Patron Billing Statement by Organizations | Report | 09/05/2011 9:21 AM |
| Patron Billing Statement by Patron Barcode | Report | 09/05/2011 9:21 AM |

3. Once you double click on Overdues Full Page Mailer, you will be asked to specify your library. **Choose your library and hit submit.** The report will generate (it may take a few moments).



4. When the report is ready, a pop up box will appear and ask **Do you want to post to the database?** Please say **Yes**. *Note: by saying Yes you are accepting responsibility to contact the patrons listed in the report and let them know they have overdues.*

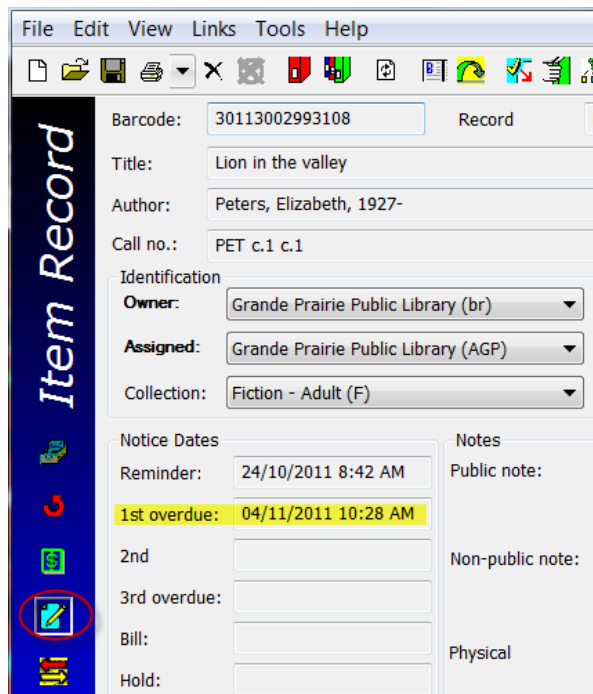
5. It is *extremely* important that you then print the Overdues Notices or save the file to your computer *as soon as you've posted* because you will not be able to retrieve the report if you close it before printing or saving.

6. Notify your patrons that they have overdue items. Use your best judgement in contacting the patron – by phone, mail or handing it to them the next time they're in.

Please note: this is different than the **Overdue Call List report**. The Overdue Call List report lists patrons who have items that could be just one or two days overdue, not just seven or fourteen. Also, running the overdue call list does not update the item or patron record in Polaris.

How to Tell if Posting Was Successful

You can check to see if posting to the database was successful by opening the item record of one of the overdue items. Click on the **Notes and Notices** view and then under **Notice Dates** you should see the date and time of when the item was posted.



2. Billing Notices

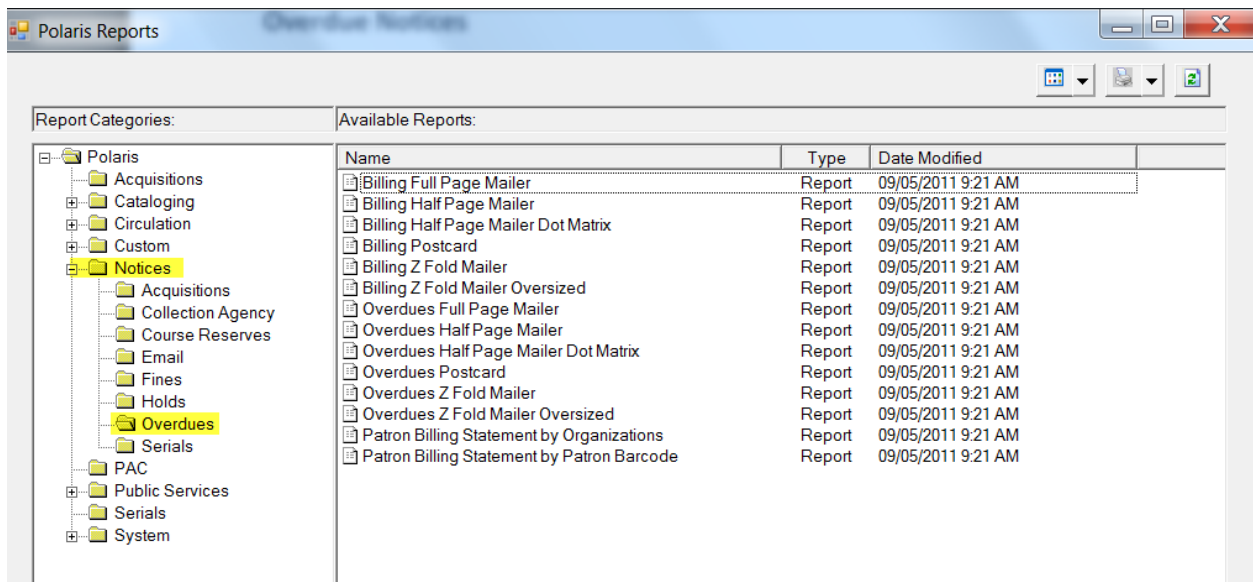
Billing Notices must be run for every patron, regardless of their notification option: Email, Text, Telephony or Mailing Address. A patron will never receive a phone call, text or email saying they have an item that has been converted to lost.

In order for the item to be converted to lost, the item record must indicate that the current patron has received a 1st and 2nd overdue notice, and the item must be a minimum of 35 days past due.

As soon as you say **Yes to Posting to the database**, the item's status will change from **Out** to **Lost**, and the **replacement fee** for the item will be charged to the patron's account. Depending on your settings, patrons may also be charged the overdue fines as well. Please contact PLS headquarters if you wish to have the overdue fees added or removed.

How to Post Billing Notices















1. You should still have the Notices folder open, however if you closed it, click on **Utilities** then **Reports and Notices**. Next, double click on the **Notices** folder and then the **Overdues** folder.



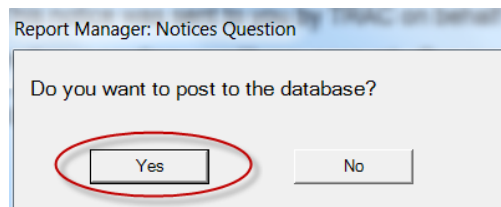
The screenshot shows the Polaris Reports application window. The left pane displays a tree view of report categories, with 'Notices' and 'Overdues' highlighted. The right pane displays a table of available reports.

| Name | Type | Date Modified |
|--|--------|--------------------|
| Billing Full Page Mailer | Report | 09/05/2011 9:21 AM |
| Billing Half Page Mailer | Report | 09/05/2011 9:21 AM |
| Billing Half Page Mailer Dot Matrix | Report | 09/05/2011 9:21 AM |
| Billing Postcard | Report | 09/05/2011 9:21 AM |
| Billing Z Fold Mailer | Report | 09/05/2011 9:21 AM |
| Billing Z Fold Mailer Oversized | Report | 09/05/2011 9:21 AM |
| Overdues Full Page Mailer | Report | 09/05/2011 9:21 AM |
| Overdues Half Page Mailer | Report | 09/05/2011 9:21 AM |
| Overdues Half Page Mailer Dot Matrix | Report | 09/05/2011 9:21 AM |
| Overdues Postcard | Report | 09/05/2011 9:21 AM |
| Overdues Z Fold Mailer | Report | 09/05/2011 9:21 AM |
| Overdues Z Fold Mailer Oversized | Report | 09/05/2011 9:21 AM |
| Patron Billing Statement by Organizations | Report | 09/05/2011 9:21 AM |
| Patron Billing Statement by Patron Barcode | Report | 09/05/2011 9:21 AM |

2. Within the **Overdues** folder you'll see several different Overdues and Billing reports to run. Please double click the **Billing Full Page Mailer** (alternatively, you can run the Billing Half Page Mailer report, but unless you have half sheets of paper to feed your printer, you might as well run the Full Page Mailer).

| Name | Type | Date Modified |
|--|--------|--------------------|
|  Billing Full Page Mailer | Report | 09/05/2011 9:21 AM |
|  Billing Half Page Mailer | Report | 09/05/2011 9:21 AM |
|  Billing Half Page Mailer Dot Matrix | Report | 09/05/2011 9:21 AM |
|  Billing Postcard | Report | 09/05/2011 9:21 AM |
|  Billing Z Fold Mailer | Report | 09/05/2011 9:21 AM |
|  Billing Z Fold Mailer Oversized | Report | 09/05/2011 9:21 AM |
|  Overdues Full Page Mailer | Report | 09/05/2011 9:21 AM |
|  Overdues Half Page Mailer | Report | 09/05/2011 9:21 AM |
|  Overdues Half Page Mailer Dot Matrix | Report | 09/05/2011 9:21 AM |
|  Overdues Postcard | Report | 09/05/2011 9:21 AM |
|  Overdues Z Fold Mailer | Report | 09/05/2011 9:21 AM |
|  Overdues Z Fold Mailer Oversized | Report | 09/05/2011 9:21 AM |
|  Patron Billing Statement by Organizations | Report | 09/05/2011 9:21 AM |
|  Patron Billing Statement by Patron Barcode | Report | 09/05/2011 9:21 AM |

3. Once you double click on Billing Full Page Mailer, you will be asked to specify your library. **Choose your library and hit submit.** The report will generate (it may take a few moments).



4. When the report is ready, a pop up box will appear and ask **Do you want to post to the database?** Please say **Yes**. *Note: by saying Yes you are accepting responsibility to mail the notices to the patrons listed in the report.*

5. It is *extremely* important that you then print the Billing Notices or save the file to your computer *as soon as you've posted* because you will not be able to retrieve the report if you close it before printing or saving.

6. Mail the notices to your patrons.

Please Remember to post your overdues and billings once a week!