**Daily/Weekly Report Instructions**

* List Charges (Claims Returned)
	+ Report is sent to Generic Circulation email and printed at opening
	+ Copy report to Word and format as needed; print report
	+ Search the shelves for the items. Be sure to check the appropriate shelf location, any displays, or anywhere “out of the ordinary” that a book might be
	+ Use the X O marking system
		- If you search for the item and find it, mark with an X
		- If you search for the item and don’t find it, mark with an O
		- If you did not search a particular item, no mark
	+ Discharge all found items (those marked with X)
	+ Use the Mark Item Missing Wizard to mark missing items that were not found (those marked with O)
* In-Transits – Rec’d. only on Wednesdays
	+ Report is sent to supervisor’s email and printed at opening
	+ Copy report to Word and format as needed; Print report
		- Currently, we only need to search the items that had a destination location of Rawlings
	+ Search the shelves for the items. Be sure to check the appropriate shelf location, any displays, or anywhere “out of the ordinary” that a book might be
	+ Use the X O marking system
		- If you search for the item and find it, mark with an X
		- If you search for the item and don’t find it, mark with an O
		- If you did not search a particular item, no mark
	+ Discharge all found items (those marked with X)
	+ Use the Mark Item Missing Wizard to mark missing items that were not found (those marked with O)
	+ Searches should be completed by Friday afternoon
* Failed Calls
	+ Report is sent to Generic Circulation email and printed at opening
	+ Copy report to Word and format as needed; print report
	+ Query each account by customer last name
	+ Verify you are in the correct account by comparing the address
	+ Using Modify User, note the customer’s account as follows
		- 4/26/10 Failed Call Notice; update phone number TT/RA
	+ Change account profile to ALERT (this is not ready to be used as of 5/3)
	+ DO NOT change the notification preference
* Unverified Holds
	+ Report is sent to Generic Circulation email and printed at opening
	+ Copy report to Word and format as needed; print report, if necessary
	+ Call each customer to inform them of available holds and pick-up location
	+ Remind them of their unverified status and ask them to bring proof of address
	+ If you are unable to reach the customer via phone, mail the notice
	+ \***Unverified holds must be completed the same day they are reported/printed**
* New Users
	+ Report is sent to Generic Circulation email and printed at opening – (Only Angelica or I need to print this report, currently)
	+ Copy report to Word and format as needed; print report
	+ Query each account by customer **last name and first initial** using the **BROWSE** feature
		- Check for duplicate accounts (verify DOB)
		- Check residency status (compare to address)
		- Verify the expiration date is appropriate for the profile (three years for most, 30 days for Unverified users) and is not set to NEVER
		- Verify the PIN matches the DOB in both locations where the date of birth is entered
		- Verify there is a notification preference
		- Verify
		- Double check address, phone number, email address, etc.
		- Check the entire record for:
			* All caps (except email address)
			* Typos/misspellings
			* Proper abbreviations
			* No punctuation
			* Suffixes – after middle name
			* No symbols (ex: #)
	+ Make changes to the accounts as necessary
	+ Print summary pages for duplicate accounts (including summary, address and extended info) and forward to supervisor