**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