**Public Services Reports**

To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Services**.

Patron Services Reports

The following reports can help you gather statistics about the patrons registered in your system and at specific branches.

* Associated Patron Groups Report - Lists all patron records that are linked in associations (whether or not these are blocking relationships). You can select one, many, or all patron registration branches. The report lists all patron records from the selected branches that have one or more associated patron records, and lists the associated records for each patron. Each patron’s full name, patron code, and barcode is included. Patrons are listed in alphabetic order by last name.
* Expired Patrons - Lists information about patrons whose registration has expired before a specified date. The report is sorted by organization and expiration date. You can filter this report by organization.
* Inactive Patrons - Lists information about patrons registered during a specified date range whose accounts show no activity since the end date of the range. The report includes the patron’s last activity date. The report is sorted by organization, last activity date, and patron name. You can filter this report by organization. The Last Activity Date field in the patron record is updated in these circumstances:
  + Staff client - Item check-out; renewal; quick-circ item check-out; when a claim is made on an item
  + PAC - Log-in to patron account; placing and modifying hold and ILL requests; online renewal; patron information updates; payments; access to remote databases that require log-in
  + Polaris ExpressCheck, SIP self-check units - Check-out and renewal; patron account access; payments
  + Time and print management applications - Log-in
  + Inbound telephony - Account information access; item renewal
* Patron Library Assigned Blocks - Lists patron records with library-assigned blocks. You can select one, many, or all organizations, and select one, many, or all library-assigned blocks. The list of block available for selection depends on the organizations you have selected. The report lists currently blocked patron records according to your selections, and totals the number of unique patrons. That is, if a patron has more than one block, that patron is counted only once for the total.
* Patron Register - Reports the total number of patrons, by patron code, who were registered during a specified time period. The report is sorted by organization and patron code. You can filter this report by organization.
* Patrons Registered by Zip Code - Reports the total number of patrons who were registered, according to postal code, during a specified time period. The report is sorted by organization and Zip code. You can filter this report by organization.
* Patrons Without Addresses - Identifies and lists information about patrons registered before a specified date whose accounts do not include an address. The report is sorted by organization and patron name. You can filter this report by organization.
* Patrons with Messages Report - This report provides a snapshot of read and unread messages currently in patron accounts where the patron’s registered branch matches the selected branch or branches and where the patron record has at least one message, read or unread. The report includes patron names, message text, whether the message is read, the date the message was created, and the creator.
* Verify Patron Data - Lists patrons who are currently blocked because they have self-registered or they have made account changes through the PAC. The report is sorted by organization and patron name. You can filter this report by organization.
* Statistical Summary - To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System**. See [System Reports](https://documentation.iii.com/polaris/7.7/PolarisStaffHelp/Polaris_Basics/PIreports/System_Reports.htm#System).

Patron Financial Reports

To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Financial** in the Polaris Reports dialog box. The following reports can assist you in processing and evaluating patron financial transactions:

**Note:**For information on reports regarding patron credit card payments, see [E-Commerce Credit Card Reports](https://documentation.iii.com/polaris/7.7/PolarisStaffHelp/Polaris_Basics/PIreports/Public_Services_Reports.htm#E-Commer).

* Billed Patrons - Identifies patrons who have received a billing notice. The report includes basic item information and the amount owed by each patron, sorted by organization name and patron name. You can filter the report by organization.
* Collection Agency Detail - Reports all patron accounts submitted to collection that show account activity within a specified date range. It shows who has been reported during that time period, even though a patron’s standing with regard to the collection agency may have changed after that time period. You can also run it for a time period ending at the current date to get a picture of any patron’s current standing with regard to the collection agency. The report lists details of the account activity for each patron, grouped by organization. Organizations and amounts are based on the library’s settings for reporting level (system, library, or branch) and reporting branch (item’s branch, patron’s branch, or loaning branch) set in Polaris Administration.

**Examples:**Reporting level is Branch - Patrons with activity based on reporting branch (by patron’s branch, item’s branch, or loaning branch). That is, if the reporting branch is loaning branch, then a report for the branch will include all patrons reported because they checked the item out at the branch.  
Reporting level is **System** - Patrons with activity during the specified period, regardless of how they were reported (by patron’s branch, item’s branch, or loaning branch).

* Collection Agency Summary - Identifies all patrons who have been reported to a collection agency and the amounts they owe, grouped by organization.
* Daily Cash Drawer - Reports the financial transactions completed on a workstation, including the time of each transaction and the operator. The report includes totals for each type of transaction (Payment, Charge, and Waive), totals for all cash taken in and paid out, and the net balance for the specified time period. You may want to coordinate this report with the times that various staff members use a particular workstation for patron accounting transactions.
* Donations - Credit Card Payments - PayPal® Payflow Pro®, Payflow Link, or Comprise™ SmartPAY™. Lists donation payments, including details such as the amount, the purpose, whether the donor wants a printed acknowledgment and, if so, the donor’s address; includes credits and voided transactions. You can filter this report by a date range and by organization. The report includes subtotals by organization. The organization is the branch the donor has designated to receive the gift. Use this report to distribute donations to the appropriate organizations. Run the report at the system level to view voided transactions.

**Note:**Printed acknowledgments are not automatically generated. Using the information on the report, you can create and send your own acknowledgments.

**Note:**The **Donations - Credit Card Payments** report records payments made through Payflow Link, but do not reflect credit or void transactions.

* Financial Transaction Summary by Fee Reason - Reports patron financial transactions, organized by transaction (fee) reason, for a selected transaction date range. You can select one, many, or all branches (transacting organizations). If the transaction is a payment, waive, or refund, the transaction is included even if the initial charge was prior to the date range. You can also choose to include or exclude credit card transactions. The detail section of the report lists transactions grouped by transaction reason (such as overdue item) and the total payments for that reason. Transaction details include the date, amount, payment method, operator, and patron barcode, and are sorted by transaction date/time. The summary section of the report lists the totals for all branches included in the report, with the total amounts for each transaction reason. A separate summary reports the total of all debit transactions. These include refunds from payments, refunds from deposits, and credits from deposits. (Individual debit transactions are not included in the report detail.) A separate summary for waive transactions is also included. The following patron financial transactions are included:
  + Charges - A charge may be created manually by staff, created automatically by a process such as an overdue or hold request, or created by a third-party device.
  + Payments - A payment may be made by staff in the staff client, by the patron from PAC, or via a third-party device.
  + Waives - Waives may be created manually, or automatically when a lost item is returned. A total of all waives is included in a separate summary at the end of the report, but individual waive transactions are not included in the detail section of the report.
  + Refunds - Cash or check refunds. These are summarized at the end of the report but are not included in the detail section of the report.
  + Credits - Amounts are credited to a patron account under certain circumstances, such as when a lost and paid for item is recovered. Staff members with appropriate permission can manually create a credit.

**Note:**Deposits and deposit returns are not included in the reported patron financial transactions.

* Financial Transaction Summary by Payment Type - This report is similar to the Financial Transaction Summary by Fee Reason report, but lists only payment transactions. All payment methods are included. The detail section of the report lists the transaction date, transaction reason, item barcode and title if applicable, operator, workstation, patron barcode, and amount. This section is grouped by payment method and sorted by transaction date/time. The summary section of the report includes the total for each payment method, the total for all payment methods per branch, and grand totals for all selected branches.
* Fines and Fees - Lists fines and fees transactions according to transaction type (such as payments, waives, refunds, and charges), during a specified time period. The report provides detailed information on each transaction, including the transaction date, reason, and amount; the item barcode and title; the computer workstation and operator; the patron barcode; and totals for each transaction type and library. Charges are listed on the report according to the governing library for fine calculation. Payments, credits, and waives are listed according to the library where the transaction took place. You can filter this report by organization, including the system organization. If you prefer a summary, run the Fines and Fees Summary report.
* Fines and Fees Summary - For a specified date range, reports the total amounts for fines and fees transactions (for example, payments, waives, refunds, and charges), according to transaction type. You can filter this report by organization, including the system organization.
* **Fines by Amount** - This report provides basic information about patrons with account charges in a specified range of amounts. You select one, several, or all branches in the system and specify a fine amount range. The branches are patrons’ branches; for the fine amount range, valid **From** and **To** values are $0.00 up to  $9,999,999.99. The **To** value must be greater than the **From** value. (The amount includes all charges, not just fines.) The report lists all patrons by selected registered branch who have any outstanding unpaid charges within the specified fine range. The report is divided into sections by registered branch. Within each branch section, the report is sorted by patron last name and amount. Totals of all amounts owed for each branch are included, as well as the grand total of amounts owed for all selected branches. Includes the following information for each patron:
  + Patron barcode
  + Patron name - Last, First Middle, Suffix
  + **Patron code**
  + **E-mail address**
  + **Postal address**
  + Phone - Lists all phone numbers and carriers, if appropriate
  + Charges - The total amount of charges owed.
* Waived Fines - Reports all waived fines during a specified period, including the staff member and computer workstation responsible for each waive transaction. The report groups the auto-waived fines (fines that are automatically waived at check-in, if any) and regularly waived fines (fines manually waived by staff members). It also includes an auto-waive total, waive total, and grand total for each patron, as well as a total for each organization. The report is sorted by organization, patron name, and transaction type (auto-waive and waive). You can filter this report by organization.

E-Commerce Credit Card Reports

These reports help you track credit card transactions. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Financial** in the Polaris Reports dialog box.

* Fines and Fees - Credit Card Payments - EnvisionWare, PayPal Payflow Pro, Payflow Link, or Comprise SmartPAY. Lists payments for charges, including details such as each patron’s total payment credit transaction ID, as well as individual charges and processing fees, the items associated with charges, and the patron barcode. Declined transactions, credits, and voided transactions are also listed. You can filter this report by a date range and by organization. The report includes subtotals by organization. The organization is the organization associated with individual charges on the patron’s account. The report does not include payments made through SIP self-check stations. The report is grouped by the ILSStoreOrderID, Patron Barcode and Date. If a patron makes multiple credit card payments in a single day, the payments will be grouped under the first transaction of the day.

**Note:**The **Fines and Fees - Credit Card Payments** report records payments made through Payflow Link, but do not reflect credit or void transactions.

* Hosted Credit Card Payments - Payflow Link, Payments Gateway, or Comprise SmartPAY. Tracks credit card payments in the patron account made through the hosted gateway. You can set a date range and select one, several, or all organizations, and set a sort order by patron barcode, StoreOrder ID, or transaction date. The organization is the patron’s registered branch for fines and fees payments, or the receiving branch for donations.

**Note:**If your library accepts credit card payments through a hosted gateway for reasons other than patron fines and fees or donations, such as gift shop purchases, those payments do not appear on the Polaris Hosted Credit Card Payments report. However, the transactions are available in the hosted gateway’s reports.

* Refunds to Credit Card Payments - Payflow Link, Payments Gateway, or Comprise SmartPAY. Helps you track refunds to credit card payments that have been made in the Polaris patron account. Use this report to reconcile refund transactions made in Polaris with transactions in hosted gateways. You can set a date range and select one, several, or all organizations.

Active Network (Class) POS Reports

These reports help you reconcile Class POS transactions in Polaris. On the Polaris Shortcut Bar, select **Utilities, Reports and Notices, Public Services, Patron Financial**, **Active Network POS**.

* Daily Cash Balance Detail - For Class POS customers. Reports payments by payment type per the POS detail during a specified date range. The report includes only those POS payments taken in Polaris.
* Daily Cash Drawer POS - For Class POS customers. A copy of the Daily Cash Drawer report that includes the POS Transaction ID for payment transactions.
* Non POS Payments - For Class POS customers. For a specified date range, this report lists all payments made in Polaris that did not go through the POS system.
* Sales Summary Report - For Class POS customers. This report is comparable to a similar CLASS report that summarizes all payments, refunds, and adjustments by reason for a specified date range. You can select organization (including the system organization), workstation, and user parameters.

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