Resource Sharing Alliance NFP
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Billing a User Cheat Sheet

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The Billing a User wizard is used to add a bill to a user account. It is not used to bill a user for replacing a lost item. If an item is lost, let the item run through the overdue and billing cycle or use the Mark Item Lost wizard. Some reasons for adding a bill are damaged item, removed barcode, or photocopying,

1. Enter the user's ID in the "User ID:" box

2. In the Enter Item & Bill Information section:
   a. Reason for bill: Use the arrow at the end of the box to display the reason list.
      i. Reasons beginning with CARL, CAR-, and C- are reasons from the former circulation software. <u>Do not use.</u>
      ii. Some reasons must have an item ID.
   b. Amount: Enter an amount.
   c. Item ID:
      i. If the Reason for the bill is associated with an item, this box must be filled in.
      ii. If the Reason for the bill is not associated with an item, the box is grayed out.
   d. Payment type: If needed, select a payment type. The default Payment type is CASH.

3. After entering the information:
   a. If the patron is immediately paying the bill:
      i. Click the Pay Now button on the bottom of the screen.
      ii. Information for the bill will appear in the bottom window.
      iii. The Bill Status will be PAID.
   b. If the patron is <u>not</u> immediately paying the bill:
      i. Click the Bill User button on the bottom of the screen.
      ii. Information for the bill will appear in the bottom window.
      iii. The Bill Status will be BILLED.

4. Click the Close button at the bottom of the screen to close the wizard.

Whenever the patron's user ID is entered into WorkFlows, a popup box will appear as an alert to the staff if they have bills. Staff will be given the option of checking out to the user, investigating the bill, paying the bill, or canceling the process.

Contact the RSA help desk at help@rsanfp.org or RSA staff at 866-940-4083