Adding a Bill and Bill Note before Removing a Lost Item Guide
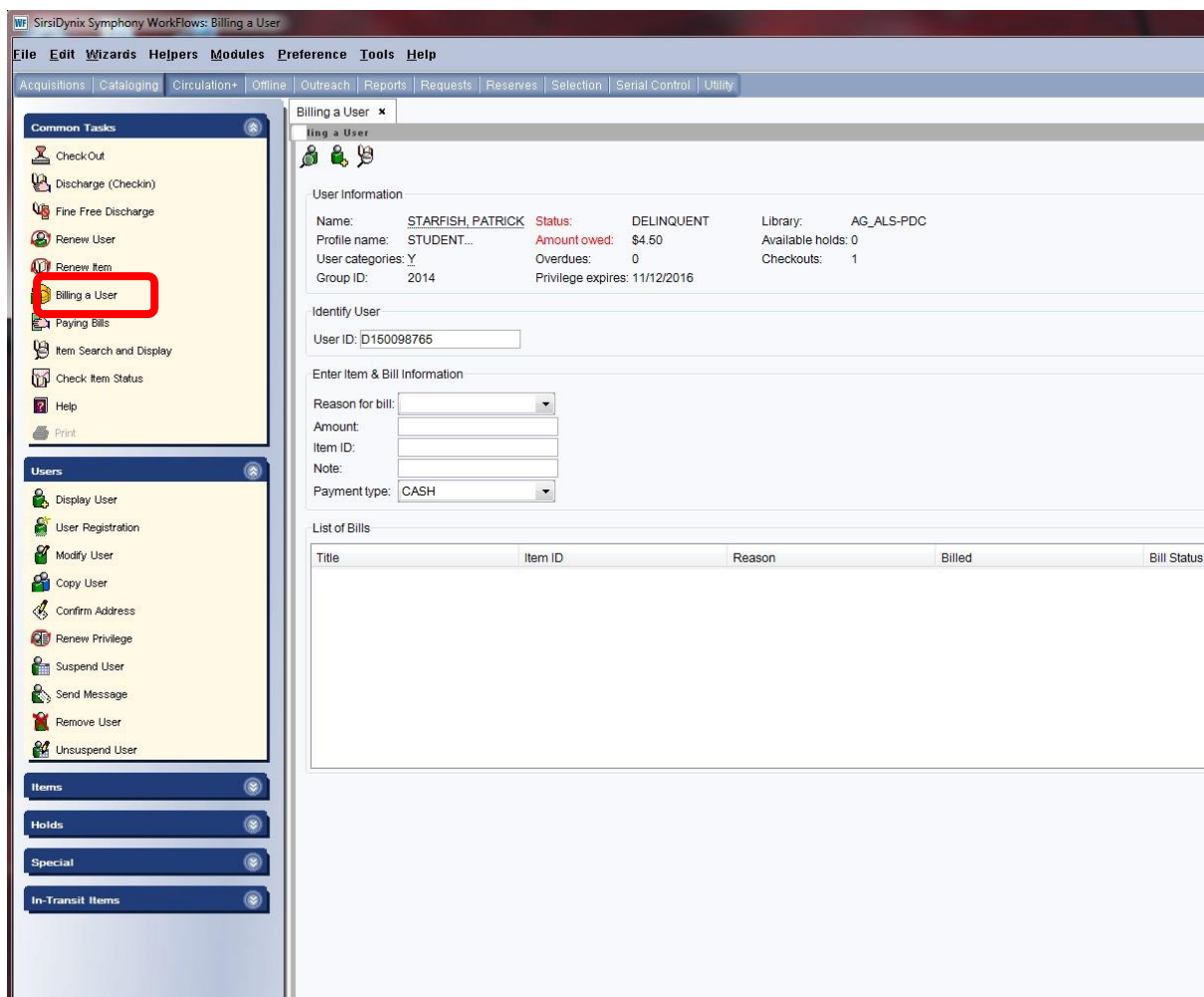
Last updated: August 26, 2024

There is a video to accompany this guide which can be found here:
https://www.youtube.com/watch?v=38x3vJn96yI.

The "Reason for bill" drop-down menu in the "Billing User" wizard contains the bill reason LOST-NO-ID. This bill reason will allow a library to create a bill for a lost item that includes the title and item ID. After creating the bill, the lost item can be discharged and deleted from the RSA database. The patron's user account will retain the item information in the bill note.

Billing a User wizard: (creating a new bill with a note)

1. Open the "Billing a User" wizard located in the "Common Tasks" group.
2. Scan the patron's ID into the User ID box or search for the patron using the User Search helper.
3. Reason for bill:
   - Select "LOST-NO-ID."
4. Amount:
   - Enter the replacement cost of the lost item. If your library charges a processing fee, the amount of the processing fee can be added to the replacement cost, or a separate bill may be added for the processing fee.
5. Item ID:
   - The Item ID box will be grayed out since the item ID will be removed from WorkFlows
6. Note:
   - Enter a note to clarify reason for the bill:
     i. Begin note with one of these options:
        1. Item withdrawn
        2. Processing fee for item withdrawn (If entering processing fee separately)
     ii. Include title of item being withdrawn from the RSA database
     iii. Include the ID (barcode) of the item being withdrawn from the RSA database
     iv. Add date
     v. Add staff initials
     vi. Add the name of the library entering the note
     vii. Examples:
        Item withdrawn -- The trustee of a small public library -- A13300034865 7- 22-14 MT RSA, or
        Processing fee for item withdrawn --- The trustee of a small public library -- A13300034865 7-22-14 MT RSA
7. Payment type:
   - Leave at "Cash"
   - Click "Bill User" button on the bottom of the "Billing a User" wizard screen.

8 The List of Bills display window will now include the information for the item being withdrawn.
   - The Title and Item ID columns will be blank.
   - The Notes column includes the note information for the item that is being deleted from WorkFlows.

9. Click the "Close" button on bottom of screen.
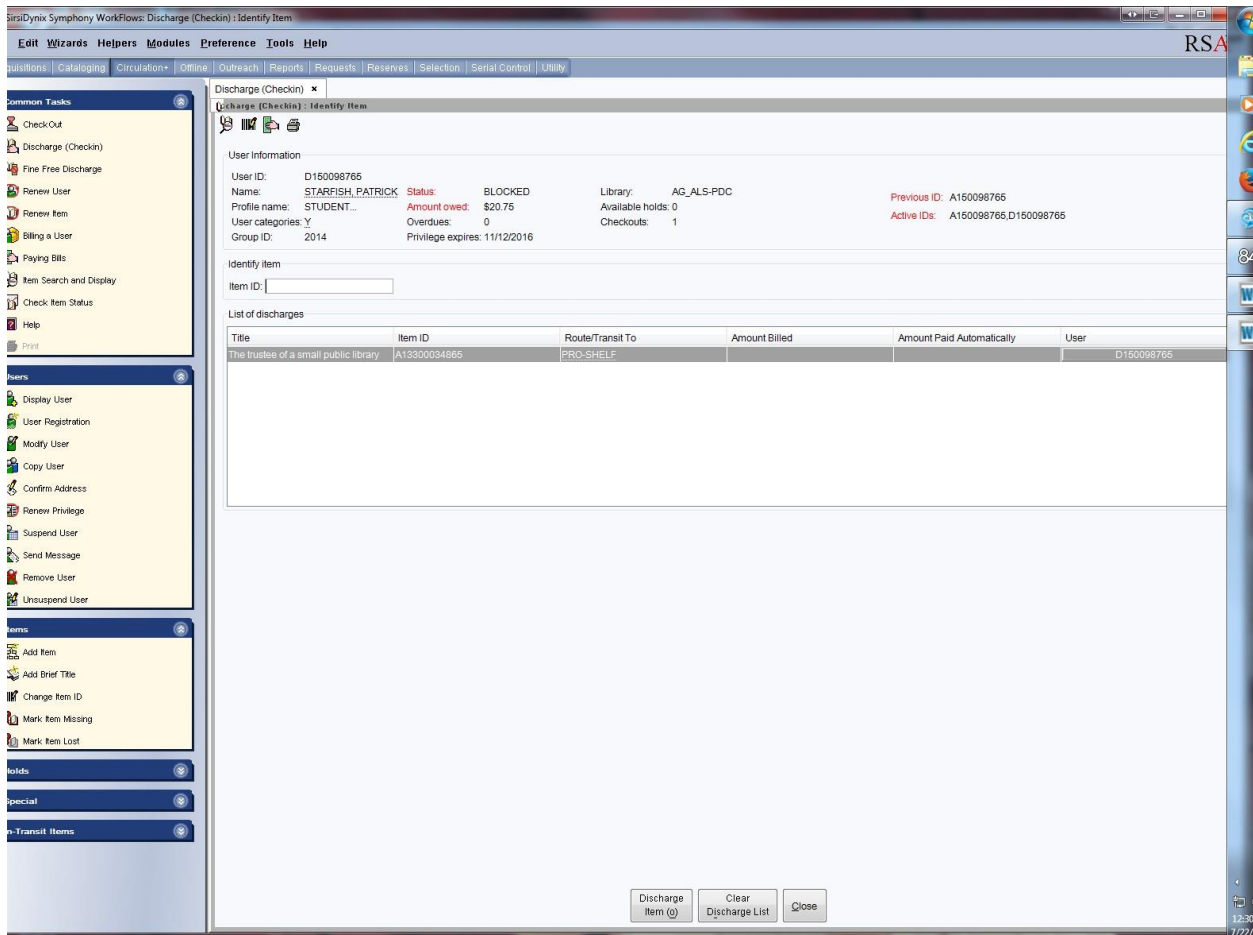
10. Open the" Discharge" wizard and discharge the item to be withdrawn.
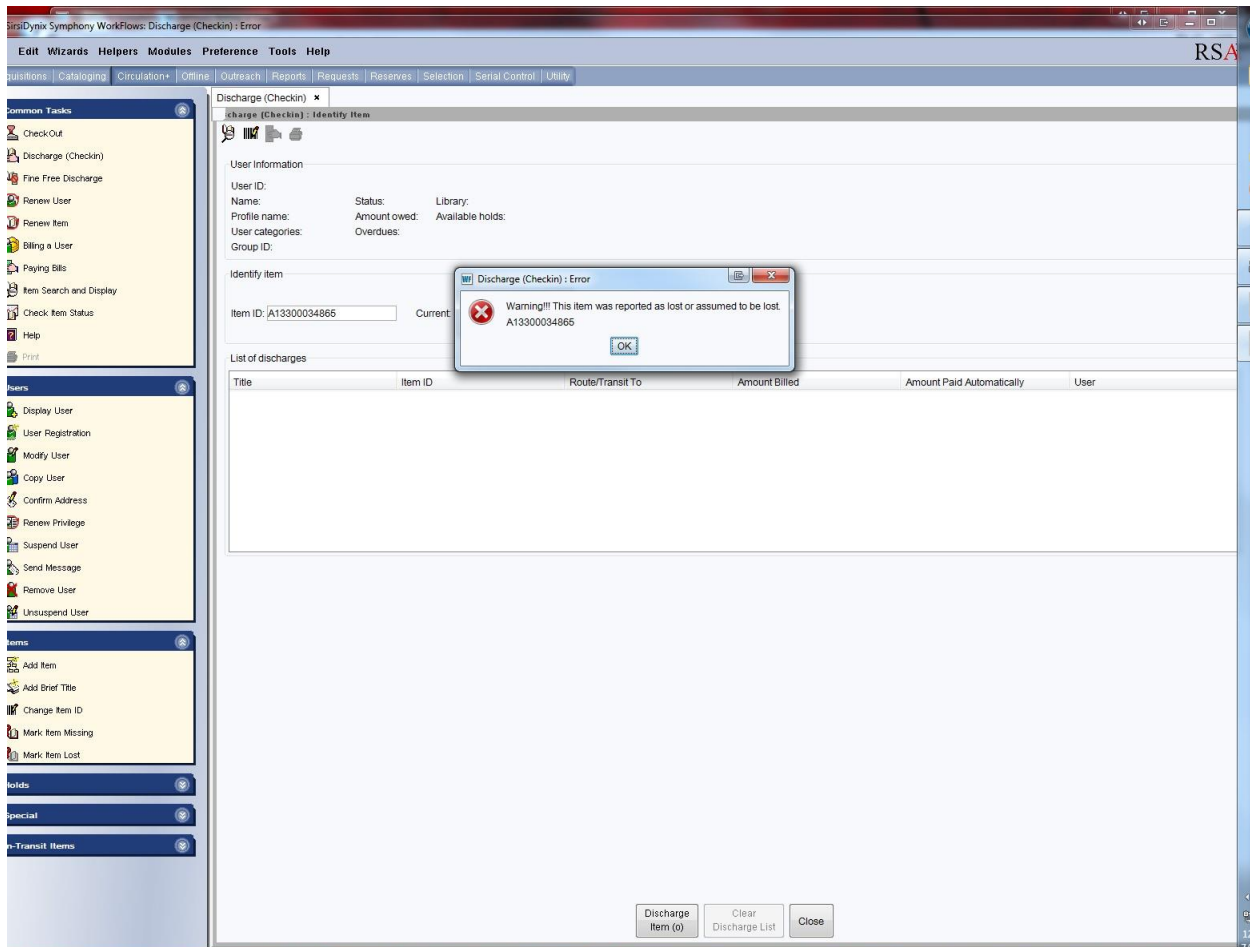
- A warning box will appear alerting staff that the item has been reported lost.

11. Click "OK" on the warning box.

The item is now discharge and can be deleted from the RSA database by:
- Checking the item out to your library's Discard user
  - The item will be shadowed in RSA Cat and WorkFlows
  - The item will not be available for holds
  - Periodically request the RSA Systems Administrator to run a report to delete your Discard items
- Deleting the item using the "Delete Title, Call Numbers or Items" wizard in the "Titles" group in the Cataloging module

To view the complete note:
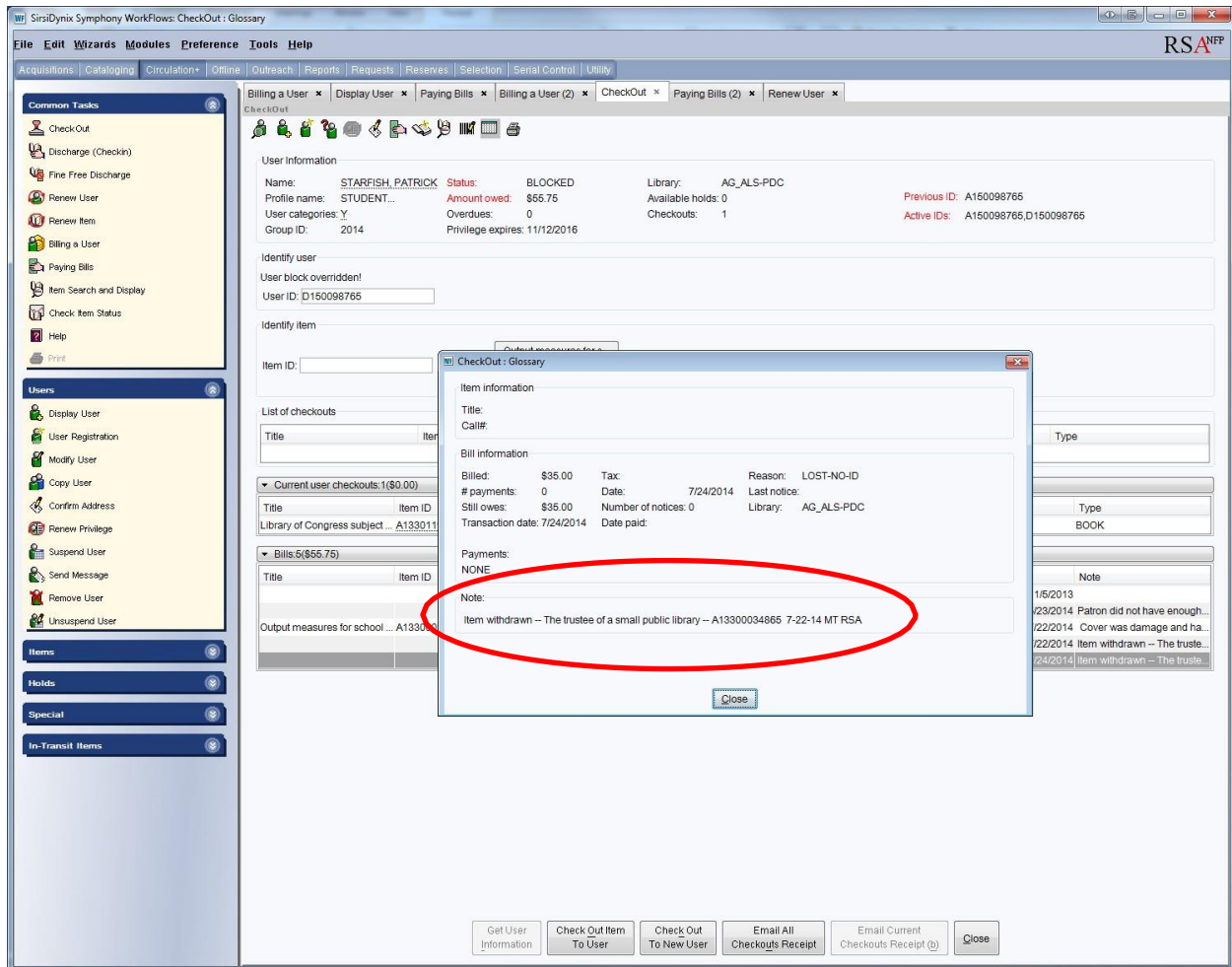
In any wizard that displays the bill note:

12. Click on the amount billed in the "Owes" column of the "Bills" display window. The dollar amount is underlined. Anytime text is underlined in WorkFlows the underlined text can be clicked and more information is displayed. This is called a glossary.

The "CheckOut: Glossary" contains a "Note" section that displays the complete bill note.

13. After viewing the "CheckOut: Glossary" click the "Close" button to close the popup.

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