

## 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: <u>https://www.youtube.com/watch?v=38x3vJn96yl</u>.

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)

WF SirsiDynix Symphony WorkFlows: Billing a User	A CONTRACTOR OF					
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Acquisitions   Cataloging   Circulation+   Offline	Outreach   Reports   Requests	Reserves Selection !	Serial Control   Utility			
	Billing a User ×					
Common Tasks	ling a User					
CheckOut						
Discharge (Checkin)	User Information					
V Fine Free Discharge	Name: STARFISH,	PATRICK Status:	DELINQUENT	Library: AG_ALS-PDC		
Benew User	Profile name: STUDENT.	Amount owed:	\$4.50	Available holds: 0 Checkoute: 1		
Renew Item	Group ID: 2014	Privilege expire	s: 11/12/2016	Checkouts.		
Billing a User	Identify User					
A Paying Bills	User ID: D150098765					
Hem Search and Display						
Check Item Status	Enter Item & Bill Information	1				
P Help	Reason for bill:					
Print	Item ID:					
Users	Note:					
🔒 Display User	Payment type: CASH					
User Registration	List of Bills					
Modify User	Title	Item ID	F	leason	Billed	Bill Status
Copy User						
Confirm Address						
Renew Privilege						
Suspend User						
Send Message						
🖹 Remove User						
🙀 Unsuspend User						
Items 🛞						
Holds						
Special						
In-Transit Items						

- 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.

SirsiDynix Symphony WorkFlows: Billing a User					
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quisitions Cataloging Circulation+ Offlin	e   Outreach   Reports   Requests   Reserves   S	election Serial Control Utility			
Samman Tarker	Paying Bills × Billing a User ×				
CheckOut	Riling a User				
A Discharge (Checkin)					(
Eine Free Discharge	User Information				
Renew User	Name: STARFISH, PATRICK Statu Profile name: STUDENT Amo	s: BLOCKED Library: untowed: \$32.00 Available ho	AG_ALS-PDC	Previous ID: A150098765	
Renew tem	User categories: Y Over	dues: 0 Checkouts:	2	Active IDs: A150098765,D1500987	65
Billing a User	Group ID: 2014 Privi	ege expires: 11/12/2016			2
Paying Bills	Identify User				8
Rem Search and Display	User ID: D150098765				
Check Item Status	Enter Item & Bill Information				W
2 Help	Reason for bill:				5
🕤 Print	Amount:				N.
kar	Item ID:				
Dimlay Unar	Payment type: CASH •				
Liser Registration	List of Bills				
Modify Liser	Title Item II	Pageon	Pilled	Pill Status	Noto
Copy User	interince interince	LOST-NO-ID	Dilled	\$11.25 Billed	Item withdrawn The trustee of a s
Confirm Address					
Renew Privilege					
Suspend User					
Send Message					
Remove User					
Unsuspend User					
The Avid Rem					
Add Reinf Title					
Change frem ID					
Mark tem Missing					
Mark Item Lost					
folds 🛞					
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n-Transit Items					
		Get User	Inor Bou Now (d) Bill	Class	90
		Information	Another User (g)	21035	12:20
					7/22

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
  - $_{\odot}$  The item will be shadowed in RSA Cat and WorkFlows
  - $\circ$  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:

WF SirsiDynix Symphony WorkFlows: CheckOut							
Eile Edit Wizards Helpers Modules Pre	eference <u>T</u> ools <u>H</u> elp						RSANFP
Acquisitions   Cataloging Circulation+   Offline	Outreach   Reports   Requests	Reserves Selection	Serial Control Utility				
	Billing a User × Display User	× Paying Bills × Bi	lling a User (2) 🗴 CheckO	ut × Paying Bills	(2) × Renew User ×		
	heckOut	k 🚓 (A) 🗤 📶	=				
		p 🖇 ye ilik 🛄 (	3				
Discharge (Uneckin)	User Information						
Fine Free Discharge	Name: STARFISH,	PATRICK Status:	BLOCKED	Library: /	NG_ALS-PDC	Provinue ID: A1E000976E	
Kenew User	User categories: Y	Overdues:	\$55.75 0	Available holds: ( Checkouts: 1		Active IDs: A150098765.	D150098765
Renew Rem	Group ID: 2014	Privilege expir	res: 11/12/2016				
Burg a User	Identify user						
ig_, д Paying Bills	User block overridden!						
B item search and Display	User ID: D150098765						
Up check item Status	Identify item						
Current President		0	utput measures for s				
e Pres	Item ID:	Current	LS 027.80MSL/1999				
Users 🛞			X13300027410				
🔒 Display User	List of checkouts						
User Registration	Title	Item ID	Date Due		Billed	Amount Paid Automatically	Туре
省 Modify User							
🔗 Copy User	▼ Current user checkouts:1(\$	0.00)					
Confirm Address	Title	Item ID	Date Charged	Date Due	Recall Date Due	Status	Туре
Renew Privilege	Library of Congress subject	A13301196490	5/22/2014	4,9:26	6/23/2014,23:59	Overdue	BOOK
Suspend User	▼ Bills:5(\$55.75)						
Send Message	Title	Item ID	Reason	Owes	Billed	Date	Note
👔 Remove User			FAXING		\$4.50	\$4.50	11/5/2013
au Unsuspend User	Output measures for school	A13300027410	FAXING		\$4.00 \$1.00	\$4.00 \$1.00	5/23/2014 Patron did not have enough 7/22/2014 Cover was damage and ha
	oupur measures for serios	110000021410	LOST-NO-ID		\$11.25	\$11.25	7/22/2014 Item withdrawn The truste
items 🐨			LOST-NO-ID		\$35.00	\$35.00	7/24/2014 Item withdrawn The truste
Holds							
Special							
In-Transit Items							
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		Get U Inform	Jser Check Out Item ation To User	Check Out To New User	Email All Email Checkouts Receipt Checkouts	Current Receipt (b) Close	

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

SirsiDynix Symphony WorkFlows: CheckOut : Gl	lossary	
Eile Edit Wizards Modules Preference	e Tools Help	RSANFP
Acquisitions Cataloging Circulation+ Offline	e   Outreach   Reports   Reguests   Reserves   Selection   Serial Control   Utility	
Common Tasks	Billing a User x Display User x Paying Bills x Billing a User (2) x CheckOut × Paying Bills (2) x Renew User x CheckOut	
LeckOut	ا الله الله الله الله الله الله الله ال	
🖳 Discharge (Checkin)	User Information	
Fine Free Discharge	Name: STARFISH PATRICK Status: BLOCKED Library: AG_ALS-PDC	
A Renew User	Profile name: STUDENT Amount owed: \$55.75 Available holds: 0 Previous ID: A150098765 User categories: Y Overflues: 0 Checkputs: 1 Active ID: A150092765 D	150009765
W Renew Item	Group ID: 2014 Privilege expires: 11/12/2016	13038703
Biling a User	Identify user	
Ent Paying Bills	User block overridden!	
B Item Search and Display	User ID: D150098765	
Check item Status	Identify item	
A Drive		
PILK	Item ID:	
Users	Item information	
💑 Display User	List of checkouts Tille: Califf:	
Ser Registration	Title Iter	Туре
Modify User	Dillinit C25.00 Tay: Dopport LOCT MO ID	
🗳 Copy User	Current user checkouts: 1(\$0.00)     # payments: 0 Date: 7/24/2014 Last notice:	
K Confirm Address	Title Item ID Still owes: \$35.00 Number of notices: 0 Library: AG_ALS-PDC	Туре
Renew Privilege	Library or Congress subject A133011 Transaction date. 124/2014 Date paid.	BUUK
Suspend User		
Send Message	Title Item ID Nove	Note
E Remove User	Note:	23/2014 Patron did not have enough
Unsuspend User	Output measures for school A133050	22/2014 Cover was damage and ha
Items		22/2014 Item Withdrawn The truste
Holds		
	Qiose	
special		
In-Transit Items		
	Coll Lear Check Out Hom Check Out Empil All Freed Oursest	
	Information To User To New User Checkouts Receipt Checkouts Receipt (b) Close	

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