

Adding a Bill and Bill Note before Removing a Lost Item Guide

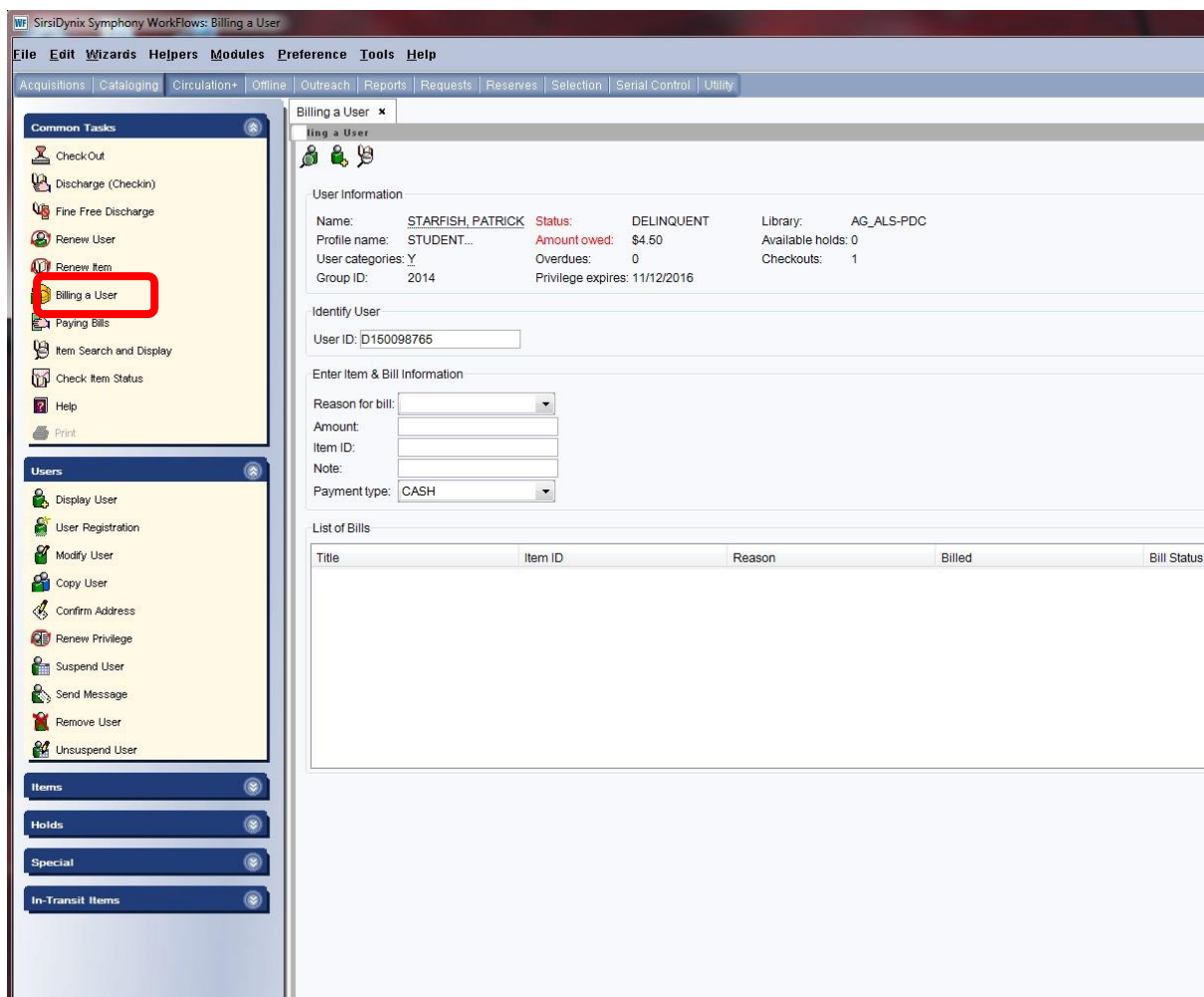
Last updated: August 26, 2024

There is a video to accompany this guide which can be found here:

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

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)



The screenshot shows the "Billing a User" wizard in the SirsiDynix Symphony WorkFlows application. The interface includes a menu on the left with "Billing a User" highlighted in a red box. The main window displays user information for Patrick Starfish, a delinquent student with an amount owed of \$4.50. Below this, there are fields for "Identify User" (User ID: D150098765) and "Enter Item & Bill Information". The "Reason for bill" dropdown is currently empty. At the bottom, there is a "List of Bills" table with columns for Title, Item ID, Reason, Billed, and Bill Status.

Title	Item ID	Reason	Billed	Bill Status

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 Item withdrawn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 Processing fee for item withdrawn (If entering processing fee separately)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 Include title of item being withdrawn from the RSA database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 Include the ID (barcode) of the item being withdrawn from the RSA database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.

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Common Tasks

- Check Out
- Discharge (Checkin)
- Fine Free Discharge
- Renew User
- Renew Item
- Billing a User
- Paying Bills
- Item Search and Display
- Check Item Status
- Help
- Print

Users

- Display User
- User Registration
- Modify User
- Copy User
- Confirm Address
- Renew Privilege
- Suspend User
- Send Message
- Remove User
- Unsuspend User

Items

- Add Item
- Add Brief Title
- Change Item ID
- Mark Item Missing
- Mark Item Lost

Holds

Special

In-Transit Items

Paying Bills x Billing a User x

User Information

Name: STARFISH, PATRICK Status: BLOCKED Library: AG_ALS-PDC
Profile name: STUDENT... Amount owed: \$32.00 Available holds: 0 Previous ID: A150098765
User categories: Y Overdues: 0 Checkouts: 2 Active IDs: A150098765, D150098765
Group ID: 2014 Privilege expires: 11/12/2016

Identify User

User ID: D150098765

Enter Item & Bill Information

Reason for bill: [dropdown]
Amount: [input]
Item ID: [input]
Note: [input]
Payment type: CASH [dropdown]

List of Bills

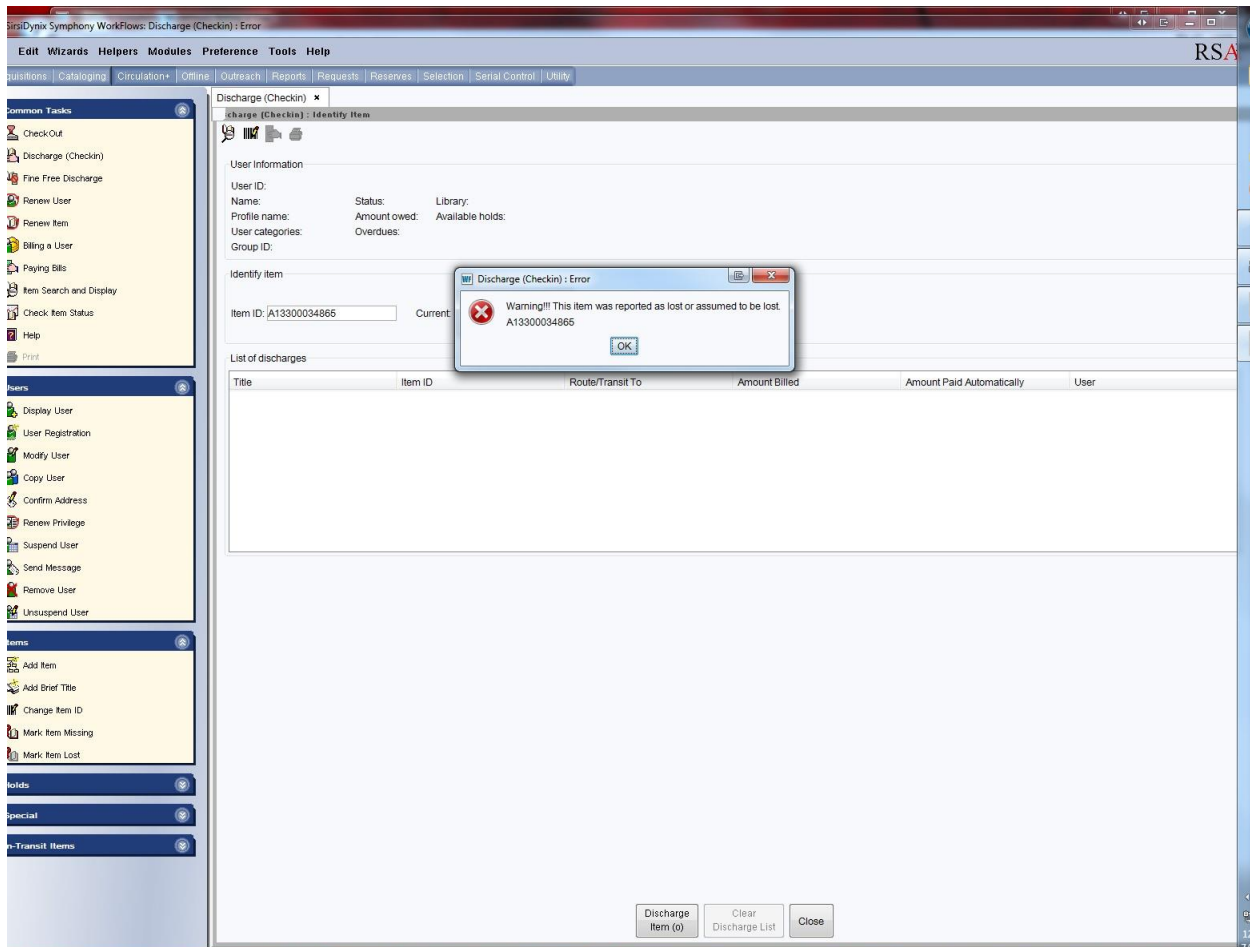
Title	Item ID	Reason	Billed	Bill Status	Note
		LOST-NO-ID		\$11.25 Billed	Item withdrawn -- The trustee of a s...

Get User Information Bill User Pay Now (d) Bill Another User (g) Close

9. Click the “Close” button on bottom of screen.

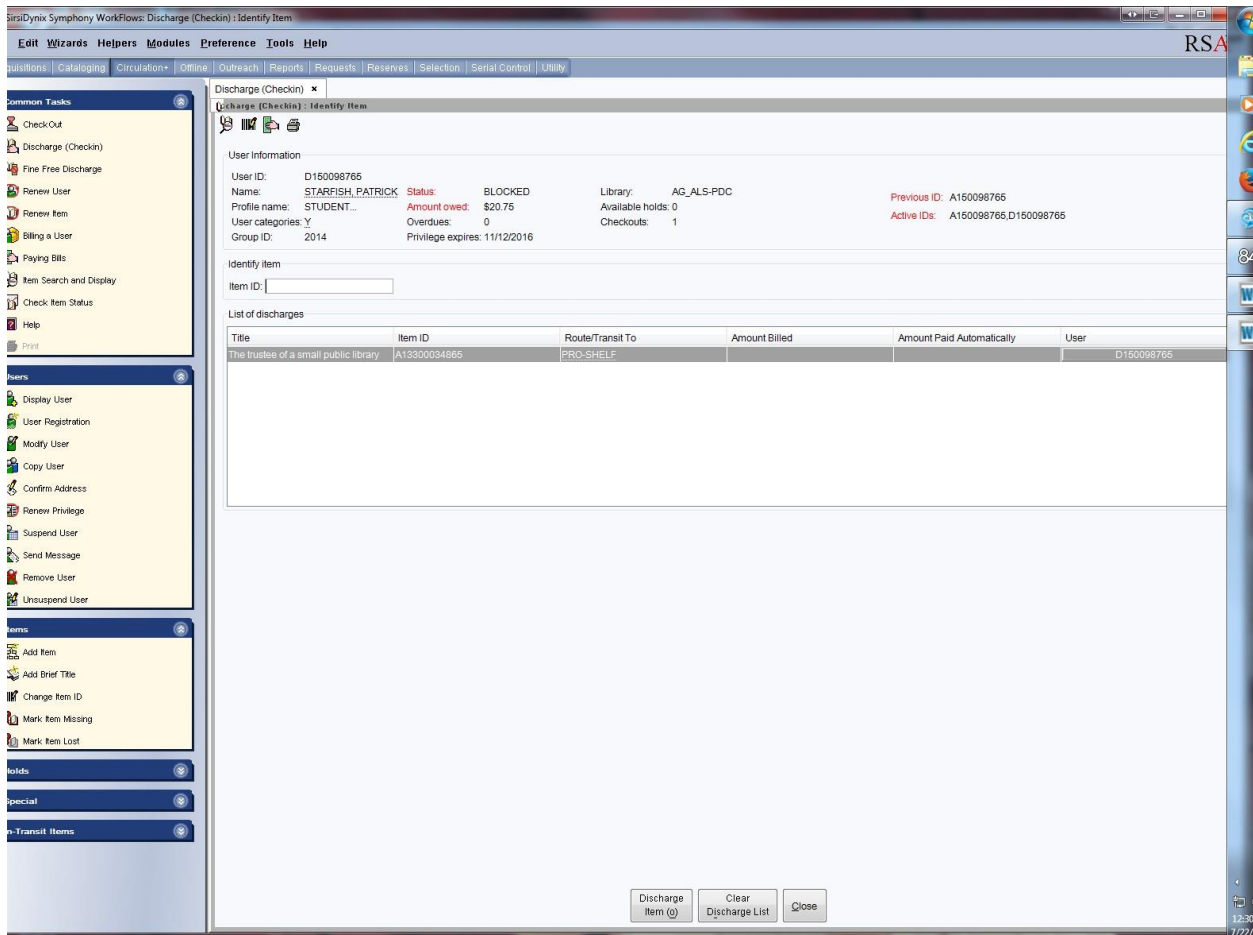
10. Open the” Discharge” wizard and discharge the item to be withdrawn.

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- 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:

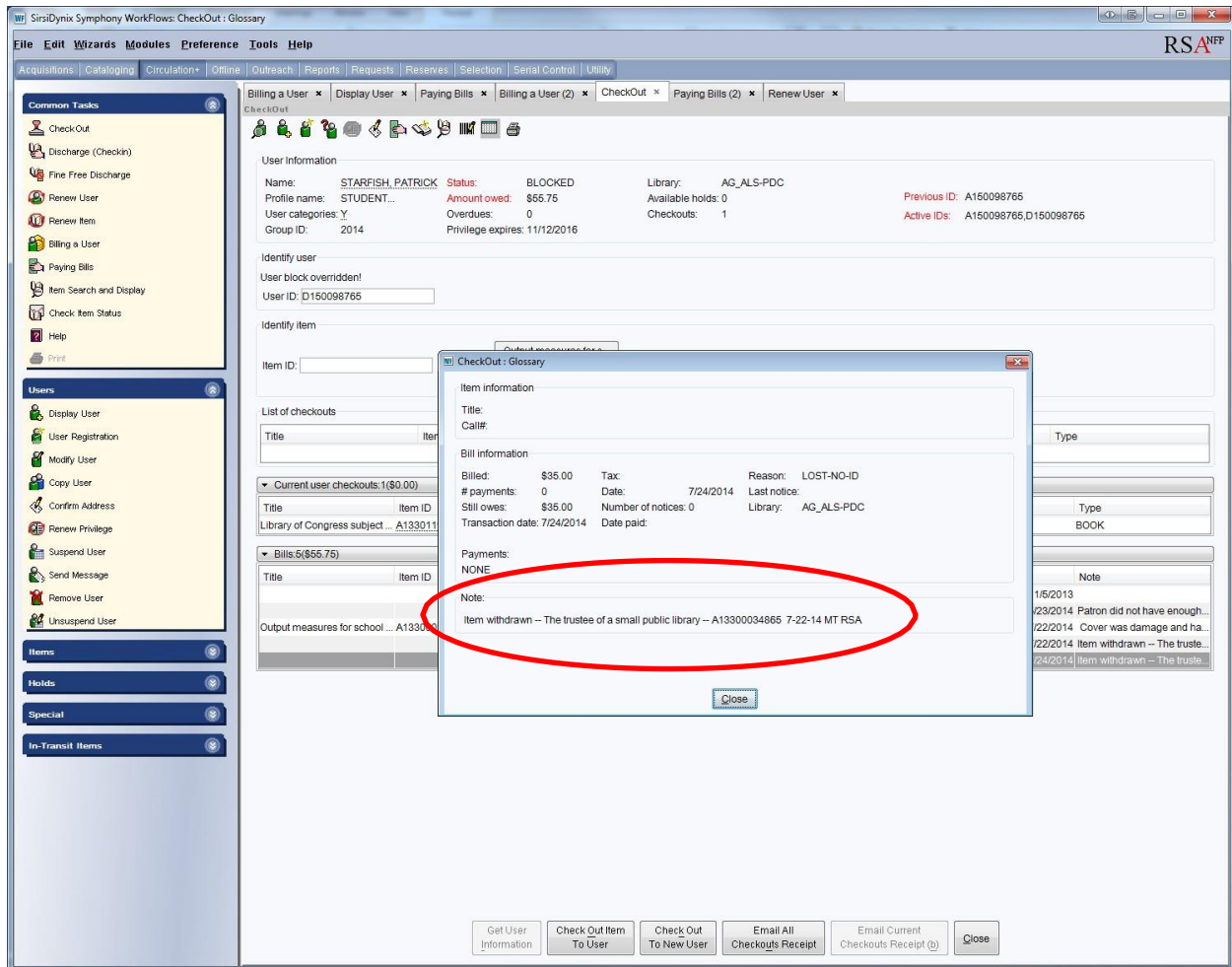
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The screenshot shows the SirsiDynix Symphony WorkFlows: CheckOut interface. The main window displays user information for STARFISH, PATRICK, who is blocked and owes \$55.75. Below this, there are sections for 'Identify user', 'Identify item', and 'List of checkouts'. A 'Bills' window is open, showing a table of items owed with columns for Title, Item ID, Reason, Owes, Billed, Date, and Note. The 'Bills' window shows two items: 'Library of Congress subject...' and 'Output measures for school...'. The 'Output measures for school...' item has a billed amount of \$35.00, which is underlined in the original image.

Title	Item ID	Reason	Owes	Billed	Date	Note
Library of Congress subject ...	A13301196490					
Output measures for school ...	A1330027410	LOST-NO-ID	\$11.25	\$11.25	7/22/2014	Item withdrawn - The trustee...
		LOST-NO-ID	\$35.00	\$35.00	7/24/2014	Item withdrawn - The trustee...

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.

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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