



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

Last updated: May 16, 2025

There is a video to accompany this guide which can be found here:
<https://www.youtube.com/watch?v=38x3vJn96yl>.

This is only to be used if the item record is being deleted. It is not to charge a patron for a book that is currently checked out.

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 DOESN’T include the title and item ID, though this information should be included in the Note field. Create the LOST-NO-ID bill BEFORE discharging and deleting the item from the database (or checking out to DISCARD) The patron’s user account will retain the item information in the bill note.

Billing a User wizard

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 date then one of these two options:
 1. Item withdrawn/lost
 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 Processing fee for item withdrawn (If entering processing fee separately)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 Include title of item being withdrawn from the RSA database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 Include the ID (barcode) of the item being withdrawn from the RSA database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 staff initials
- v. Add the name of the library entering the note
- vi. Example:
5.13.25 LOST ITEM FROM 5.1.2012 Serial killer games
(A66702753993) WDL MAIN/SN

Common Tasks

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

Users

Items

Holds

Special

In-Transit Items

Billing a User

User Information

Name:	NASLUND, JAMES	Status:	OK	Library:	AG_ALS-PDC
Profile name:	ADULT...	Amount owed:	\$0.00	Available holds:	0
User categories:	Y	Overdues:	0		
Group ID:		Privilege expires:	11/9/2025		

Identify User

User ID: SNDEMO3

Enter Item & Bill Information

Reason for bill: LOST-NO-ID

Amount: 25.00

Item ID:

Note: 5.13.25 Lost item from 2012 d

Payment type: CASH

List of Bills

Title	Item ID	Reason	Billed

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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User Information

Name: NASLUND, JAMES

Profile name: ADULT...

User categories: Y

Group ID:

Status: BLOCKED

Amount owed: \$25.00

Overdues: 0

Privilege expires: 11/9/2025

Library: AG_ALS-PDC

Available holds: 0

Identify User

User ID:

Street: 40 NAUGHTY CAT LN

City, state: MEOWINGTON IL

Zip: 48169

Phone: 309-435-5228

Email: CATNIPADDICT@KITTY.COM

Enter Item & Bill Information

Reason for bill:

Amount:

Item ID:

Note:

Payment type:

List of Bills

Title	Item ID	Reason	Billed	Bill Status	Note
		LOST-NO-ID		\$25.00 Billed	5.13.25 Lost item from 2012 d

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. This will remove the original lost bill from the patron’s account.

The item is now discharged 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
- 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:

11. 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.
12. Click on the amount billed in the “Owes” column of the “Bills” display window.

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WinSisDynix Symphony Workflows: CheckOut : Glossary

File Edit Wizards Modules Preference Tools Help

Acquisitions Cataloging Circulation+ Online Outreach Reports Requests Reserves Selection Serial Control Utility

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

Users

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

Items

- Holds
- Special
- In-Transit Items

Billing a User x Display User x Paying Bills x Billing a User (2) x CheckOut x Paying Bills (2) x Renew User x

CheckOut

User Information

Name: STARFISH, PATRICK Status: BLOCKED Library: AG_ALS-PDC Previous ID: A150098765
Profile name: STUDENT... Amount owed: \$55.75 Available holds: 0 Active IDs: A150098765, D150098765
User categories: Y Overdues: 0 Checkouts: 1
Group ID: 2014 Privilege expires: 11/12/2016

Identify user

User block overridden!
User ID: D150098765

Identify item

Item ID:

List of checkouts

Title Item

Current user checkouts: 1 (\$0.00)

Title	Item ID
Library of Congress subject ... A133011	

Bills: 5 (\$55.75)

Title	Item ID
Output measures for school ... A133011	

CheckOut : Glossary

Item information

Title:
Call#:

Bill information

Billed: \$35.00 Tax: Reason: LOST-NO-ID
payments: 0 Date: 7/24/2014 Last notice:
Still owes: \$35.00 Number of notices: 0 Library: AG_ALS-PDC
Transaction date: 7/24/2014 Date paid:

Payments:
NONE

Note:
Item withdrawn -- The trustee of a small public library -- A13300034865 7-22-14 MT RSA

Close

Get User Information Check Out Item To User Check Out To New User Email All Checkouts Receipt Email Current Checkouts Receipt (b) Close

Questions? Contact the RSA Help Desk at help@rsanfp.org or by phone at 866-940-4083