Resource Sharing Alliance
715 Sabrina Drive
East Peoria, IL 61611
866-940-4083

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=38x3vJn96yI.

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

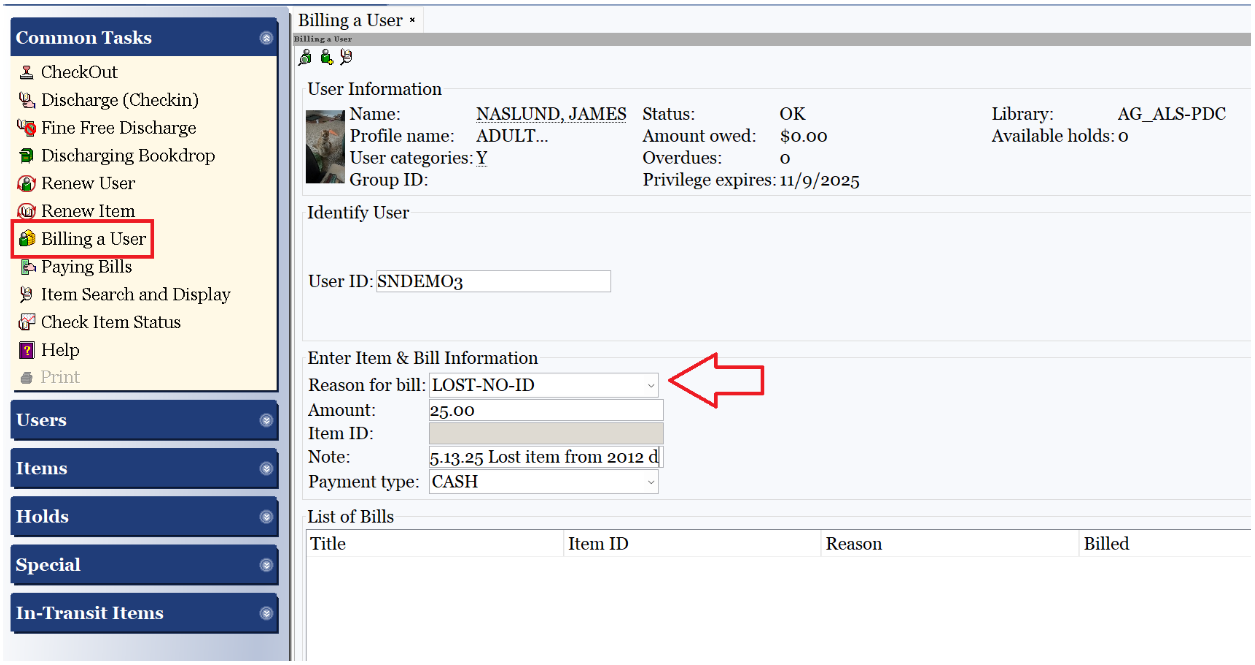
1. Open the "Billing a User" wizard located in the "Common Tasks" group.
2. Scan the patron's ID into the User ID box or search for the patron using the User Search helper.
3. Reason for bill:
    - Select "LOST-NO-ID."
4. Amount:
    - Enter the replacement cost of the lost item. If your library charges 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 Item withdrawn/lost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 Processing fee for item withdrawn (If entering processing fee separately)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 Include title of item being withdrawn from the RSA database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 Include the ID (barcode) of the item being withdrawn from the RSA database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

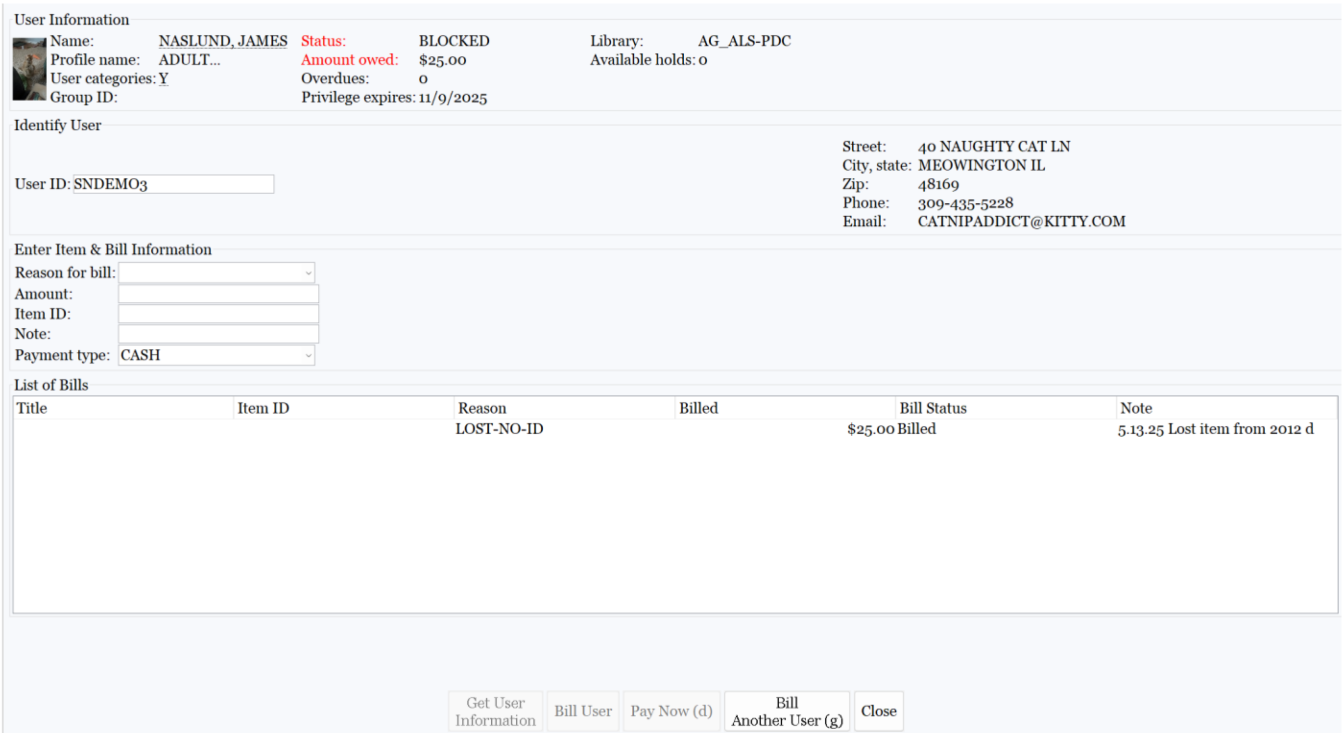
v. Add the name of the library entering the note

vi. Example:

5.13.25 LOST ITEM FROM 5.1.2012 Serial killer games (A66702753993) WDL MAIN/SN



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.



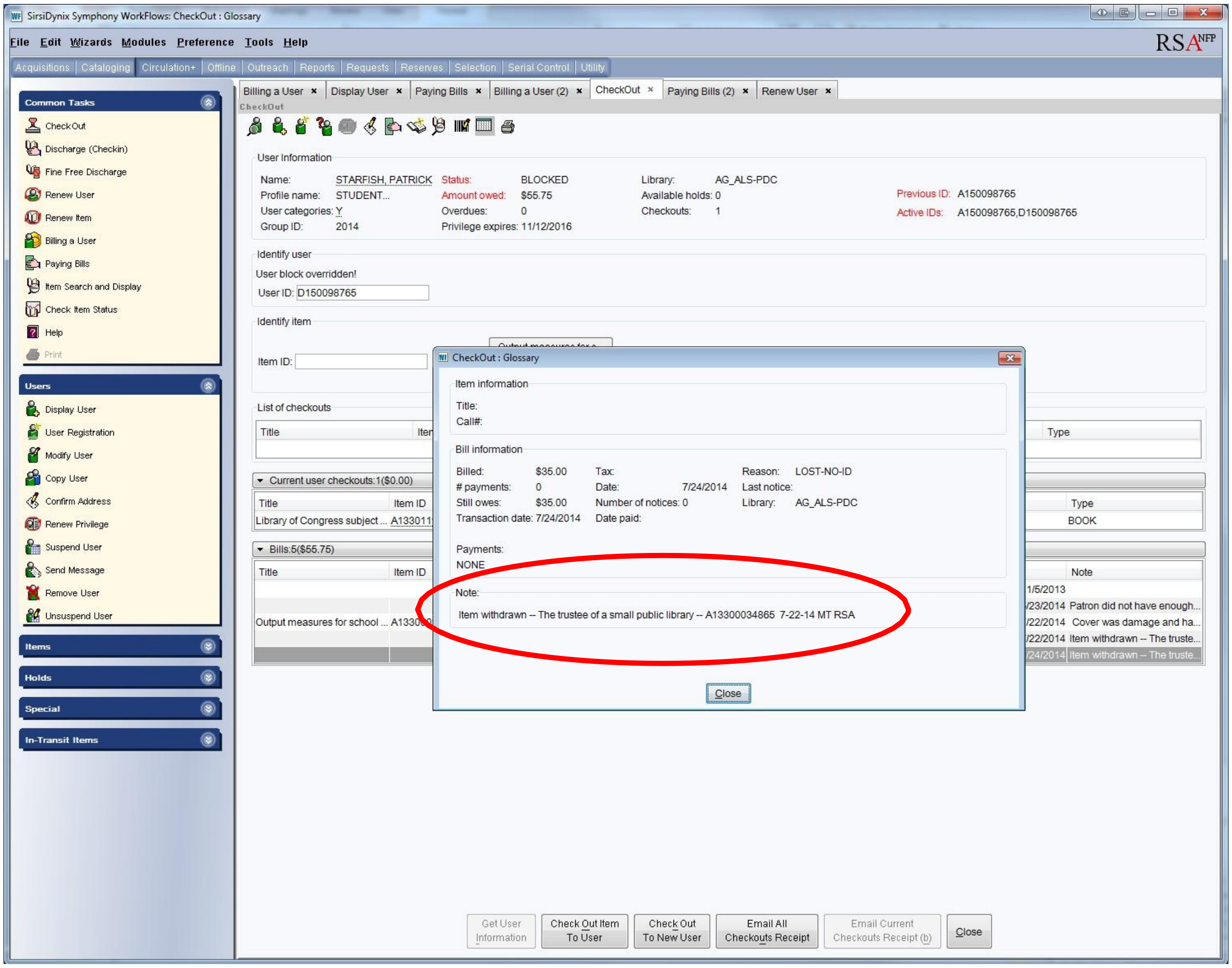
9. Click the "Close" button on bottom of screen.
10. Open the" Discharge" wizard and discharge the item to be withdrawn. This will remove the original lost bill from the patron's account.

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 <u>underlined</u> in WorkFlows the <u>underlined text</u> 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.



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