



Bill Notes Guide

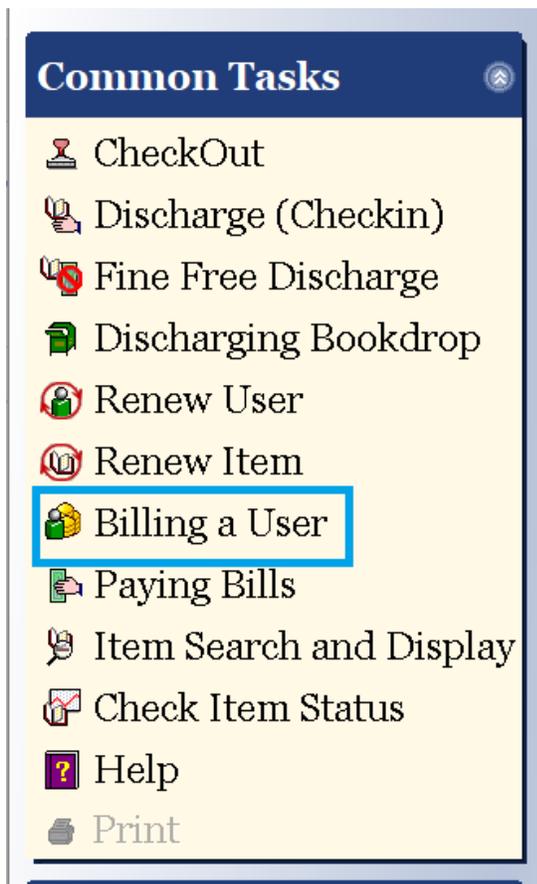
Last updated: June 10, 2025

Bill notes can be added during the creation of a new bill in the Bill a User wizard.

When creating a bill note follow the [RSA Patron Notes Policy](#) and add the following to the note:

- Date the note was created
- Initials of staff member creating the note
- Name of library entering the note

Open the “Billing a User” wizard located in the “Common Tasks” group.



1. Scan the patron’s ID into the “User ID” box or search for the patron using the User Search helper.
2. Select a bill reason:
 - a. This is not to bill the replacement cost of an item currently checked out on a patron’s account. For that, please see the [Mark Item Lost Wizard Guide](#).
 - b. Contact RSA if you want to add or remove any bill reasons from this drop-down menu.
3. Enter an amount for the bill.
4. Item ID:

This should only be used for partial damage on items that are still circulating.

 - a. If the bill reason is associated with an item, enter the item ID
 - i. If the item ID is keyed in staff can immediately enter a bill note in the “Note” box.
 - ii. If the item ID is scanned, WF completes the billing process as soon as it scans the Item ID.
 - iii. This like Copies or MISC don’t require an item ID, and the box will be greyed out.
5. Make sure you put the date, staff initials and library name in the note.
6. Payment type:
 - a. For immediate payment:
 - i. Select a payment type from the drop-down menu.
 - ii. Click the “Pay Now” button on the bottom of the screen; this will bill the patron and pay the bill simultaneously.
 - b. For future payment:
 - i. Payment type can remain “CASH.”
 - ii. Click the “Bill User” button on the bottom of the screen.

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 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: MISC
 Amount: \$5.00
 Item ID: (greyed out)
 Note: 6.9.25 SN/RSA PATRON RET
 Payment type: CASH

List of Bills

Title	Item ID	Reason	Billed	Bill Status	N

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

Viewing a billing note:

In the Display User wizard, left click on the amount billed in the “Owes” column in the Bills display window. The dollar amount is underlined. Anytime text is underlined in WorkFlows the underlined text can be clicked and more information displays.

The screenshot shows a user profile for NASLUND, JAMES with ID SNDEMO3. Below the profile is a table of unpaid bills. The first row in the table has the following data: Title, Item ID, Reason (MISC), Owes (\$5.00), Billed (\$5.00), Date (6/9/2025), Payment library (AG_ALS-PDC), and Note (6.9.25 SN/RSA PATRON...). A blue arrow points to the underlined '\$5.00' in the 'Owes' column.

Title	Item ID	Reason	Owes	Billed	Date	Payment library	Note
		MISC	<u>\$5.00</u>	\$5.00	6/9/2025	AG_ALS-PDC	6.9.25 SN/RSA PATRON...

This will tell you the reason for the bill, display the full bill note, show the date the bill was added and what library added the bill.

The 'Display User: Glossary' window displays the following information:

- Item information:** Title, Call#
- Bill information:** Billed: \$5.00, Tax, Reason: MISC, # payments: 0, Date: 6/9/2025, Last notice, Still owes: \$5.00, Number of notices: 0, Library: AG_ALS-PDC, Transaction date: 6/9/2025, Date paid
- Payments:** NONE
- Note:** 6.9.25 SN/RSA PATRON RETURNED DVD CASE WITH BITE MARKS. CASE REPLACED.

A 'Close' button is located at the bottom of the window.

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