



Adding Bills and Bill Notes before Removing Lost Items Procedure

Last updated: September 25, 2025

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

Use this procedure when you are removing an item from WorkFlows that has an unpaid bill that you want to retain on a patron's account. 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.

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

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 (using LOST-NO-ID as a bill reason) 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:
 - IMPORTANT: Enter a note to clarify the reason for the bill.
 - Include date of note, "item withdrawn", date of bill, title, barcode, staff initials and library
 - Example:
5.13.25 LOST ITEM FROM 5.1.2012 Serial killer games
(A66702753993) WDL MAIN/SN

Billing a User *

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

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”.
- Select “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 The List of Bills display window will now include the information for the item being withdrawn.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.

User Information

Name: NASLUND, JAMES Status: BLOCKED Library: AG_ALS-PDC
 Profile name: ADULT... Amount owed: \$25.00 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:
 Amount:
 Item ID:
 Note:
 Payment type: CASH

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. Select “Close.”

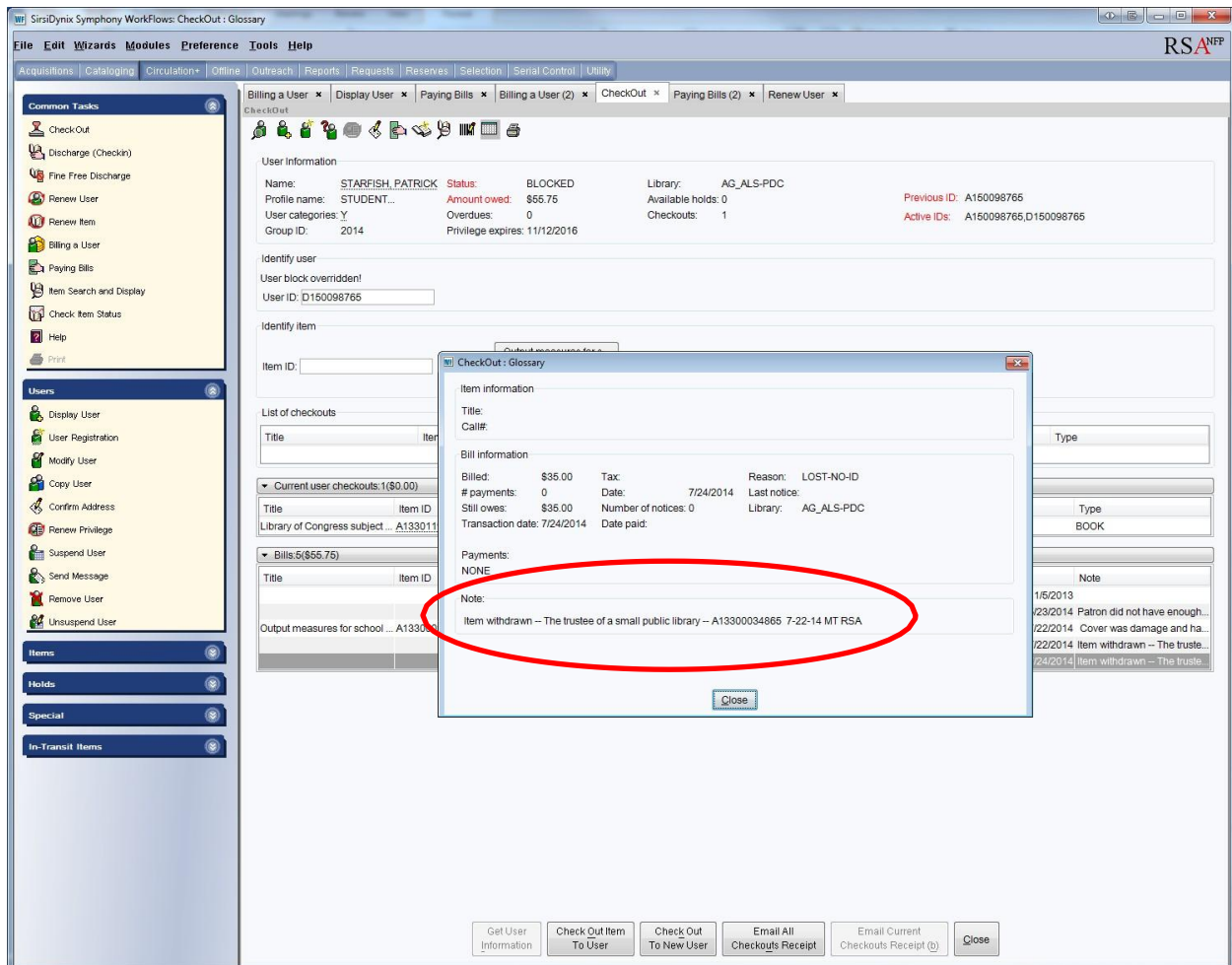
10. IMPORTANT: Use the Discharge wizard and discharge the item to be withdrawn. This will remove the original lost bill from the patron’s account.

The item is now discharged and can be deleted from the RSA database by:

- Checking the item out to your library’s Discard user
OR
- Deleting the item using “Delete Title, Call Numbers or Items”

To view the complete note:

- The dollar amount is underlined. The text underlined in WorkFlows will display more information. This is called a glossary.
- Left 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