



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

Last updated: July 7, 2026

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

<https://www.youtube.com/watch?v=HPjDqZ5uw5M>.

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 - Include date of note, "item withdrawn", date of bill, title, barcode, staff initials and library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

Common Tasks
[CheckOut](#)
[Discharge \(Checkin\)](#)
[Fine Free Discharge](#)
[Discharging Bookdrop](#)
[Renew User](#)
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Users
Items
Holds
Special

Billing a User *

User Information
Name: NASLUND, JAMES
Profile name: ADULT...
User categories: Y
Group ID:

Status: OK
Amount owed: \$0.00
Overdues: 0
Privilege expires: 11/9/2025

Library: AG_ALS-PDC
Available holds: 0

Identify User

User ID:

Enter Item & Bill Information
Reason for bill:
Amount:
Item ID:
Note:
Payment type:

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 The List of Bills display window will now include the information for the item being withdrawn.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

The screenshot displays the SirsiDynix Symphony WorkFlows: CheckOut: Glossary interface. The main window shows user information for STARFISH, PATRICK, who is BLOCKED. The amount owed is \$55.75. A modal window titled 'CheckOut: Glossary' is open, showing item information and a note: 'Item withdrawn - The trustee of a small public library - A13300034865 7-22-14 MT RSA'. The note is circled in red.

User Information:

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

Identify user:

User block overridden!
User ID: D150098765

Identify item:

Item ID: []

List of checkouts:

Title	Item ID
Library of Congress subject ...	A133011

Current user checkouts: 1 (\$0.00)

Title	Item ID
Library of Congress subject ...	A133011

Bills: 5 (\$55.75)

Title	Item ID
Library of Congress subject ...	A133011

Output measures for school ... A133011

CheckOut: Glossary

Item information:

Title:	Call#:
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Bill information:

Billed:	\$35.00	Tax:	7/24/2014	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:

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

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