

Section 7 Fines and Financial transactions

A. HOW TO APPLY A MANUAL INVOICE TO A PATRON RECORD

Go to the patron record.

- Click the Patron Accounting link on the left menu bar.
- In the Patron Accounting/Current Fees and Payments screen, click the “Add Fee / Invoice” button.

You will see this pop-up.

The screenshot shows a web interface for 'Patron Accounting'. In the background, there is a summary of the patron's account: 'Balance: \$0.00', 'Accruing overdues: 0.00', and 'Outstanding charges: 0.00'. Below this are buttons for 'Add Credit' and 'Add Fee/Invoice'. The 'Add Fee/Invoice' button is highlighted, and a modal window titled 'Add Manual Invoice' is open in the foreground. This modal window contains four input fields: 'Fee type' (a dropdown menu), 'Item Barcode', 'Description', and 'Amount'. At the bottom of the modal are two buttons: 'Charge patron \$NaN' and 'Cancel'.

Fee Type. (Required) Click the arrow for the pull-down menu and select the type of fee you want to apply.

Item barcode. (Required for Lost and Damaged items) Some libraries prefer to add **Enter** the item barcode for manually charged Lost items or Damaged items to track payments.

Description. (Required) Enter a description of the charge. REMEMBER to add your library's code and your initials. For example "Charging for missing booklet. tp/SCA."

Amount. (Required) Enter the amount the patron is to be charged.

- Click the “Charge patron” button to apply the charge to the record.
- Confirm the charge has been applied to the patron's record and displays in their “Current Fees and Payments” screen.

Section 8 Problem Item statuses and workflows

A. DAMAGED STATUS AND WORKFLOW

If you receive a damaged item in returns to your library or in-transit to fill a hold, see part G. FILLING OUT THE PROBLEM ITEM FORM. Do NOT Check In the item!

Use the DAMAGE/DEFECT REPORTED scenarios in Part I to help you decide which workflow to use.

If your library owns an item that has been damaged and you want to charge a patron for that item AND you already have the Problem Item form filled out completely

1. Check in the item.
2. Enter the barcode in the “search the catalog” tab and go to the Item Status page for that barcode.
3. Under the Circ Status header, choose the drop down menu next to “Damaged status:” and choose “Damaged”.
4. Follow your local library procedure to charge the patron.
5. Apply a Manual Invoice to the patron record for the amount you want to charge for the damaged item:

Go to the patron record.

- Click the Patron Accounting link on the left menu bar.
- In the Patron Accounting/Current Fees and Payments screen, click the “Add Fee / Invoice” button.

You will see this pop-up.

The image shows a screenshot of a library system interface. In the background, there is a 'Patron Accounting' screen with a balance of \$0.00 and options to 'Add Credit' or 'Add Fee/Invoice'. A 'Current Fees and Payment' section shows 'No transactions to show!'. Overlaid on this is a 'Add Manual Invoice' pop-up window. This window contains four input fields: 'Fee type:' (a dropdown menu), 'Item Barcode:', 'Description:', and 'Amount:'. At the bottom of the pop-up are two buttons: 'Charge patron \$NaN' and 'Cancel'.

Fee Type. (Required) Click the arrow for the pull-down menu and select the Damaged Fee Type. type of fee you want to apply.

Item barcode. (Required) Enter the item barcode in this field so that the record will automatically record the item’s title and Owning Library. Some libraries prefer to add the item barcode for manually charged Lost items or Damaged items to track payments.

Description. (Required) Enter additional information about a description of the charge. You will no longer need to add the barcode, title or owning library in this field as adding the item barcode will track

this information (unless your library has already deleted the item record). REMEMBER to add your library's code and your initials. For example, "Item returned severely water damaged. Patron may have book after payment. Library will hold item for 3 months for patron. tp/SCA."

Amount. (Required) Enter the amount the patron is to be charged.

- Click the "Charge patron" button to apply the charge to the record.
- Confirm the charge has been applied to the patron's record and displays in their "Current Fees and Payments" screen.

DO NOT MARK AN ITEM DAMAGED IF IT IS CURRENTLY CHECKED OUT OR IF YOUR LIBRARY DOES NOT OWN THE ITEM!!!!