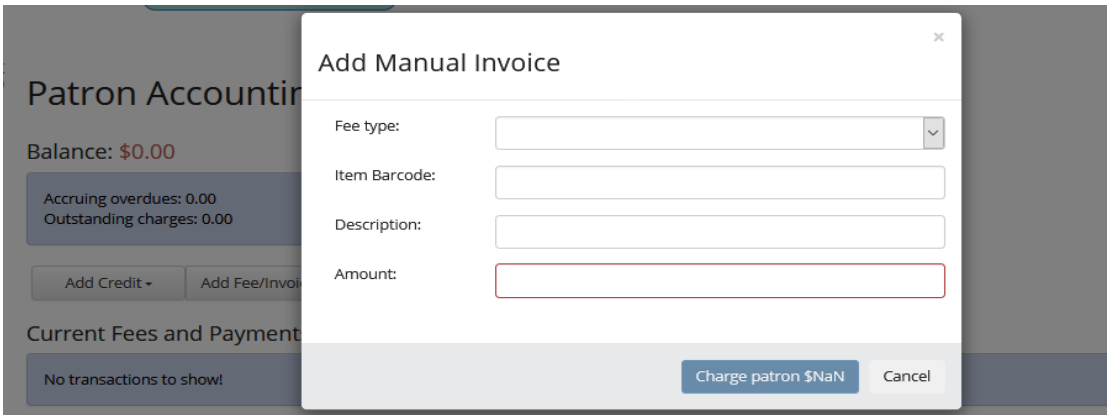
Section 7 Fines and Financial transactions

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.



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.

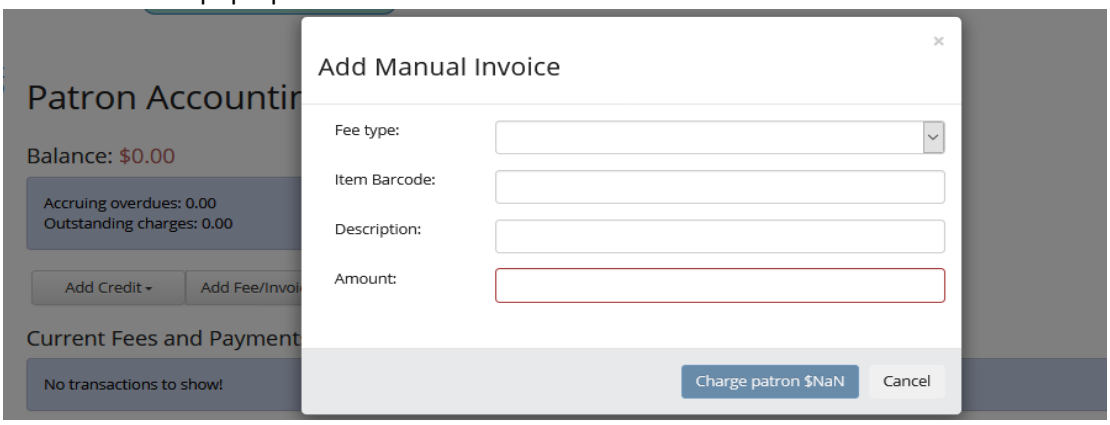
If your library owns an item that has been damaged and you want to charge a patron for that item AND you already have the Problem Item form filled out completely

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.



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 severly 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!!!!