

Workflows Tip of the Week



Module: Circulation

Summary: Recommended workflow for forgiving fines on discard items.

Note: This document is just a suggestion and is not required.

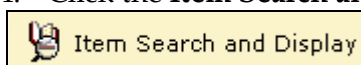
Instructions:

1. Open your **Discard Patron** using the **Display User** wizard
2. Under the **Checkouts** tab, click the underlined Id for the item number you wish to clear. This will open the item glossary.

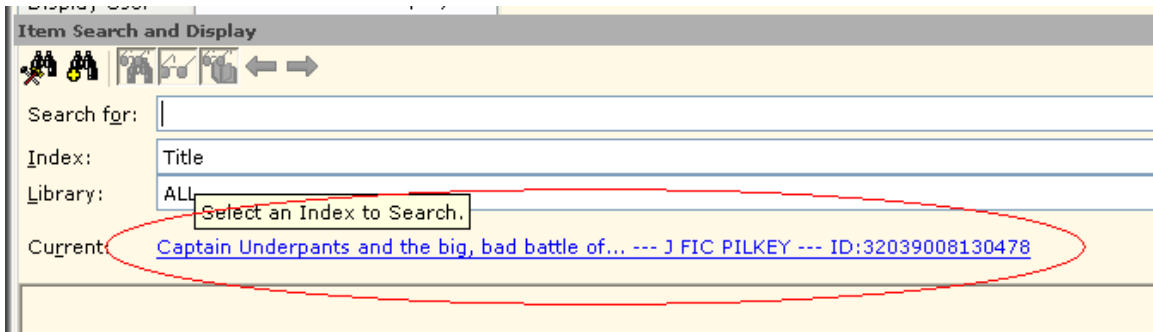
The screenshot shows a web interface with a navigation bar containing tabs: Summary, Addresses, Extended Info, Bills, and Checkouts. The Checkouts tab is active and displays 'Checkouts:19(\$0.00)'. Below this is a table with columns for Title, Item ID, and Date. The Item ID '32039008130478' for 'Captain Underpants (an...)' is circled in red.

Title	Item ID	Date
Aquaculture: farming i...	<u>32039003771011</u>	
Captain Underpants (an...	<u>32039008130478</u>	
Signs, letters, words : ...	<u>32039001429422</u>	
Hellboy. Seed of destr...	32039008519258	
Stagestruck : a Peter ...	32039009059122	
The silent girl : a Rizzo...	32039009166570	

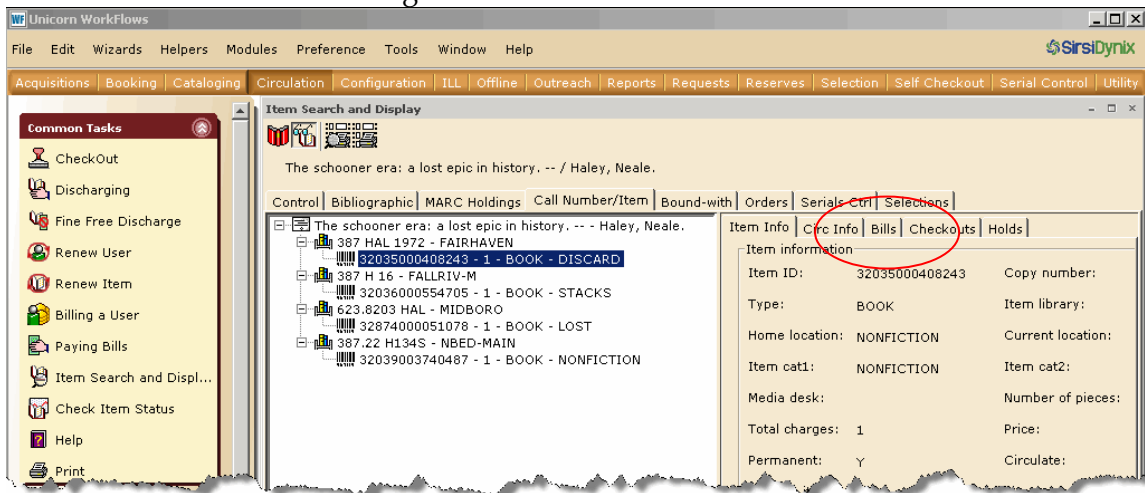
3. After the glossary pops up, close it.
4. Click the **Item Search and Display** wizard.



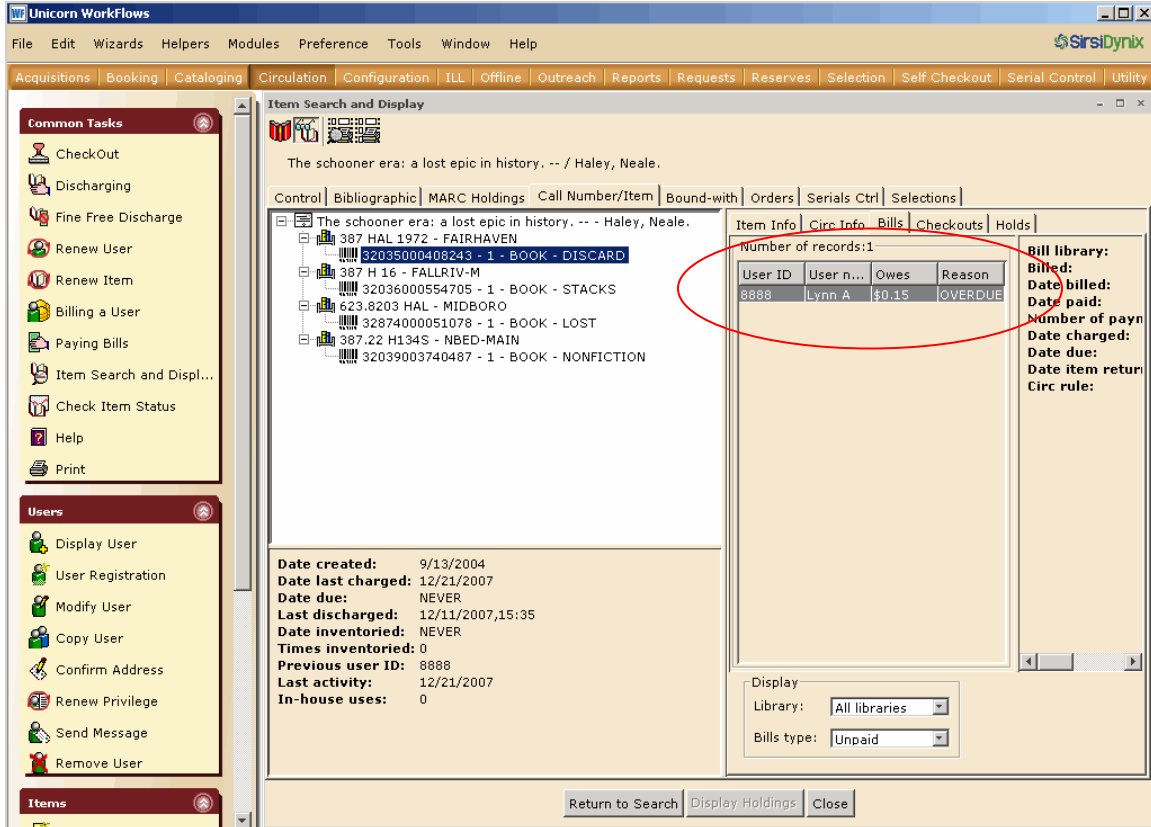
- You should now see a link to the item under the search area to the **Current** item. Click the text to go into the item record.



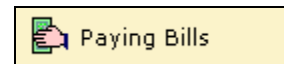
- Click the **Call Number/Item** tab.
- Click the **Bills** tab on the right side of the screen.



The following screen appears:



8. Click the first patron, then click the **Paying Bills** wizard.



9. Forgive the fine and click **Close**. (To select Forgiven as a Payment Type, click in the **Payment Type** field to get the drop-down list.)

The Item Search and Display wizard appears and displays any remaining patrons with fines.

10. Repeat steps 8 and 9 as needed.

If you want to replace the bill on the patron's account, rather than forgive it, you can follow these steps:

*note – you may want to replace a bill before it has been cleared to avoid any confusion

1. Open the patron's account who's bill was just cleared, or needs to be cleared, using the **Billing A User** wizard
2. Using the drop down menu, select a bill reason of **DLOST** for a discarded lost item, or **DOVERDUE** for a discarded item with overdue fines
3. Enter the dollar amount in the **Amount** field
4. Click the **Bill User** button
5. Repeat steps 1-5 for all bills being replaced in this manner.