



## **List Items with Bills and List Users with Billed Items Reports**

As libraries no longer receive copies of their patron's bills, SWAN has created two report templates for each library so that staff can generate lists of billed items and/or users with bills. When accessing these reports, please make certain you log in to WorkFlows using the CIRCSR login for your library. Both report templates have already been configured. You should not have to edit the templates, with the possible exception of "Date billed" range. If you want to adjust the report output, do this in the Print User tab.

### **List Items with Bills:**

This report will generate a list of items owned by your library that are either at least 42 days late and marked LOST by the Assumed Lost report or have been manually marked LOST by staff.

- Bill Selection tab – Date billed
  - The template was configured to find bills generated after 4/23/2015, excluding migrated bills and updates performed by our data loader. In the future, if you run this report monthly, you may want to select a monthly range.
- All other tabs are already configured, including output. If you want to see a different output, you can choose other settings in the Print Item tab.
- Once you have made any changes, you can click on "Run Now".

### **For List Users with Billed Items:**

This report will generate a list of users belonging to your library that have been billed for items. These items are either at least 42 days late and marked LOST by the Assumed Lost report or have been manually marked LOST by staff.

- Bill Selection tab – Date billed
  - The template was configured to find bills generated after 4/23/2015, excluding migrated bills and updates performed by our data loader. In the future, if you run this report monthly, you may want to select a monthly range.
- All other tabs are already configured, including output. If you want to see a different output, you can choose other settings in the Print User tab.
- Once you have made any changes, you can click on "Run Now."

### **Billing**

Because of the various ways that users can receive a bill (SMS Texting, Email, SVA robo-calling, and printed copies through US mail), staff will no longer receive printed copies of bills for their patrons or items. Therefore, the two reports above will be the primary tools for identifying lost copies for collection development (Items with Bills Report) or for any additional optional procedures your library would like to use to remind your patrons that have items 42 days past due (Users with Billed Items Report).

List Items with Bills Report – This report will list your items that are over 42 days past due. Follow your in house procedures for processing items on this report. This list is not to be used for billing the patron.

List Users with Billed Items Report – This report will list your users that have checked out items that are over 42 days past due. It is the patron's home library that is responsible for following up with their patron to have the item returned or the patron billed for the item. ONLY the patron's home library will bill a user for material not returned.

#### Member Services Billing:

As has been the procedure for years, billing for lost materials between SWAN libraries is performed by SWAN on a quarterly basis. Also on a quarterly basis, libraries are credited for items that were paid for at another SWAN library. These procedures have not changed when we migrated to SirsiDynix. The next quarterly billing will be in July.

#### Sample List Items with Bills report:

Item list singly with author, title, call number, and copy information.

```
Personal Author: Greene, Robert.  
Title: The 48 laws of power / Robert Greene.  
303.3 GRE  
copy:1 id:31804002199063 library:ADS  
location:LOST-ASSUM
```

```
Personal Author: Funk, Charles Earle, 1881-1957.  
Title: 2107 curious word origins, sayings & expressions from  
white elephants to a song & dance /  
Charles Earle Funk ; drawings by Tom Funk.  
422 FUN  
copy:1 id:31804002020780 library:ADS  
location:LOST-ASSUM
```

## Sample List Users with Billed Items report:

Bills will list organized by user ID.

There will be three separate entries per item: item bill, processing fee, and charge information.

```
LAST NAME, FIRST
id: USER ID

*Bills:4
612.399 DOWD                                copy:1
  The vitamin D cure / James Dowd, Diane Stafford.
  Dowd, James, 1962-
  amount billed:$25.00      bill reason:LOST      date
billed:5/5/2015
  balance:$25.00      billed by:ADS      date
paid:NEVER

612.399 DOWD                                copy:1      OLS
  The vitamin D cure / James Dowd, Diane Stafford.
  Dowd, James, 1962-
  amount billed:$5.00      bill reason:PROCESSFEE  date
billed:5/5/2015
  balance:$5.00      billed by:ADS      date
paid:NEVER

*Charges:2

612.399 DOWD                                copy:1
OLS
  The vitamin D cure / James Dowd, Diane Stafford.
  Dowd, James, 1962-
  charged:2/21/2015,0:00      due:3/7/2015,23:59
price:$25.00
```

Annotations in the report:

- Patron's home library** points to `library:ADS`
- Item owner** points to `OLS`
- Charging library** points to `billed by:ADS`

If you should have any questions, please contact Member Services at 630-734-5153 or send an email to [help@swanlibraries.net](mailto:help@swanlibraries.net).