

How to Collect Bills that Migrated from III with a status of Replacement/Billed

Any item that migrated from III with a status of Replacement/Billed will appear under the checkouts tab of the user record with a status of Overdue. A bill will list for this item in the Bills tab of the user record with a Reason of REPLACE. **REPLACE is a red flag that this is a migrated bill.**

| | | | | • | | | | | | | |
|------|-------------|------|-------------------|------------|----------------|-----------|-------------|-----------------------|-------|---------------|--------|
| Chec | k Out (0 |)) | Checked-Out It | tems(4) | Holds(0) | Fines(\$ | 90.00) | Check In (0) | Link | ed Patrons(0) | |
| | <u>R</u> en | ew | <u>C</u> laim Ret | turned | <u>M</u> ark L | ost Items | Cha | ange <u>D</u> ue Date | All | | • |
| All | # | | Barcode | Call Nu | n Lo | cation | | Title | | Due Date | Status |
| | 1 | 311: | 39002646940 | 792.23/CAF | R/PB pfs | Sta | nd-up co | medy : the boo | k / J | 09-08-2007 | BILLED |
| | 2 | 311: | 39003360285 | 792.028/PR | A/ pfs | A F | Practical I | handbook for t | ne ac | 09-13-2007 | BILLED |
| | 3 | 311: | 39002784360 | 792.2308N | VAT pfs | On | the real s | side : laughing, | lying | 09-13-2007 | BILLED |
| | 4 | 311: | 39004413497 | 792.702 I | pfs | l ki | lled : true | stories of the | road | 09-13-2007 | BILLED |

Checked-Out Items tab of a patron record in III:

Fines tab of a patron record in III:

| Chec | k Out (0) Checked-Out Items | (4) Holds(0) Fines(\$90.00) Check In (0) Linke | d Patrons(0 |)) |
|--------|-----------------------------|--|-------------|----------------------|
| Total: | : \$90.00 | Collect Money Waive Charges Add Charge | e | Fines <u>P</u> aid |
| Amou | int selected: \$0.00 | | | Patro <u>n</u> Notes |
| All | Status | Title | Location | Amount |
| | Replacement | Stand-up comedy : the book / Judy Carter. | pfs | \$20.00 |
| | MANUAL | SERVICE CHARGE FOR BILLED ITEM 10-22-07 | pfs | \$3.00 |
| | Replacement | A Practical handbook for the actor / Melissa Bruder [| pfs | \$6.00 |
| | Replacement | On the real side : laughing, lying, and signifying : the u | pfs | \$28.00 |
| | Replacement | I killed : true stories of the road from America's top co | pfs | \$24.00 |

Checkouts tab of a user record in Symphony:

| Checkouts | Holds | Routings | Bookings | Suspension | Charge | History | User Groups |
|-----------------|----------------|-------------|----------------|----------------|---------------|---------|-------------|
| Checkouts:4(\$1 | 6.80) | | | · | | | · · |
| Title | Call number | Item ID | Date Charged | Date Due | Recall Date D | Status | Туре |
| Stand-up com | .792.23/CAR/PB | 31139002646 | 9/8/2007,0:00 | 9/8/2007,23:59 | | Overdue | BOOK |
| A Practical ha | 792.028/PRA/ | 31139003360 | 9/13/2007,0:00 | 9/13/2007,23 | | Overdue | BOOK |
| On the real si | 792.2308/WAT | 31139002784 | 9/13/2007,0:00 | 9/13/2007,23 | | Overdue | BOOK |
| I killed : true | 792.702 I | 31139004413 | 9/13/2007,0:00 | 9/13/2007,23 | | Overdue | BOOK |

Bills tab of a user record in Symphony:

Unpaid bills:6(\$90.00)

| | Summary | Addresses | Extended Info | |
|--|---------|-----------|---------------|--|
|--|---------|-----------|---------------|--|

If the bill reason is **REPLACE** and the Date is before 4/14/15, this is a migrated bill.

| Title | Item ID | Reason | Owes | Billed | Date | Payment library |
|-------------------------|----------------|---------|---------|---------|------------|-----------------|
| Stand-up comedy : t | 31139002646940 | REPLACE | \$20.00 | \$20.00 | 10/20/2007 | |
| A Practical handbook | 31139003360285 | REPLACE | \$6.00 | \$6.00 | 10/26/2007 | |
| On the real side : lau | 31139002784360 | REPLACE | \$28.00 | \$28.00 | 10/26/2007 | |
| I killed : true stories | 31139004413497 | REPLACE | \$24.00 | \$24.00 | 10/26/2007 | |
| | | MANUALX | \$3.00 | \$3.00 | 10/22/2007 | |
| | | MANUALX | \$9.00 | \$9.00 | 10/29/2007 | |

These instructions assume that your patron is standing in front of you and is going to pay the bill in full at this time.

To pay this bill, you MUST:

1. Right-click on the item to be paid in the **Checkouts tab** of the user record and select Mark Item Lost. Alternatively, you can use Mark Item Lost wizard and Paying Bills wizard.

| Checkouts | Holds | Routings | | Bookings |
|----------------------------------|-----------------------------|----------------------|-----------|---------------------------------|
| Checkouts:4(\$1 | 6.80) | | | |
| Title | Call number | Item ID | | Date Charged [|
| Stand-up com | 792.23/CAR/ | PB 31139002 | блб | <u>0/8/2007 0.00 </u> |
| A Practical ha On the real si | 792.028/PRA/ 792.2308/WA | / 311390 T 311390 | Bil Ch | l User for Item ange Item ID |
| I killed : true | 792.702 I | 311390 | Ch | eckin |
| | | | Cla | aims Returned |
| | | | Dis | splay Holds |
| | | | Dis | splay Item |
| | | | Ed | it Item Note |
| | | | Ма | rk Item Lost |
| | | | Ma | rk Item Missing |
| | | | Ma | difu Dua Data |

2. In the subsequent screen, adjust bill if necessary and select a Payment Type. Click Pay Now.

| WF Display User : Billing for Lost Item/Processing Fee | × |
|--|---|
| Billing user User ID: 21139001217109 Alt ID: | |
| For lost item Item ID: 31139003360285 Title: A Practical handbook for the actor Author: Bruder, Melissa. Price: \$6.00 | |
| Billing info Amount Lost item: \$6.00 Processing fee: \$5.00 | • |
| Bill User Pay Now (b) Cancel Lost Item Bill | |

A confirmation screen will display. Click OK.

3. The item has been removed from the Checkouts tab. Click on the Bills tab. The LOST bill that you just created has been paid and will only display if you change the Bills Display Option from Unpaid to All or Paid.

| Display | options | | | | |
|----------|---------------|---|--------|--------|---|
| Library: | All libraries | • | Bills: | Unpaid | • |
| | | | | | |

However, the original bill (migrated) with a Reason of REPLACE remains as a bill on the user record. This bill must now be waived.

4. To waive this bill, right-click on the old, migrated bill and select Pay Bill. Alternatively, you can use the Paying Bills wizard.

| Summary | Addresses | Extend | ded Info | | | SMS N | otice Contact Ir | nfo | Bills |
|-------------------------|----------------|------------------------|------------|---------|----------------|---------|------------------|---------------|-------------|
| Unpaid bills:4(\$78.00 |) | | | | | | | | |
| Title | Item ID | Reason | Owes | | Billed | | Date | Payment libra | ry |
| Stand-up comedy : t | 31139002646940 | REPLACE | | \$20.00 | Ś | \$20.00 | 10/20/2007 | | |
| A Practical handbook | 31139003360285 | | | \$6.00 | | \$6.00 | 10/26/2007 | | |
| On the real side : lau | 31139002784360 | Change It | tem ID | \$28.00 | \$ | \$28.00 | 10/26/2007 | | |
| I killed : true stories | 31139004413497 | Display It | em | \$24.00 | \$ | \$24.00 | 10/26/2007 | , | |
| | | Edit Bill N | Note | | | | | | |
| | | Edit Hem | Note | | | | | | |
| | | Pay Dill Diace Hole | 1 | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | If you | enter pa | yment | info | | | | |
| Identify User | | here it | t will not | z apply | to this | | | | |
| User ID: 2113900 | 1217109 | bill | | | | | Ent | er amount o | of payme |
| 000.10.2110000 | 1217103 | | | | | | her | e to pay this | s bill only |
| Total bills and pay | ments | | K | | | | inci | e to puy this | |
| Total bills: 4 | Payme | nt: | | 1 | | | | | |
| Total owed: 47 | 9.00 Dayma | | |] | | | | | |
| Total Oweu: \$7 | o.oo Payme | in type: CASI | | | | • | | | |
| Still owes: \$7 | 8.00 Chang | e: | | | | | | | |
| Credit balance: no | ne | | | | | | | 1 | |
| Individual Bills and | Payments | | | | | | | • | |
| Title | Item ID | Reasor | 1 | Owes | | Pavr | ment Type | Pavm | nent |
| A Practical handbo | ok 3113900336 | 0285 REPLAC | `F | | \$6.0 | | GRATBILI | • 6.00 | |
| | NR 9119900990 | 0205 KEFLAC | | | - - | | | • 0.00 | |
| | | | | | | | Choose | | tuno of |
| | | | | | | | Choose | a payment | . type of |
| | | | | | | | MIGRA | I BILL and e | nter the |
| | | | | | | | | | |

6. Click Pay Bills.

5.

You have now waived the migrated bill, paid the bill on the user record, and checked the item in from the user account. The item record will now have a Current Location of LOST_CLAIM and can be checked out to a DISCARD user if desired.

Note: If staff checks in an item that was migrated as billed, the migrated bill is not automatically waived and a new bill for overdues may be assessed. If staff notices that a user has a bill with reason REPLACE but that the corresponding item is not checked out to that user any longer, it is a red flag to pay that bill with a reason of MIGRATBILL.