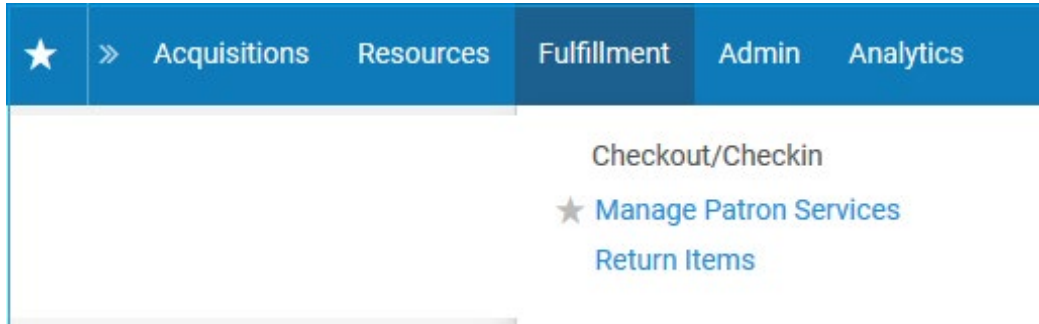


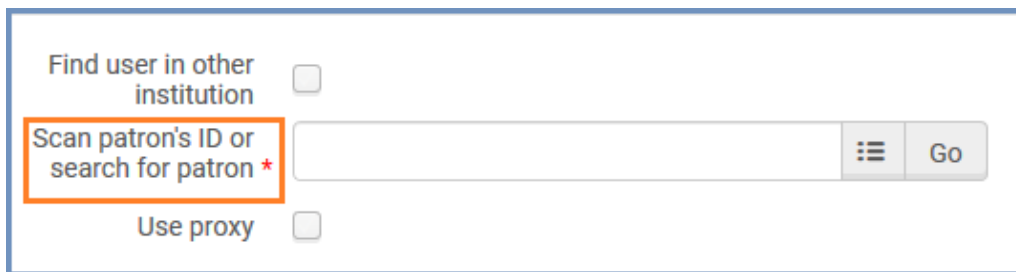
Billing

Documentation by Joanne Miller, University of Illinois – Urbana-Champaign

1. Go to “Fulfillment” and select “Manage Patron Services.”

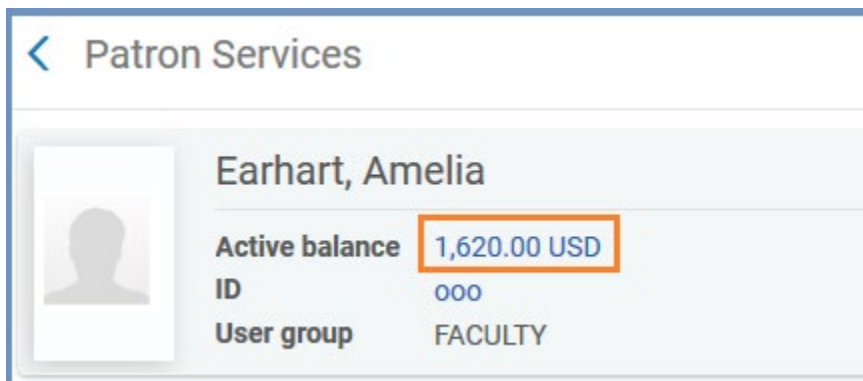


2. Look the patron up in the search box.



A screenshot of a search box for patron services. The search box is a rectangular form with a light gray background. It contains the following elements: a checkbox labeled "Find user in other institution", a text input field with the placeholder text "Scan patron's ID or search for patron *", a "Go" button, and a checkbox labeled "Use proxy".

3. Click on the active balance to go directly to the fines and fees.



A screenshot of the "Patron Services" page for a patron named Earhart, Amelia. The page has a light gray background and a blue header with a back arrow and the text "Patron Services". Below the header, there is a profile card for Earhart, Amelia. The card contains a placeholder for a profile picture, the name "Earhart, Amelia", and the following information: "Active balance" (highlighted in blue) with a value of "1,620.00 USD", "ID" with a value of "000", and "User group" with a value of "FACULTY".

4. This opens the Fines/Fees tab on the patron's record. The active balance and currently filtered balance will be the same. Using the filters located below the Fine/Fee summary may change the currently filtered balance.

Active balance	1,620.00 USD	Disputed balance	0.00 USD	Transferred balance	0.00 USD
Currently filtered balance	1,620.00 USD	Currently filtered disputed balance	0.00 USD		

1 - 20 of 24 Title 🔍 Waive Selected + Add Fine or Fee 🔄 🌐

Fine/Fee type : All Status : Active Fee Owner : All

<input type="checkbox"/>	Creation Date	Fine/Fee type	Status	Status Date	Comm	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance
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5. Click on the drop-down menu for each category in order to filter by Fine/Fee type, Status, and/or Fee Owner.

Active balance	1,620.00 USD	Disputed balance	0.00 USD	Transferred balance	0.00 USD
Currently filtered balance	270.00 USD	Currently filtered disputed balance	0.00 USD		

1 - 4 of 4 Title 🔍 Waive Selected + Add Fine or Fee 🔄 🌐

Fine/Fee type : All Status : Active Fee Owner : Main Stacks Clear all

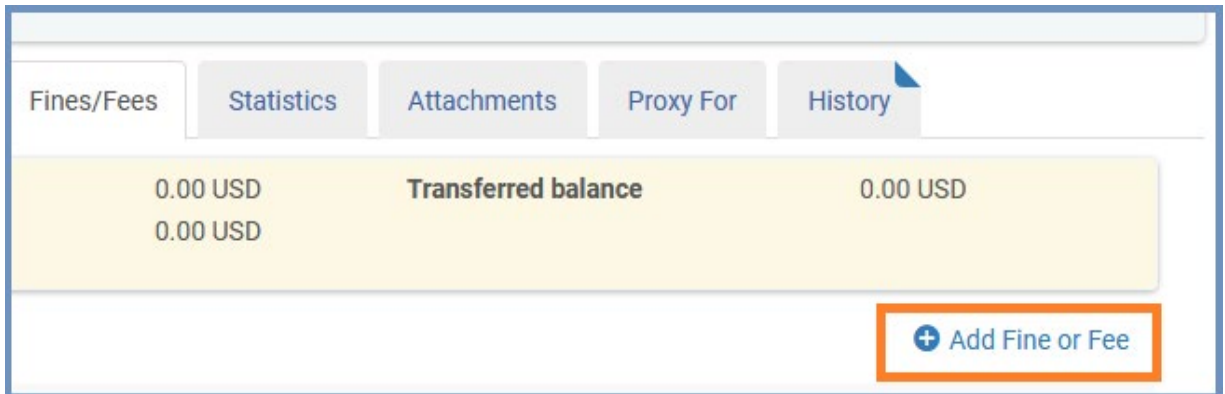
<input type="checkbox"/>	Creation Date	Fine/Fee type	Status	Status Date	Comm	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance
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6. Only fees from the selected library are displayed. Click on "Clear all" to reset filters.

Fine/Fee type : All Status : Active Fee Owner : Main Stacks Clear all

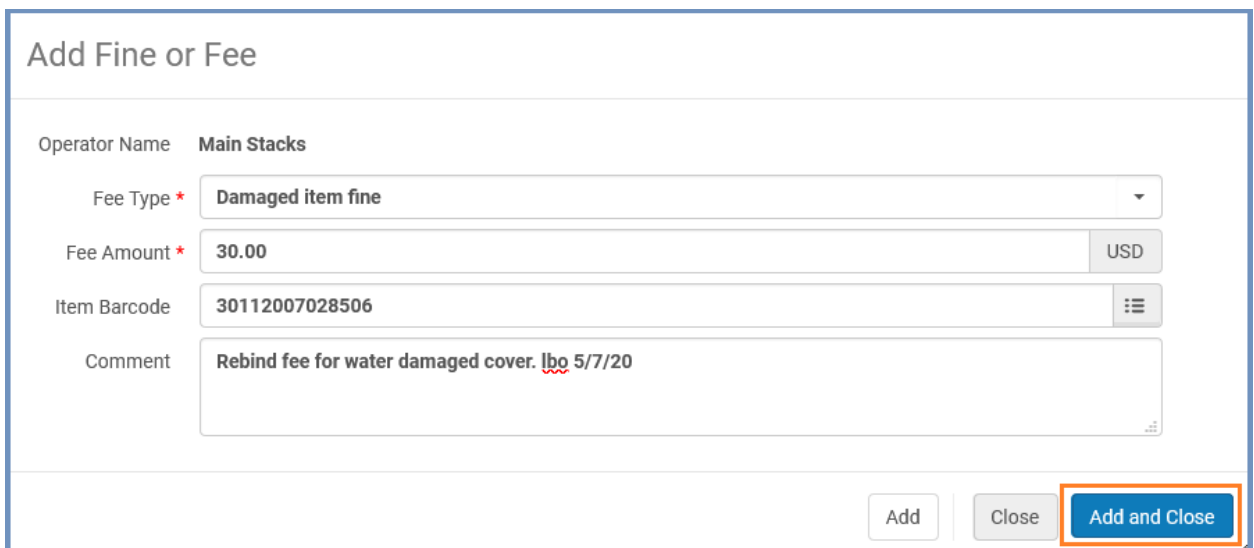
<input type="checkbox"/>	Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance
1 <input type="checkbox"/>	04/20/2020	Lost item process fee	Active	04/20/2020	-	Main Stacks	Children of Lir : stories from Ireland / by Desmond Hogan.	30112047690877	10.00 USD	10.00 USD
2 <input type="checkbox"/>	04/20/2020	Lost item replacement fee	Active	04/20/2020	-	Main Stacks	Children of Lir : stories from Ireland / by Desmond Hogan.	30112047690877	125.00 USD	125.00 USD
3 <input type="checkbox"/>	03/30/2020	Lost item process fee	Active	03/30/2020	-	Main Stacks	New waves in ethics / edited by Thom Brooks.	30112108595338	10.00 USD	10.00 USD

7. To add a fine manually, click “Add Fine or Fee” on the lower right side of the screen.



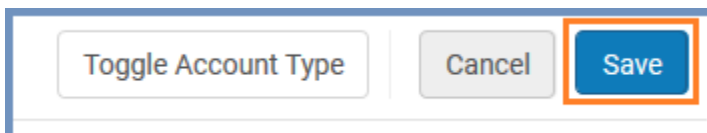
The screenshot shows a web interface with a navigation bar at the top containing tabs for "Fines/Fees", "Statistics", "Attachments", "Proxy For", and "History". Below the navigation bar is a summary table with a yellow background. The table has three columns: the first column shows "0.00 USD" and "0.00 USD" stacked vertically; the second column is labeled "Transferred balance"; the third column shows "0.00 USD". In the bottom right corner of the interface, there is a button with a plus sign and the text "Add Fine or Fee", which is highlighted with an orange border.

8. Fill out the form. The required fields are marked with an asterisk. Filling out the other fields is recommended. Click “Add” if you have another fine to add or “Add and Close” if you are done.



The screenshot shows the "Add Fine or Fee" form. The "Operator Name" is set to "Main Stacks". The "Fee Type" dropdown menu is set to "Damaged item fine". The "Fee Amount" is "30.00" and the currency is "USD". The "Item Barcode" is "30112007028506". The "Comment" field contains the text "Rebind fee for water damaged cover. lbo 5/7/20". At the bottom right of the form, there are three buttons: "Add", "Close", and "Add and Close". The "Add and Close" button is highlighted with an orange border.

9. Click “Save” at the top right side.



The screenshot shows the bottom right corner of the form, featuring three buttons: "Toggle Account Type", "Cancel", and "Save". The "Save" button is highlighted with an orange border.

10. To waive a fee, click on the ellipsis on the far right of the item and choose ‘Waive.’

Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaini Balance	
Active	05/07...	Rebind fee for water damaged cover. lbo 5/7/20	Main Stacks	Summer meditations / Václav Havel ; translated from the Czech by Paul Wilson.	301120...	30.00 USD	30.00 USD	⋮

Waive
Dispute

11. You may also click the box to the left of the item and choose “Waive Selected” at the upper right side. This option allows you to waive multiple fines. If multiple fines are waived at the same time, the waiving reason and comment will be the same for each one.

1 - 1 of 1 Title [Q] Waive Selected +

Fine/Fee type : All Status : Active Fee Owner : All

<input type="checkbox"/>	Creati Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Item Barcode
1 <input type="checkbox"/>	05/07...	Damaged item fine	Active	05/07...	Rebind fee for water damaged cover. lbo 5/7/20	Main Stacks	Summer meditations / Václav Havel ; translated from the Czech by Paul Wilson.	301120...

12. Choose the “Waiving Reason” from the drop-down menu, add a comment if necessary, and click “Waive” at the upper right side.

Waiving Fine/Fee Cancel Waive

You are about to waive the following fine

Operator name **Stacks, Main**

Fine/Fee type **Damaged item fine**

Fee amount USD

Waiving Reason * **Other**

Comment

13. Click "Confirm" to waive the fine.

Waive Confirmation

You are about to waive 30.00 USD. Do you confirm?

14. Click "Save" at the top right side.

15. To see the fine that has been waived, click on the drop-down menu by "Status" to filter for "Closed" fines.

General Information | Contact Information | Identifiers | Notes | Blocks | Fines/Fees | Statistics | Attachments | Proxy For

History

Active balance	1,620.00 USD	Disputed balance	0.00 USD	Transferred balance	0.00 USD
Currently filtered balance	0.00 USD	Currently filtered disputed balance	0.00 USD		

1 - 3 of 3 Title Waive Selected Add Fine or Fee

Fine/Fee type: All **Status: Closed** Fee Owner: All

Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance
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