

CIRCULATION TASKS – FINES and FEES		
<u>Sierra</u>	<u>CARL•X</u>	<u>CARL•Connect Staff</u>
Add fine to patron account	<ul style="list-style-type: none"> • Start in the patron record • Go to the Summary tab • Select “Manual Fine” at the bottom of the window. • Add a fine amount, description, and/or item number if needed • Click, “Write Fine.” 	Must be done in CARL•X
Adding Manual Fines	<ul style="list-style-type: none"> • In the patron’s record, click the Summary tab • Select “Manual Fine” at the bottom of the window • Add the fine amount, description, and/or item number • Click, “Write Fine” <p>**The Fees tab has common standard fees that can be easily added as well.</p>	Must be done in CARL•X
Adding a Standard Fee	<ul style="list-style-type: none"> • Go to the patron’s record • Go to the Fees tab • Select the standard fee from the Library Fee dropdown menu • Click the “Write Library/Service Fee(s)” button • If the patron isn’t paying now, click “Pay Later” 	Must be done in CARL•X
Billing for Lost or Damaged Item	<ul style="list-style-type: none"> • Start in a patron record • Go to the Summary tab • Select “Charges” • Highlight the item you wish to bill and click “Go Lost” at the bottom • A payment window will appear • Click “Pay Later” to bill the item. Alternately, a patron can pay right away from this window 	Must be done in CARL•X
Collection Agency Report	TBD	TBD
Making a Payment	<ul style="list-style-type: none"> • In a patron record, click on the Summary tab • Click the radio button for Fines • Select the fine(s) to be paid • Click “Pay” 	<ul style="list-style-type: none"> • From a patron’s record, click “My Account” • Click “Fines” on the left • Check the box in the “Pay” column to pay a specific fine

	<ul style="list-style-type: none"> • Check fine(s) to pay and click “Pay Fine” 	<ul style="list-style-type: none"> • Click “Pay All” or “Pay Some” • Choose the payment method <p>Note: Partial Payments are accepted when choosing “Pay Some;” however, bills must be paid in full.</p>
Reinstate Fines	Add back as Manual Fine	Must be done in CARL•X
View Patron Fines History	<ul style="list-style-type: none"> • Open the patron’s record • Click the History tab • Select the “Fine History” tab 	<ul style="list-style-type: none"> • In patron record, click “My Account.” A new browser will open with more patron information • Click “Fine History”
Waive Fine	<ul style="list-style-type: none"> • Start in a patron record • Go to the Summary tab • Click the radio button for “Fines” • Select the fine(s) to be waived • Click “Pay” • Select the fine(s) • Click “Waive Fine” 	<ul style="list-style-type: none"> • From a patron’s record, click “My Account” • Click “Fines” on the left <p>There are two ways to waive:</p> <ul style="list-style-type: none"> • Check the “Pay” box at the end of the fine • Click “Waive” above the grid • Enter a reason for waiving the fine • Click “Complete” or “Complete and Print” <p>OR</p> <ul style="list-style-type: none"> • Click the “Waive” option above the grid first to waive all fines • Enter a waiver note • Click “Complete” or “Complete and Print” <p>**You can partially waive by clicking the box in the upper right corner of the popup box and changing the amount.</p>