Processing Patron Fines

Before you can receive payment or forgive a fine, the overdue item must be returned or claimed as lost or damaged (see “Returning Items” beginning on page 1-4).

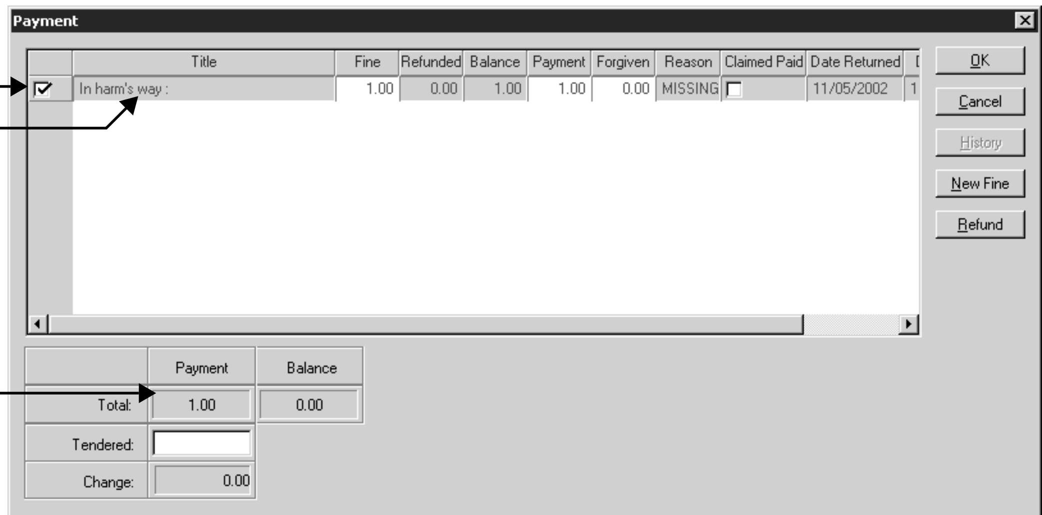
1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER.
3. Click **Payment**. This displays the Payment window (Figure 1.2). The current fine total appears in the **Total** box under **Payment**. If the patron intends to pay the fine total now, skip to step 4.

FIGURE 1.2

Pay check box

Current overdue item

Current fine total



- To exclude an item from payment at this time, clear the **Pay** check box.
- To accept a partial payment on an item’s fine, click the item’s listing in the **Payment** column and type the amount being paid now.
- To forgive all or part of a fine, click the item’s listing in the **Forgiven** column and type the amount to be forgiven.
- To see if a patron previously paid a particular fine, click **Paid Fines**. To record that the item was previously paid, select the **Claimed Paid** check box by that item. This eliminates the item’s fine amount in the **Payment** column, and reduces the payment amount in the **Total** box.
- To increase an item’s fine amount, click the item’s listing in the **Fine** column and type the new amount. (This is useful if you want to charge for not rewinding a tape, damage, and so on.)
- To add a new fine, click **New Fine**. Type the amount of the fine and a note, if desired (the note will display in the **Title** column of the Payment window). Click **OK**.

Tip: *To view refunds, click* ***History****.*

- To apply a refund, click **Refund**. Type the amount of the refund and a note, if desired (the note will display in the **Title** column of the Payment window). Click **OK**.

4. Type the amount of currency received in the **Tendered** line, then click **OK**. If change is due back, a dialog box displays the amount to be returned to the patron. To close the dialog box, click **Close**.

5. This displays a dialog box asking if you want to print a receipt. Click **Yes** or **No**.

   NOTE: If the amount typed in the **Tendered** box is less than the **Total** payment amount, an error message displays. Click **Close** to close the dialog box, then adjust the appropriate entry in the Payment window.

Creating Quick Patron and Item Records

At times, it may be convenient to create a bibliographic (and holding) or patron record while using the M3 Circulation module. Later, you may want to replace a record created on-the-fly with a more complete record.

Creating an Item Record

1. On the **Item** menu, click **Add Bibliographic**.
2. Select a template, then click **OK**.
3. In the 100#a field, type the author's name (last name, first name). (If you are using a version of M3 that supports Authority Control, the Authority Records dialog box displays. Select an author, then click **OK**.)

Tip: *Once you have clicked a MARC field to activate the record pane, you can press CTRL+T to switch between field tag names and numbers.*

4. In the 245#a field, type the title.
5. In the 852#h, i, and k fields, type the call number (if desired).
6. Click **OK**.
7. At the prompt "Create Holding Record?" click **Yes**.
8. To add the call number, right-click in the 852 field, and then click **Insert Subfield**. In the Insert Subfield dialog box, click **k**, and then click **OK**. This inserts a line into 852#k, where you can type the call number.
9. If you are a multi-site library, select your library's location in the 852#a field.
10. In the 852#p field, type the barcode.
11. In the 991#a field, select the item group to which this item will be assigned.
12. If this is a temporary holding, select the **Temp** check box. When the item is returned, the record is marked for deletion, and the barcode record is labeled "detached" so it can be used again.
13. Click **OK**.

Creating a Patron Record

1. On the **Patron** menu, click **Add Patron**. (If more than one patron template exists, the Templates dialog box displays. Select the template you want to use, then click **OK**.)
2. To make sure the patron is not already in the system, type the patron's last name in the first keyword box, then click **Search**.

Note: *If you think the name may be misspelled in the system, use truncation to broaden your keyword search. For example, type* ***whitn**** *to locate whitney, whitnee, whitnie, and so on.*

   - If there is no patron in the system with this name, the Create New Patron Record window displays.

     OR