Assessing and Collecting Fines

Library Manager’s fine management features make it easy to automatically assess, collect and refund fines. Plus, you can manually adjust fines as needed.

Overdue Fines

Once set up, Library Manager assesses overdue fines automatically during checkin. After you check in an overdue item, a message confirms the fine amount charged to the patron.

⚠️ Please note...
- Overdue item "Young Cam Jansen and the ice skate mystery" (Barcode: T 10103)
- Days overdue: 4
- Regina Larkins has been charged an overdue fine of $0.20.

Lost Items Fines and Refunds

Once set up, Library Manager assesses fines automatically when you select the Lost button on any of the following options under the Circulation tab:
- Check Out
- Patron Status
- Copy Status

When you select Lost or Mark Lost, Library Manager assesses a fine automatically for the price of the item as it appears in the copy record. If no price appears in the copy record, Library Manager uses the Max Fine setting in Library Policies to determine the dollar amount. A message shows the default fine amount. You can change the fine to a different amount, if needed. You can also waive the fine by changing the amount to zero before clicking OK.

⚠️ Please note...
- "Hard road west : history & geology along the Gold Rush trail" (Barcode: T 5558) had been marked as lost. The fine information for Camden Wilson (Barcode: 2116205121) has been updated with a credit for $24.96.
- Overdue item "Hard road west : history & geology along the Gold Rush trail" (Barcode: T 5558)
- Days overdue: 9

Library Manager generates a refund automatically when a lost book is checked in and the patron has already paid the fine. When the book is checked in, a message confirms that the patron received a credit. If it is checked in after the due date and you have Destiny set up to automatically calculate overdue fines when a lost book is found, the amount paid on the lost fine is applied to the newly calculated overdue fine. The overdue fine is calculated from the point the book is overdue to the point the book is checked back in.
To refund the amount owed if a patron has no other fines or fines that total less than the credit:

1. Select **Circulation > Fines**.
2. In the **Find Patron** field, scan or type a patron barcode or type a patron name. If you scan a barcode, the Fines page opens automatically. If you type the barcode or name, press **Enter** or click **Go!**. The refund amount appears in parentheses and red text.
3. If you want to print a receipt for this transaction, select the **Print Receipt** checkbox.
4. Click **Update**.
5. From the pop-up that appears, click **Yes**.
   **Note:** If you want to print a receipt without refunding a credit, click **Print It!** instead of **Update**. If the patron has outstanding fines, you will have the option to apply the refund to them.
Other Fines
Other fines are assessed manually by following the steps below:

1. Select **Circulation > Fines**.
2. In the **Find Patron** field, scan or type a patron barcode or type a patron name. If you scan a barcode, the Fines page opens automatically. If you type the barcode or name, press **Enter** or click **Go!**.
3. Click **Add Fine**.
4. From the **Reason** drop-down, select the reason for the fine.
5. If the reason you selected in Step 4 is Copy Specific (Broken Binding, Damaged, Excessive Writing, Missing Barcode, Overdue, Torn Pages, Water Damage or a user-defined copy specific Fine Type), you need to identify the copy. To do so, type or scan the copy barcode in the **Copy** field and click **Go!**.
   **Note:** You can also perform a search for the copy by entering a keyword from the title in the **Copy** field and clicking **Go!**.
6. Enter values in the **Amount**, **Waive** and/or **Pay** fields.
7. Optionally, type a note in the **Fine Note** field. The fine note appears on the Edit Fine page and in the patron’s Fine History.
8. If you want to print a receipt, select the **Print Receipt** checkbox.
9. Click **Save**. If you are waiving part of the fine, a message may appear. Enter the reason for the waiver, and then click **Save**.
   **Note:** If you chose to print a receipt, the printable page appears.

![Image of the Fines page with fields for Reason, Copy, Amount, Waive, Pay, and Fine Note, and options for Print Receipt and Save.]
Accepting Fine Payments
Library Manager lets patrons apply fine payments to the combined balance of all fines they owe or to an individual fine. When the patron asks to apply a payment to a combined balance, Library Manager applies the payment to the fines in date-incurred order – oldest to newest. If the patron has local and off-site fines, Library Manager pays the local fines first.

To enter a payment toward all fines:
1. Select **Circulation > Fines**.
2. In the **Find Patron** field, scan or type a patron barcode or type a patron name. If you scan a barcode, the Fines page opens automatically. If you type the barcode or name, press **Enter** or click **Go!**.
3. In the **Pay** field, enter a payment amount.
4. If you want to print a receipt for the payment, select the **Print Receipt** checkbox.
5. Click **Update**.
   **Note:** If you chose to print a receipt, the printable page appears.

To enter a payment toward a specific fine:
1. Select **Circulation > Fines**.
2. In the **Find Patron** field, scan or type a patron barcode or type a patron name. If you scan a barcode, the Fines page opens automatically. If you type the barcode or name, press **Enter** or click **Go!**.
3. Click ✓ next to the fine amount.
4. In the **Pay** field, enter the amount paid.
5. Click **Save**.
**Viewing Fine History**

With Library Manager, you can easily access an individual patron’s fine history or a historical record of all fine payments and refunds that took place during a specific timeframe in your library.

**Patron Fine History**

You can access an individual’s fine transaction history from their Fines page by clicking the View History button.

<table>
<thead>
<tr>
<th>Library Materials</th>
<th>Textbooks</th>
<th>Resources</th>
<th>Patron only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assess</td>
<td>Amount</td>
<td>Balance</td>
<td>Details</td>
</tr>
<tr>
<td>Electric Past [Copy: T 952] 7/25/2016</td>
<td>$2.25</td>
<td>$2.25</td>
<td>Details</td>
</tr>
<tr>
<td>Fahrenheit 451 [Copy: T 23282] 6/28/2016</td>
<td>$5.00</td>
<td>$0.00</td>
<td>Details</td>
</tr>
</tbody>
</table>

**Fine History Report**

Run the Fine History report to track fine payments and refunds made during a specific time period in your library.

<table>
<thead>
<tr>
<th>East Elementary School</th>
<th>East Elementary School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Patrons</td>
</tr>
<tr>
<td>6/4/2014</td>
<td>Brunelle, Sue</td>
</tr>
<tr>
<td>6/4/2014</td>
<td>Whitfield, Dave</td>
</tr>
<tr>
<td>6/4/2014</td>
<td>Whitfield, Dave</td>
</tr>
</tbody>
</table>

Amount Collected: $53.74

Total Collected: $653.74

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Identifying and Notifying Patrons about Fines Due

Run the Current Checkouts/Fines report to identify and/or notify patrons of any fines due to the library through a report or a notice. Notices can be emailed to individual patrons or patrons’ homeroom teachers if your email server is set up with Destiny.

Dear Tony Beau Eley:
The following library fines are due. Please visit the Circulation Desk to pay your fine(s) as soon as possible.

Notice: Unpaid Fines.

<table>
<thead>
<tr>
<th>Unpaid Fines &amp; Refunds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fine</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>6/4/2016</td>
</tr>
<tr>
<td>Lost LM</td>
</tr>
<tr>
<td>Excessive</td>
</tr>
<tr>
<td>Total:</td>
</tr>
</tbody>
</table>

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