

# User Statuses

Every user in the system has a status. There are four user status settings:

## OK

Patron has full library privileges as defined in their User Profile policy. The patron is in good standing and has no overdue items, bills, or fines.

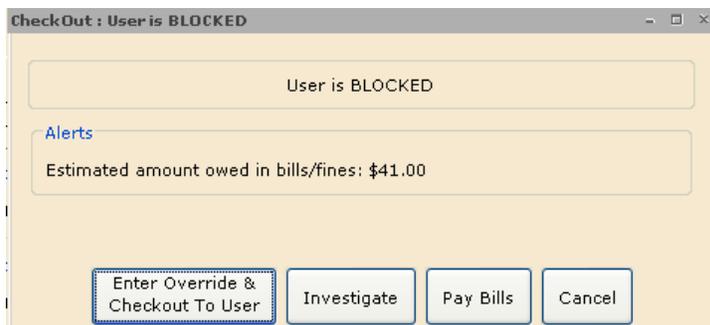
## DELINQUENT

Users become DELINQUENT when they have unpaid bills or overdue items. Delinquent users can still check out items and have all the other privileges of OK users, but Symphony will warn you that the user is delinquent.

## BLOCKED

Users are BLOCKED when their unpaid bills and accruing fines reach a certain amount or they have a certain number of overdue items. The patron cannot place holds or check out items unless you override the status, or until the patron clears their outstanding obligations.

You will get the following pop-up window:



1. If the patron chooses to pay the bill, click on the **Pay Bills** button and follow the procedures listed in the **Paying Bills Wizard** section below.
2. If the patron needs more information about the bill, click on the **Investigate** button. This will allow you to view the charges listed under the **Bills** tab but will not allow you to pay or waive them.
3. If there is a good reason to override the block and allow the patron to checkout materials, click on the **Enter Override & Checkout To User** button. **Your Circulation Supervisor will provide you with the proper override code.**

Symphony maintains these three statuses through the Update User Delinquency Status report. The fourth status is described below:

### **BARRED**

BARRED users cannot check out items. Staff members cannot override this status. A user cannot be automatically barred or unbarred by Symphony; this is a manual process that is set or removed using an override code on the Privilege tab of the user's record. **Only managers have the authority to Bar a patron's privileges.**

# Paying Bills Wizard

Patrons can accrue bills for library services, overdue items, or damaged or lost items. WorkFlows creates bills during daily functions like discharging a book or running a report. You can also create a bill manually using the **Billing a User** wizard.

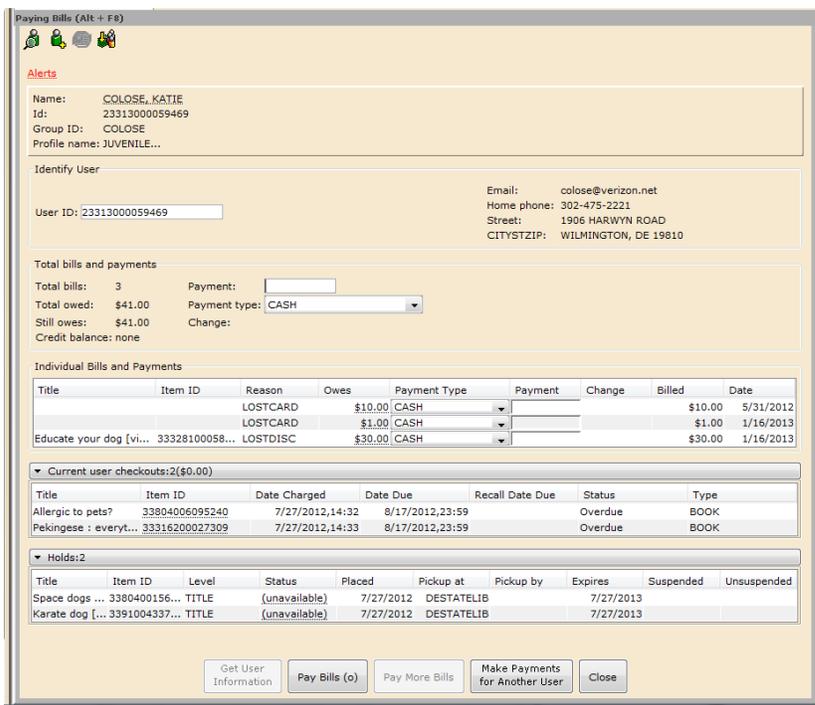
## To pay a bill(s) associated with a user's record



1. On the Common Tasks toolbar, click the **Paying Bills** wizard.
2. Scan the barcode from the user's card, or type the **User ID** and tap the **Enter** key or click **Get User Information**. An alert should pop-up listing problems with the account. Click OK to close it.



3. The following window appears:



Total bills and payments

Total bills: 3  
 Total owed: \$41.00  
 Still owes: \$41.00  
 Credit balance: none

Payment:   
 Payment type: CASH  
 Change:

Individual Bills and Payments

Title	Item ID	Reason	Owes	Payment Type	Payment	Change	Billed	Date
		LOSTCARD	\$10.00	CASH			\$10.00	5/31/2012
		LOSTCARD	\$1.00	CASH			\$1.00	1/16/2013
Educate your dog [vi...	33728100058...	LOSTDISC	\$30.00	CASH			\$30.00	1/16/2013

Current user checkouts: 2(\$0.00)

Title	Item ID	Date Charged	Date Due	Recall Date Due	Status	Type
Allergic to pets?	33804006095240	7/27/2012,14:32	8/17/2012,23:59		Overdue	BOOK
Pekingese : event...	33316200027309	7/27/2012,14:33	8/17/2012,23:59		Overdue	BOOK

Holdings: 2

Title	Item ID	Level	Status	Placed	Pickup at	Pickup by	Expires	Suspended	Unuspended
Space dogs ...	3380400156...	TITLE	(unavailable)	7/27/2012	DESTATELIB		7/27/2013		
Karate dog [...]	3391004337...	TITLE	(unavailable)	7/27/2012	DESTATELIB		7/27/2013		

Buttons: Get User Information, Pay Bills (a), Pay More Bills, Make Payments for Another User, Close

4. To pay the entire bill, type the amount in the **Payment** box. **WorkFlows applies the payments in chronological order, from the oldest bill to the most recent.**

-OR

To pay a specific bill, type the amount in the **Payment** box next to each specific item in the **Individual Bills and Payments** list.

5. In the **Payment type** box, make a selection. Depending on the configuration of your library, you will have several payment types to select such as

**CASH**

**FORGIVEN** - Waives all or part of a user's bill without actual payment.

**CANCEL** - Select this type if the bill was created in error or for too much money.

6. Click **Pay Bills**. If a patron overpays, the system automatically calculates the difference in the **Change** field. **Symphony cannot keep track of credits; you must give the patron their change!**

Total bills and payments

Total bills: 0  
 Total owed: \$41.00  
 Still owes:  
 Credit balance: none

Payment: 45.00  
 Payment type: CASH  
 Change: \$4.00

If the patron makes a partial payment, the balance appears.

**NOTE:** WorkFlows allows up to 50 payments on a single bill. You can make up to 49 partial payments on a single bill; the 50th payment must pay the bill in full. If the 49th payment does not pay the bill in full, the following message appears:

*Partial payment no longer accepted*

With the 50th payment, the patron must pay the bill in full, or you can cancel or forgive the remaining bill amount or create a new bill using the remaining amount.

You may also take other actions on the patrons account from this screen by using the **Right-Click** menus.

The screenshot shows the 'Paying Bills (Alt + F8)' window. It contains several sections: Alerts, Identify User, Total bills and payments, Individual Bills and Payments, Current user checkouts, and Holds. A red arrow points from the text above to a right-click context menu that is open over a row in the 'Current user checkouts' table. The context menu lists various actions such as 'Bill User for Item', 'Change Item ID', 'Claims Returned', 'Discharge', 'Display Holds', 'Display Item', 'Display User', 'Mark Item Lost', 'Mark Item Missing', 'Modify Due Date', 'Place Hold', 'Print Checkout Slip', 'Renew As Seen', and 'Renew As Unseen'. The 'Current user checkouts' table has the following data:

Title	Item ID	Date Charged	Date Due	Recall Date Due	Status	Type
Allergic to pets?	33804006095240	7/27/2012,14:32	8/17/2012		Overdue	BOOK
Pekingese : everythin...	33316200027309	7/27/2012,14:33	8/17/2012		Overdue	BOOK