

Fine Management: Copy Specific or Patron Only - Why and How

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Getting to the Fine Management screen

As there is no direct path to Fine Management anywhere in settings, you will need to navigate to Circulation --> Fines --> pick a patron --> Add Fine --> Other

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This is the screen you'd want to arrive at:

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What's all this?

Fine Type text box - this will be the name of your fine. Character limit is 30, so be brief but clear.

Dropdown box - select either "Copy Specific" or "Patron Only".

Calculation Method - set to either a fixed amount or % of the cost. % of the cost is calculated off of the "Purchase Price" field value of an item - **not** from the resource title's "Replacement Price".

Action buttons - Save or Cancel

The list below - these are all fine types that were created at the site library to suit specific purposes. The edit □ and delete □ buttons allow you to either edit the existing fine type or delete it for good. When you edit an existing fine type, its information is populated in the top area that's also used for the creation of new fine types. Save button simply saves changes you made to the existing fine type. Both copy specific and patron only fine types can be selected on the "Add Fine" screen and assigned to the patron record. Both appear in the selection list when clicking the "Create Fine" button upon the item check-in.

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Copy Specific Fine Type

Copy specific fines are assigned to barcoded items and can have a predefined/default fine amount. These fine types can save you time as you will not be looking up costs of devices/accessories to manually type those in. Note: copy specific fines, as they become linked to an item, will prevent such item from transferring (if this resource type is allowed to be transferrable) to another site along with the patron it's checked out to. The patron will be transferred but the item will stay at the original site as checked out to that patron. The new site's administrator will be able to see both the item check-out and the fine associated with it.

To edit a copy specific fine, simply click the edit icon next to the fine type on the "Manage Fine Types" screen and Save.

To assign a copy specific fine, select the reason (fine type), item type (Library or Resource), enter the barcode, and click "Go".

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The amount will be autopopulated based on the selected fine type's settings. At this point you can add notes

and choose to print the receipt - then click Save.

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The fine will appear on the patron info screen:

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Patron Only Fine Type

Generic fines that are assigned to a patron and are not linked to any specific item. The only retained value is the fine type name - there are no other values or settings associated with a patron only fine.

To edit a patron only fine, click the edit icon next to the fine type on the "Manage Fine Types" screen and Save.

To assign a patron only fine, select the reason (fine type) that's associated with the "Patron Only" type. You will notice that the resulting screen is significantly different from what is generated by selecting a copy specific fine type:

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There is no Library/Resource selection, and the \$ values are always blank by default.

Same as with all fines, you can add notes, choose to print a receipt, and click Save to finish assigning the fine.

Sanity Maintenance

It is highly recommended to come up with a clear naming convention of your fine types to distinguish between copy specific and patron only as they are not identified as such in the drop-down list. For example, you can add a "PO: " prefix to patron only fine types and not add anything to copy specific ones.

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Copy Specific VS Patron Only

Copy Specific Fine Type	Patron Only Fine Type
\$ Amounts can be predefined	No predefined \$ amounts - enter manually each time
Linked both to the patron and to the specific item/copy	Linked only to the patron, not to any specific item/copy
Prevents the auto-transfer of an item with the patron it's checked out to	Does not affect the auto-transfer of any items checked out to the patron
Recommended for commonly assigned fines: damaged devices, lost accessories, torn books, and so on	Recommended for out of ordinary fines: campus property damage, tossing an other student's backpack into a pool of acid, and so on