

# Portland Public Schools

## Via Circulation Quick Reference Guide

### Viewing a Patron's History (of Paid Fines & Notes)

The **Fines** tab displays the patron's outstanding fines and bills. The amount of money owed by the patron displays in parentheses in the tab's title in red. From the **Fines** tab, you can view a patron's history of paid fines and any notes that have been entered.

<div style="border: 1px solid black; padding: 5px;"> <span>Check Out (0)</span>   <span>Checked-Out Items(2)</span>   <span>Holds(0)</span>   <span style="color: red;">Fines(\$18.00)</span>   <span>Check In (0)</span> </div>																																																														
<div style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> <div> <p>Total: <span style="border: 1px solid black; padding: 2px;">\$18.00</span></p> <p>Amount selected: <span style="border: 1px solid black; padding: 2px;">\$0.00</span></p> </div> <div style="text-align: center;"> <span style="border: 1px solid black; padding: 5px 15px; margin-right: 10px;">Collect Money</span> <span style="border: 1px solid black; padding: 5px 15px; margin-right: 10px; color: blue;">Waive Charges</span> <span style="border: 1px solid black; padding: 5px 15px;">Add Charge</span> </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <span style="border: 1px solid black; padding: 5px 15px;">Fines Paid</span> <span style="border: 1px solid black; padding: 5px 15px;">Patron Notes</span> </div> </div>																																																														
<div style="border: 1px solid black; padding: 5px;"> <b>From the Circulation Desk function:</b> </div>																																																														
<b>Step 1</b>	Retrieve the Patron's record.	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center; margin: 0;"><b>Key or Scan Item or Patron Barcode</b></p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p style="text-align: center; margin: 5px 0;"><span>Search</span></p> </div>																																																												
<b>Step 2</b>	Click on the <b>Fines Paid</b> button.	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <span style="border: 1px solid black; padding: 5px 15px; color: blue;">Fines Paid</span> </div>																																																												
<b>Step 3</b>	<p>A <b>Fines Paid</b> dialog window will open.</p> <p>Click on the <b>Print</b> button on this screen to print the history.</p> <p>Click on the <b>Close</b> button to close the window.</p>	<table border="1" style="font-size: small;"> <thead> <tr> <th>Invoice</th> <th>Charge Type</th> <th>Description</th> <th>Amount Due</th> <th>Amount P...</th> <th>Date Paid</th> </tr> </thead> <tbody> <tr> <td>240</td> <td>Overdue</td> <td>Mystic and ri...</td> <td>\$0.50</td> <td>\$0.50</td> <td>07-19-2007</td> </tr> <tr> <td>238</td> <td>Overdue</td> <td>The Depress...</td> <td>\$0.50</td> <td>\$0.25</td> <td>07-19-2007</td> </tr> <tr> <td>236</td> <td>Overdue</td> <td>Global warm...</td> <td>\$1.00</td> <td>\$0.00</td> <td>07-20-2007</td> </tr> <tr> <td>237</td> <td>Overdue</td> <td>James Town...</td> <td>\$1.00</td> <td>\$0.00</td> <td>07-20-2007</td> </tr> <tr> <td>243</td> <td>Lost Book</td> <td>Over the rain...</td> <td>\$15.99</td> <td>\$0.00</td> <td>07-20-2007</td> </tr> <tr> <td>242</td> <td>Lost Book</td> <td>Shout, sister...</td> <td>\$18.00</td> <td>\$18.00</td> <td>07-20-2007</td> </tr> </tbody> </table>	Invoice	Charge Type	Description	Amount Due	Amount P...	Date Paid	240	Overdue	Mystic and ri...	\$0.50	\$0.50	07-19-2007	238	Overdue	The Depress...	\$0.50	\$0.25	07-19-2007	236	Overdue	Global warm...	\$1.00	\$0.00	07-20-2007	237	Overdue	James Town...	\$1.00	\$0.00	07-20-2007	243	Lost Book	Over the rain...	\$15.99	\$0.00	07-20-2007	242	Lost Book	Shout, sister...	\$18.00	\$18.00	07-20-2007																		
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<b>Step 4</b>	<p>To view the detail on an item, click on the item to select it.</p> <p>Click on the <b>View Fine</b> button.</p>	<table border="1" style="font-size: x-small;"> <thead> <tr> <th colspan="2">Detail</th> <th colspan="2">Balance</th> </tr> </thead> <tbody> <tr> <td>Invoice:</td> <td>242</td> <td>Item Charge:</td> <td>\$18.00</td> </tr> <tr> <td>Charge Type:</td> <td>Lost Book</td> <td>Processing Fee:</td> <td>\$0.00</td> </tr> <tr> <td>Call Number:</td> <td>020 ORG Roosevelt Non Fiction</td> <td>Billing Fee:</td> <td>\$0.00</td> </tr> <tr> <td>Author:</td> <td>Orgill, Roxane</td> <td>Total:</td> <td>\$18.00</td> </tr> <tr> <td>Barcode:</td> <td>3316801522447</td> <td>Previous Paid:</td> <td>\$0.00</td> </tr> <tr> <td>Description:</td> <td>Shout, sister, shout: ten girl singers who shaped a century / Roxane Orgill</td> <td>Amount Paid:</td> <td>*****</td> </tr> <tr> <td>Charge Location:</td> <td>3rdof</td> <td>Amount Due:</td> <td>\$0.00</td> </tr> <tr> <td>Statistics Group:</td> <td>0</td> <td></td> <td></td> </tr> <tr> <td>Checkout Date:</td> <td>07-20-2007</td> <td></td> <td></td> </tr> <tr> <td>Due Date:</td> <td>08-23-2008</td> <td></td> <td></td> </tr> <tr> <td>Assessed Date:</td> <td>07-20-2007</td> <td></td> <td></td> </tr> <tr> <td>Date Paid:</td> <td>07-20-2007</td> <td></td> <td></td> </tr> <tr> <td>Payment Status:</td> <td>Full Payment</td> <td></td> <td></td> </tr> <tr> <td>Initials:</td> <td>cko</td> <td></td> <td></td> </tr> </tbody> </table>	Detail		Balance		Invoice:	242	Item Charge:	\$18.00	Charge Type:	Lost Book	Processing Fee:	\$0.00	Call Number:	020 ORG Roosevelt Non Fiction	Billing Fee:	\$0.00	Author:	Orgill, Roxane	Total:	\$18.00	Barcode:	3316801522447	Previous Paid:	\$0.00	Description:	Shout, sister, shout: ten girl singers who shaped a century / Roxane Orgill	Amount Paid:	*****	Charge Location:	3rdof	Amount Due:	\$0.00	Statistics Group:	0			Checkout Date:	07-20-2007			Due Date:	08-23-2008			Assessed Date:	07-20-2007			Date Paid:	07-20-2007			Payment Status:	Full Payment			Initials:	cko		
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<b>Step 5</b>	<p>From this <b>Paid Fine Detail</b> window, you can choose to reinstate a fine, or print the report. Or, of course, close the window by clicking on the appropriate button:</p> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 10px;"> <span style="border: 1px solid black; padding: 5px 15px;">Reinstate Fine</span> <span style="border: 1px solid black; padding: 5px 15px;">Print</span> <span style="border: 1px solid black; padding: 5px 15px;">Close</span> </div>																																																													
<b>PATRON NOTES</b>	<p>Click on the <b>Patron Notes</b> button to view any patron notes.</p> <p>Any notes on the Patron's record will be displayed in a <b>Patron Notes</b> dialog window.</p> <p>Click on the <b>Close</b> button to close the window.</p>	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <span style="border: 1px solid black; padding: 5px 15px; color: blue;">Patron Notes</span> </div> <p>Notes for Goose, Mother</p> <p>* Fri Jul 20 2007: Claimed returned .1958870 on Unknown Date</p> <p style="text-align: right;"><span>Close</span></p>																																																												

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