

How to do a refund for Lost items, if you do not have enough money in the cash drawer

- Make copies of the lost paid receipts
- Print off or Screen shot the Customers Registration Info (Make sure the customers address is correct)
- Go to Item Maintenance-> Type in the item number-> Go to the Notes section-> Click on Who Has It?-> Move the Who Has it? window under the Notes (See picture) (If the item has been checked in you click on Who Had It?)
- Print screenshot of this page after you have moved the Who Has It? /Who Had It? window down so you can see all of the item's information and Print
- Repeat the instructions for each item that is returned after being paid for.
- Go to the Intranet-> Click on Resources-> Click on Forms-> Find Request for Purchase
- Fill out the lines under Vendor Name & Address with the customers information (Name/Library Card # and address)
- Next to that fill in the date, Requesting Department (XXXX Library) Account# (805) and Contact Person (you)
- Below in Program number put 999
- In the Description, write the title of the item, the item number, the cost on the book MINUS the late fee (\$22.95-\$3.00 is what it will look like)

- Quantity (enter at least a 1 in there or it will not put the price in Encumbrance)
- Print the RFP and have library manager sign then submit to the Business Office
- Add a note to the customer record in Carl-X that an RFP has been sent in for the reimbursement for that item.