When other institutions’ patrons have lost our items:

1.) Daniel Le will draw up all the invoices for the money that other institutions owe us. Those invoices will tell the institutions to remit payment to Daniel in the Clarkston Campus Library.

2.) Daniel will post the adjusted GE Institutional Billing fines to each non-GPC patron’s account, and remove the system-generated $70.00 fines. (Detailed instructions for this process on p.2 of this document.)

3.) When Daniel receives a payment, she will discharge the items, credit the appropriate patron record, and deposit the check with the other Clarkston fines/fees.

4.) Due to constraints on staff time, it is not our policy to issue refunds to institutions that have paid us for a lost item that their patron subsequently returned.

5.) If a patron returns a book that has been invoiced for institutional billing, but has not been paid by the institution, do not forgive the IB fine. Discharge the book, and then email Daniel, listing the title of the book and any other information you may have available to you (such as the patron’s name or institution). Daniel will attempt to contact the institution to see if they’ve submitted their invoice to their accounting department. If they haven’t or if they haven’t received the invoice, Daniel will forgive the fine (and re-invoice the institution if they still owe for other patrons). However, if the institution has already submitted to their accounting department, GPC will not remove the fine until payment is received from the institution. The institution will need to recoup the funds from their patron.

When our patrons have lost other institutions’ items:

1.) Invoices for items that our students have lost are coming to Amy. She will give them to Rose Davis to pay out of the Library Technical Services budget.
2.) Rose will then send these invoices to Daniel and ask that he add the fine to the GPC patron's account (with an explanatory note) and Banner block them. Everyone gets Banner blocked until they have reimbursed us for GE Institutional Billing fines, regardless of whether they are students, faculty, or staff.

**Creating Invoices**

Go to Web Reports (https://gil.gpc.edu/reports)

Click Circulation Reports > Run Custom Reports

Go to the GIL Express Reports section

Click “Institutional Billing Summary”

The dates should already be populated for the correct fiscal year, but check it and correct if necessary.

Don’t do the “Send Informational Email” one. Just do “Generate Information for Billing”.

Click Submit Report.

Pull up old invoice from previous FY and use as template for new ones.

Click on hyperlinked name for the institution that you want to invoice. (We only invoice institutions that have a fine in the “Due to Your Library” column.)

Click Process this Report.

Copy the address from “Please Send this Invoice to:” into your template. Leave everything else in the template the same (except the table) because these bills need to be remitted to Daniel Le.

Copy and paste in the new table.

Print on letterhead.

Mail.
Adding GIL Express Institutional Billing Fines to UB Patron Records
(Amy will be handling this aspect of Institutional Billing)

1.) Using the invoice generated from GE Reports, pull up the patron record to which the fine is to be added. (You will have to search by patron name.)

2.) Click on the fines/fees button in the patron record.

3.) Copy the barcode(s) for the system-generated ($70.00) fines for the lost GE items into a Notepad file. You will need these later. (You can copy these barcodes by highlighting the fine in question, clicking “Item Info”, highlighting the barcode and clicking Ctrl-C.)

4.) Click the “Add” button, to add the adjusted Institutional Billing fine.

5.) In the Add Fine/Fee window, select “GIL Express Instit. Reimb” as the Fee Type.

6.) In the Amount field, enter the amount given for the first item on the invoice.

7.) In the Item Barcode field, paste in the appropriate barcode from the Notepad file you created earlier.

8.) In the Description field, enter a note along the lines of, “9/23/09: GIL Express item lost in FY[insert year]. Has been invoiced for Institutional Billing.-- [Your Name]”

![Add Fine/Fee Window](image)
9.) Click “OK”.

10.) The fine will now appear on the patron’s account.

11.) Now you can forgive the system-generated ($70.00) fine associated with the same barcode. *(Select fine. Hit Post. MAKE SURE YOU ARE NOT FORGIVING THE PATRON TOTAL. Change that radio button to Selected & Posting Type to Forgive.)* In the description field, enter something like, “9/23/09: GIL Express item lost in FY[insert year]. Has been invoiced for Institutional Billing at the rate of $32.45. Forgiving this system-generated fine.-- [Your Name]”

*GIL does not require us to forgive the $35.00 processing fee. It can be left on the patron’s account, for them to pay, but we have chosen to forgive this fee as a courtesy.*

12.) Do this for all Institutional Billing invoices.

**Miscellaneous Notes:**
Check Web Reports periodically to see if all the invoices that we’ve sent out have been paid. If an institution hasn’t paid their invoice by the end of institutional billing, send one more copy to the IB contact. If there is still no response within a couple of weeks, send a copy of it to the library director. If that does not generate a response, forward the information to Viki Timian.