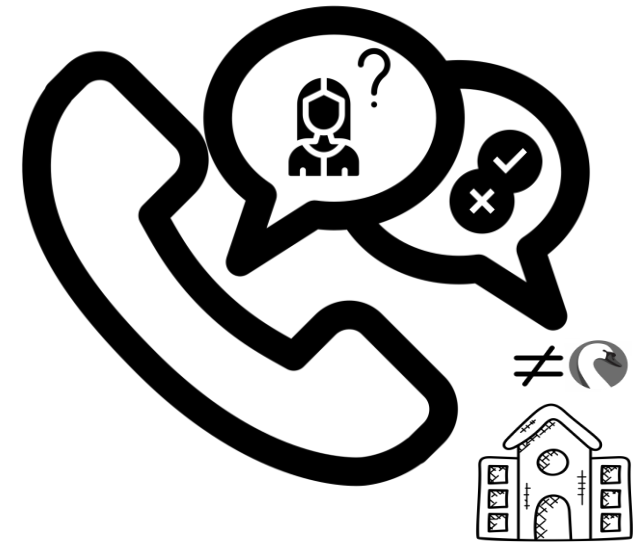


What happens with
Non-SWAN RB Bills?



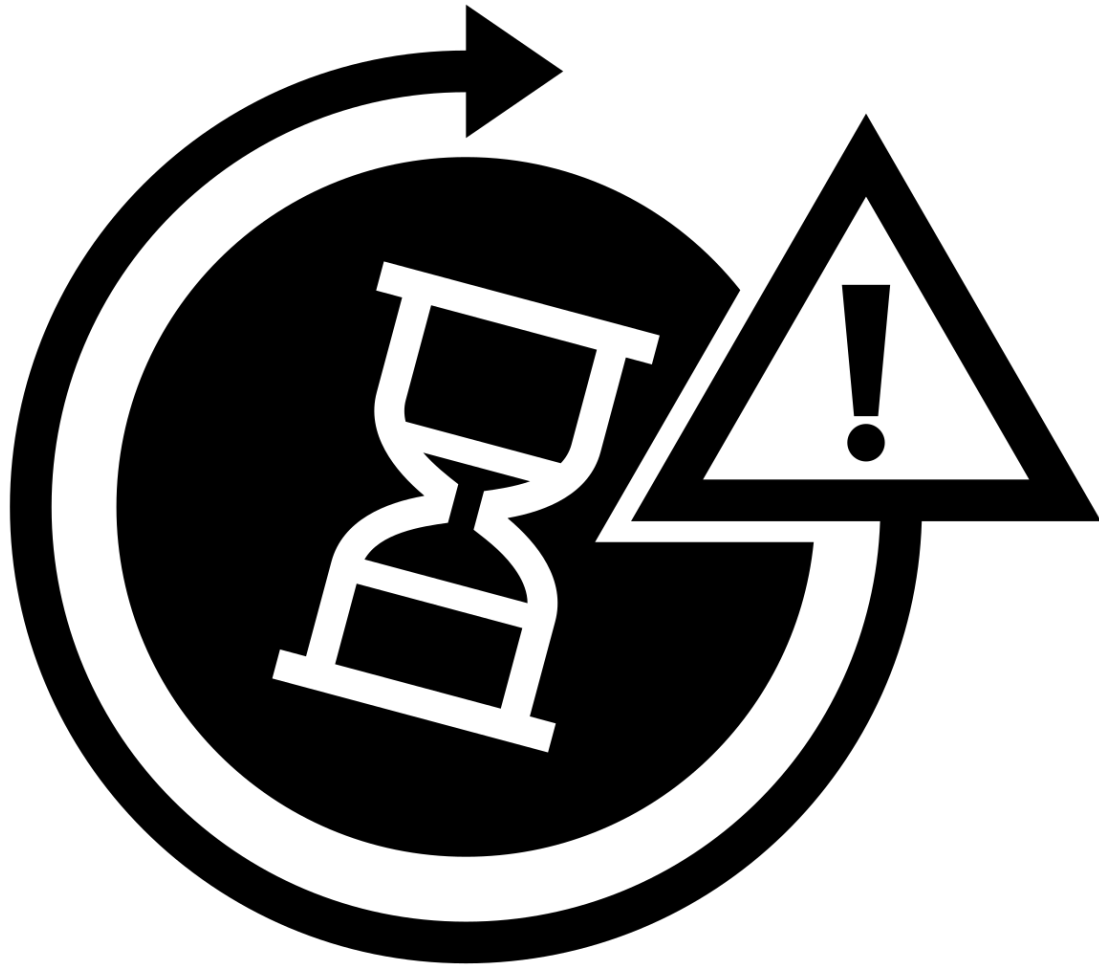
Verify first

- All non-SWAN RB patrons must be verified with their home library prior to registration
- If their home-library status is good, they may have 1 year of SWAN borrowing privilege or their expiration date: whichever is sooner.



| Home library status and expiration | Resolves to |
|------------------------------------|-----------------------------------|
| Good standing, Exp: 06/2027 | SWAN privilege: 1 year from today |
| Good standing, Exp: 02/2024 | SWAN privilege: 02/2024 |
| Expired | Do not register/ renew/ reinstate |
| Blocked/barred/reported lost | Do not register/ renew/ reinstate |

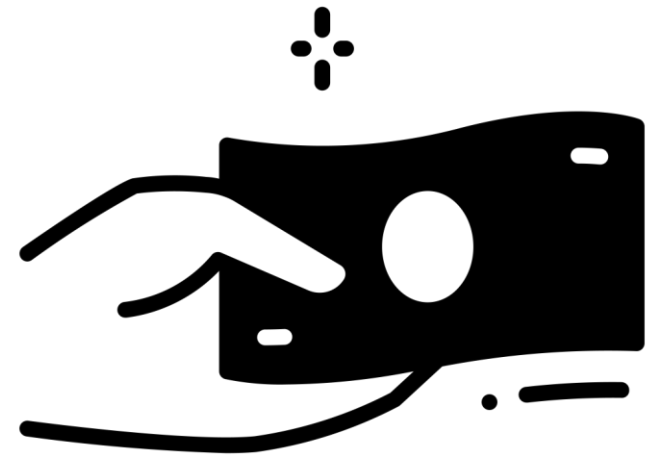
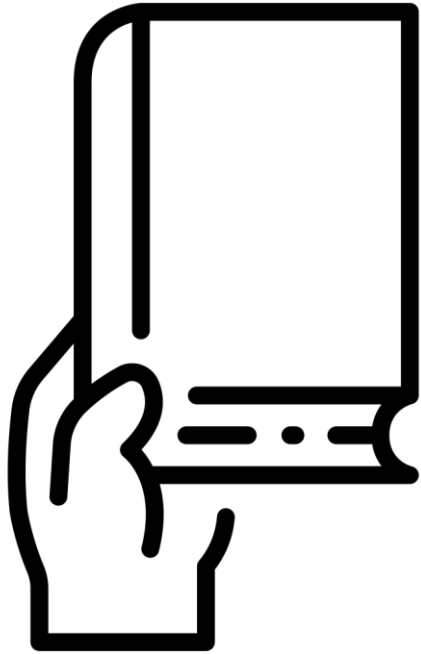
When a delinquency in SWAN occurs



- Patron notices begin:
 - Courtesy -2 days
 - Overdue +7, +14 days
 - Bill Notice +42 days

Lost bill created at 42 days

The goal is to have the patron either return the item or pay for the loss before 365 days



Patron's home library may be notified at 42 days



Many non-SWAN libraries receive a monthly BLUEcloud Analytics report of their billed users (42-365 days overdue)

- Aurora
 - Arlington Heights
 - Bartlett
 - Chicago Public
 - Elk Grove Village
 - Elmhurst
 - Fountaindale
 - Fox Lake
 - Gail Borden (Elgin)
 - Hampshire
 - Helen Plum (Lombard)
 - Highland Park
 - Hinckley
 - Hometown
 - Joliet
 - Lemont
 - Lincolnwood
 - Lisle
 - Manhattan
 - Mokena
 - Mt. Prospect
 - Naperville
 - New Lenox
 - Orland Park
 - Oswego
 - Peotone
 - Plainfield
 - Poplar Creek
 - Schaumburg
 - Skokie
 - Somonauk
 - Sycamore
 - Vernon
 - Wheaton
 - White Oak
 - Winfield
 - Yorkville
- *as of 11/2023

One year passes

- The patron has a full year from the **Due Date** to return the item or pay for it.
- Notices are sent, the patron is blocked
- Where applicable, the patron is also blocked at their home library. (Scheduled reports delivered monthly via BCA)
- Some non-SWAN libraries also contact their patron to encourage return or payment to SWAN

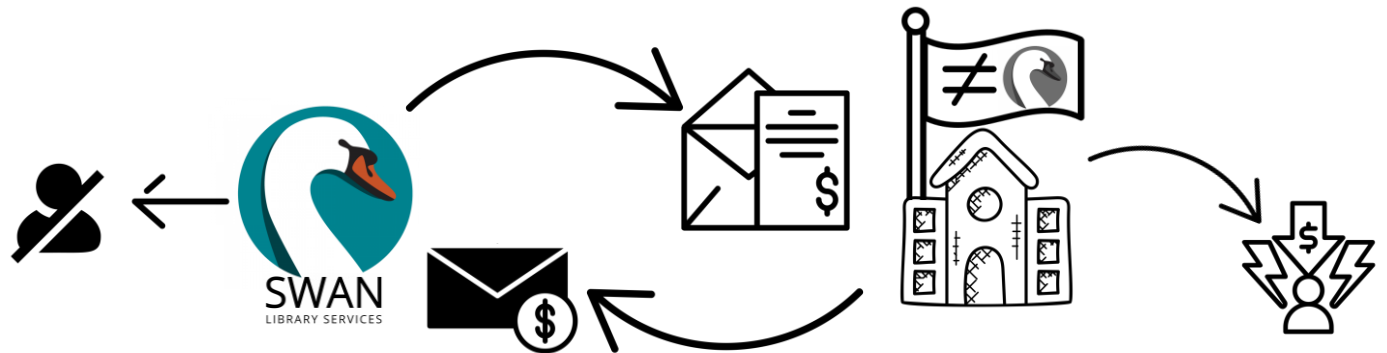


Custom Longoverdue Report runs

- At 365 days overdue, the item is discarded and a LONGOVRDUE bill created.
- The patron must now pay for the lost item

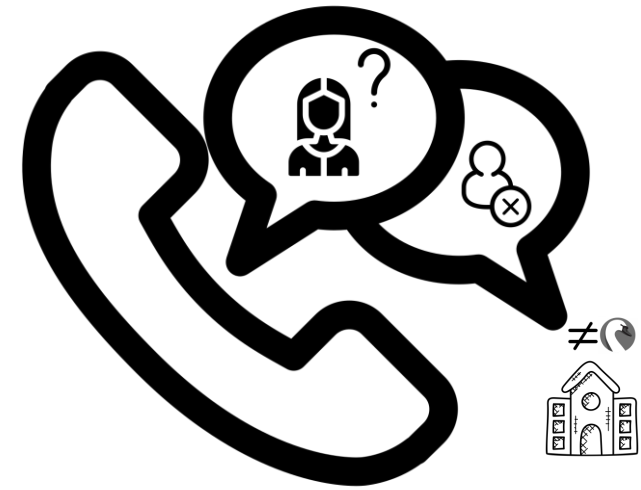
SWAN invoices non-SWAN library

- At the new quarter, unpaid LONGOVRDUE bills are invoiced to the patron's library.
- SWAN-side bill is cleared, patron record barred and noted
- Non-SWAN library remits item price to SWAN and bills their patron for the same amount



Verify

- The SWAN-side record may be clear, but the patron owes the SWAN losses to their home library
- Read user account notes
- Look for “RBLIBREIMB” as a payment type in the “paid bills” list to see what was paid by patron’s library, not the patron themselves
- Do not reinstate a barred user without verification
- Refer library questions to SWAN HQ
- Refer patron questions to their home library



Example

1. Open the bills tab
2. Switch the display to Paid bills
3. Sort by date. (recent transactions are more likely to be questioned.)
4. Only LONGOVRDUE bills will have been invoiced to a patron's library
5. Invoiced losses will have SWAN as their payment library

Display User

Alerts Notes

Name: T
Id: 0
Group ID:
Profile name: CHICAGO_P...

Identify user
User ID: 0.....

Summary Addresses Extended Info SMS Notice Contact Info **Bills** Checkouts Holds Routings Bookings Suspension User Groups

Paid bills: 152(\$0.00)

| Title | Item ID | Reason | Owes | Billed | Date | Payment library | Note |
|--|----------------|------------|--------|---------|--------------------|-----------------|--|
| Full house, The complete fourth sea... | 31186009015678 | LOST | \$0.00 | \$10.00 | 10/2/2023 OLS | | |
| | | LONGOVRDUE | \$0.00 | \$50.00 | 6/16/2023 SWS | | Title: The X-files. The complete sec... |
| | | LONGOVRDUE | \$0.00 | \$15.00 | 6/16/2023 OLS | | Title: Lethal weapon 2, ID: 311860... |
| | | LONGOVRDUE | \$0.00 | \$23.00 | 5/12/2023 SWS | | Title: Full house, The complete sixt... |
| | | LONGOVRDUE | \$0.00 | \$20.00 | 5/12/2023 SWS | | Title: Snake eyes, ID: 3180300189... |
| | | LONGOVRDUE | \$0.00 | \$12.00 | 4/21/2023 SWS | | Title: The Wiggles. Top of the tots, ... |
| That's so Raven, Disguise the limit | 32778001692832 | OVERDUE | \$0.00 | \$0.70 | 2/28/2022 OLS | | |
| That's so Raven, Disguise the limit | 32778001692832 | OVERDUE | \$0.00 | \$1.20 | 2/13/2022 OLS | | |
| The three stooges | 32778001794646 | OVERDUE | \$0.00 | \$19.96 | 12/30/2021 OLS | | |
| The three stooges | 32778001794646 | OVERDUE | \$0.00 | \$8.00 | 12/6/2021 OLS | | |
| The three stooges | 32778001794646 | OVERDUE | \$0.00 | \$2.00 | 11/24/2021 OLS | | |
| | | LOSTX | \$0.00 | \$10.00 | 9/3/2021 AMS | | 31145010488100 DISC 1 MISSING |
| Scream | 32778001636409 | OVERDUE | \$0.00 | \$9.00 | 9/2/2021 EVS | | |
| That's so Raven, Disguise the limit | 32778001692832 | OVERDUE | \$0.00 | \$2.20 | 9/2/2021 EVS | | |
| Disney Channel holiday | 32778001236432 | OVERDUE | \$0.00 | \$2.20 | 9/2/2021 EVS | | |
| Full house, The complete seventh s... | 31186008832552 | LOST | \$0.00 | \$23.00 | 9/16/2020 ILL_LIBS | | |
| Full house, The complete seventh s... | 31186008832552 | PROCESSFEE | \$0.00 | \$5.00 | 9/16/2020 OLS | | |
| Crocodile Dundee / Rimfire Films pr... | | LOST | \$0.00 | \$15.00 | 9/16/2020 ILL_LIBS | | |
| Crocodile Dundee / Rimfire Films pr... | | PROCESSFEE | \$0.00 | \$5.00 | 9/16/2020 OLS | | |
| Why did I get married? | 32778001371437 | LOST | \$0.00 | \$30.00 | 9/1/2020 EVS | | |
| Why did I get married? | 32778001371437 | PROCESSFEE | \$0.00 | \$5.00 | 9/1/2020 EVS | | |

Display options
Library: All libraries Bills: Paid

Display this User (0) Display Another User Close

Example

Click the amount owed to open the bill glossary and see the payment detail

6. This bill was invoiced to CPL in the October Quarterly Billing on 10/2/2023

7. SWAN cleared the bill with the payment type RBLIBREIMB to indicate the RB patron's library did the reimbursement

The screenshot shows a software window titled "Display User : Glossary". It contains the following information:

- Item information:** Title: Call#:
- Bill information:**

| | | | | | |
|-------------------|-----------|--------------------|-----------|--------------|------------|
| Billed: | \$50.00 | Tax: | | Reason: | LONGOVRDUE |
| # payments: | 1 | Date: | 6/16/2023 | Last notice: | |
| Still owes: | \$0.00 | Number of notices: | 0 | Library: | ILL_LIBS |
| Transaction date: | 6/16/2023 | Date paid: | 10/2/2023 | | |
- Payments:**

| | | | | | |
|------------------|-----------|---------|---------|---------------|-----------|
| Payment date: | 10/2/2023 | Amount: | \$50.00 | Payment type: | RBLIBREIM |
| Payment library: | SWS | | | | |
- Note:** Title: The X-files. The complete second season, ID: 31186007008139, Type: DVD_BOXSET, Library: OLS, Due: 06/15/2022

Blue circles with numbers 6 and 7 are overlaid on the screenshot. Circle 6 is positioned over the "Payment library: SWS" field. Circle 7 is positioned over the "Payment type: RBLIBREIM" field. A "Close" button is located at the bottom center of the window.

Stay Curious

- Read notes
- Look in glossaries
- Ask questions



Photo by Elena Vagengeim from Noun Project

Questions?

Email help@swanlibraries.net