Fee, Fine, Foe, Um?—All About Charges

Tip for: 01.23.17

What are the differences between a charge, fee, and a fine—and how do you use them?

Charges

A Charge is something that is unmodifiable. This includes manually-charged amounts via the **Charges** button or the **F** command, or the end result of an overdue fine; the term 'Charge' is also used as the overall term for any charge/fine/fee charged to a patron.

All Charges that have not been paid show in the **Charges** tab and the **Charges** subtab in Circulation. From here you can **Make Payments**, and **Print** a list of all Charges.

Note that applying **credit** to or **forgiving** a charge is now done via **Make Payment** in v7.

> ✅ Need to modify a charge to a smaller amount? Select the charge, click **Make Payment**, and enter an amount in **Forgive** that brings the balance down to where it should be.

Fines

A 'Fine' is an **Overdue Fine** that is still accumulating until the book is returned. Once a book is returned, the Fine then becomes a Charge.

Overdue Fines are controlled by Item Policies (**Fine Rate**), limited by Patron Policy (**Maximum fine for overdue item** or **Fines limited by item cost**), and show up in Circulation under the Charges subtab. Overdue Fines are *still accumulating*, so patrons can pay their fines so far, but if they haven't returned the book they will continue to get Overdue Fines.

Fees

A Fee is a charge that is created by Alexandria based on Policies and Preferences without operator assistance, e.g. for Lost or Damaged items. (Although the **F** command is for 'Charge Fee', it is a *charge* more than a *fee*.)

- The Fee amount for **Damaged items** is set in your **Damage Codes** preferences. When you mark an item as being damaged (using the **DL** command on the current patron and item), that fee is automatically charged to the patron.
- When a book is **Lost**, the patron will automatically be charged the **Replacement Cost**; the Default for that is set in the Item Policy, but can be changed individually per Copy record.
- If you use **Loan Fees**, these are set by Item Policy, and apply when the item is checked out.
- **Returned Lost Item Fees** are set in Circulation Rules preferences; when a lost item is returned, the initial charge is removed or refunded, but the patron will be charged this Returned Lost Item Fee Amount.

History

All **Payments** are found under the History subtab (**v7**) or Payments subtab (**v6**), where you can see more details, print receipts, and refund any payment transaction.

History in v7 is also where you can **Add Credits** for the current patron (meaning you are receiving money to add to the patron's account), or **Refund Credits** (meaning you are giving the patron money, e.g. if they are graduating).

In v6, you will manage credits under the **Credits** subtab.

Does that make things clearer? Don't worry, we'll cover related topics over the next few weeks, and soon you will be an expert on Alexandria financial processing!