

# Item's Home Institution: Lost and Paid Status

This workflow explains how to process a Lost item as Lost and Paid in Alma when a patron has paid the replacement fee, allowing the system to:

- Remove the item from the patron's Active Loans
- Mark the item's process type as Lost and Paid
- Resolve the loan without requiring the item to be returned

Use this workflow when:

- A patron pays for a Lost item and will not be returning it
- Staff need to finalize the loan and remove it from the patron's account
- Replacement costs have been collected and the item is considered permanently lost

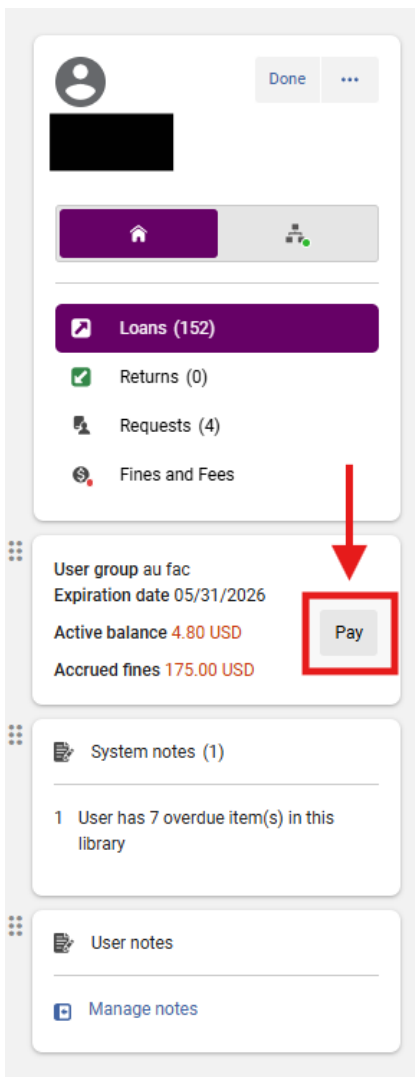
Note: Without using the Lost and Paid functionality, items may remain on the patron's account in Lost status even after payment, leading to confusion and inaccurate loan records.

## Required Roles

- Fulfillment Operator
- Circulation Desk Manager


**1: Locate the Patron Record** Navigate to Fulfillment > Checkout/Checkin > Manage Patron Services> Search for and open the patron record


**2: Access the Payment Screen** Select the <Pay> button next to the Active Balance



**5: Select <View Fines and fees full list>** Selecting specific fines ensures that only the intended lost item charge is processed and that other fines are not accidentally paid or altered

**Pay**

Total payable balance: **114.80 USD** 

[View Fines and fees full list](#) 

User name: [REDACTED]

Operator name: **Admin, WRLC**

Payment amount\*   Payment method

Transaction ID

Comment

**6. My Institution - Fines and Fees** Locate the Lost item from the resulting list Fines and Fee full list; Select Pay for the specific item you wish to resolve

ACTION: ITEM WAS RETURNED

<p>2 <input type="checkbox"/> <b>Type Overdue fine</b>            Owner Music Library (American University)            Status date 06/09/2023  <input type="radio"/> Active</p>	<p>Title The Harry Smith B-sides.            Item barcode 31194012743914            Creation date 06/09/2023            Comment Date generated: 06/09/2023            Due: 06/07/2023            Fine Policy/ies: Overdue fine policy: 1.20 Open Days            Overdue Fine            Action: Item was returned</p>	<p><b>2.40 USD</b>  <input type="button" value="Pay"/> <input type="button" value="..."/></p>
<p>3 <input type="checkbox"/> <b>Type Lost item replacement fee</b>            Owner American University Library            Status date 03/17/2026  <input type="radio"/> Active</p>	<p>Title 100 European horror films / edited by Steven Jay            Schneider.            Item barcode 31194009823315            Creation date 03/17/2026</p>	<p><b>110.00 USD</b>  <input type="button" value="Pay"/> <input type="button" value="..."/></p>

## 7: Process the Payment

1. Confirm that the Lost Replacement Fee is reflecting as expected
2. Use the <Payment Method> drop-down menu to select the desired form of payment
3. Select the desired form of payment from the available options
4. Per your library's policy standards, if required, enter a Transaction ID
5. Per your library's policy standards, if required, enter a Comment
6. Select <Pay>

Title The complete Jack Johnson sessions / Miles

## Pay

User name: ██████████

Operator name: **Admin, WRLC**

Number of fines/fees to be payed: **1**

Total payable amount: **110.00 USD**

Payment amount\*  USD

Transaction ID

Comment

Payment method: **Credit Card**

Search...

Credit Card

EagleBucks

### 8: Confirm Loan Closure After payment:

- A display confirmation notification will publish on the right-hand side of the screen with a confirmation note indicating the item has been successfully paid
- The Loan record will update to Paid and the fine amount will reflect a zero balance
- The item is removed from the patron's active loans list
- The item's process type changes to: Lost and Paid

3	<input type="checkbox"/> Type Lost item replacement fee Owner American University Library Status date 03/17/2026 Closed	Overview FINE Action: Item was returned  Title 100 European horror films / edited by Steven Jay Schneider. Item barcode 31194009823315 Creation date 03/17/2026	Transactions (1) <input checked="" type="checkbox"/> Paid	<input type="button" value="++"/> 0 Loan History
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## What Happens Automatically

When configured correctly and applied to Alma-native lost loans:

- The loan is closed
- The item is no longer associated with the patron
- The replacement fee is recorded as paid
- The item remains in a non-circulating lost status

## Frequently Asked Questions

- *Why didn't the item disappear from the patron's account after payment?*
    - The **close\_paid\_lost\_loan** parameter may not be enabled, or the item may be a migrated lost loan.
  - *What does "Lost and Paid" mean?*
    - The patron has paid for the item, and the loan is closed without requiring return.
  - *Can the item still be returned later?*
    - Yes. If returned, staff may need to:
      - Adjust or refund fees
      - Update item status manually
- 

## 0% Lost Item Replacement Fee Refund Ratio

**NOTE: To maintain compliance with WRLC Alma Fulfillment Network (AFN) Lending agreed practices, the WRLC FN Lending Terms of Use (TOU) Lost Item Replacement Fee Refund Ratio policy must be configured to 0%.**

**Configuring this policy to 0% ensures that replacement fees paid for lost items are not automatically converted into patron account credits if the item is later returned in Alma.**

**Because credits generated from returned Lost and Paid items are treated differently from standard fines and fees in Alma, they cannot always be removed or waived through normal staff workflows. For WRLC FN Lending TOUs, the Lost Item Replacement Fee Refund Ratio policy must therefore remain configured to 0%.**

1. Item ages into Lost status or is manually updated to Lost by library staff
2. Patron pays the replacement fee
3. Loan status changes to Lost and Paid
4. Patron later returns the item
5. Alma evaluates the return against the configured Lost Item Replacement Fee Refund Ratio policy
6. Item status changes to Item in Place
7. Alma automatically posts a credit/refund to the patron account based on the configured refund ratio policy

If a library has configured the <Lost Item Replacement Fee Refund Ratio> to 100%, then the full Lost Item Replacement Fee Refund will appear as a credit on the patron's account if the item is paid then returned at a later date.

User Details <span style="float: right;">Toggle Account Type Open For Update Cancel Save

AdminAC, WRLC

ID 18079176240004102 Account Type External Identity Service Not Used  
 Record type Staff User group wrlc user Owner 01WRLC\_DOC

General Information Contact Information Identifiers Notes Blocks Fines/Fees Statistics Attachments Proxy For History

Active balance	-110.00 USD	Disputed balance	0.00 USD	Transferred balance	0.00 USD
Currently filtered balance	-110.00 USD	Currently filtered disputed balance	0.00 USD	Accrued fines	0.00 USD

1 - 1 of 1 Title [ ] 0 rows selected Waive All Waive Selected Add Fine or Fee

Fine/Fee types: All Status: Active Fee Owner: All

Creation Date	Fine/Fee types	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance
05/11/2026	Credit	Active	05/11/2026	-	American University Library	Re-reading Harry Potter / Suman Gupta.	3119400867...	-110.00 USD	-110.00 USD

If this is not the desired configuration, then the <Lost Item Replacement Fee Refund Ratio> should be configured to a zero amount.

## Configure Refund Ratio from 100% to 0%

### 1. Navigate to: Configuration> Fulfillment> Physical Fulfillment> Terms of Use and Policies

- Set <Terms of Use Type> to Loan
- Locate the desired TOU (for example: WRLC FN Lending)
- From the row action menu, select Edit

Terms of Use Management

41 - 59 of 59 Name [ ]

Terms Of Use Type: Loan

Name	Type	TOU Owner	Description
41 7 Day Not Renewable	Loan	Institution	-
42 7 Day VRC	Loan	Institution	No Community Impact Fee or Overdue Fee on any item from the VRC
43 7 Days Equipment	Loan	Institution	7 Days Equipment
44 7 Days Games	Loan	Institution	-
45 AU Test Loan	Loan	Institution	AU Testing
46 Adjunct Faculty Laptop	Loan	Institution	-
47 Admin Accounts - No Fines	Loan	Institution	-
48 Borrowed from SUNY	Loan	Institution	16 week loan with no renewal
49 Campus Use Everyone Else	Loan	Institution	Created to change Primo Display - coupled with loan rule in Media FU of same name
50 Default terms of use	Loan	Institution	Allow CLS loans
51 End of Term Faculty	Loan	Institution	End of Term Faculty
52 In Library Use Only - Periodicals	Loan	Institution	To be used for shared periodicals and any others that can be requested for "In Library Use Only"
53 Music Compact Disc 7 Days for Students	Loan	Institution	-
54 NCIP Lending	Loan	Institution	-
55 Non-circulating	Loan	Institution	-
56 Semester-use Lockers	Loan	Institution	-
57 User groups not eligible to borrow	Loan	Institution	-
58 WRLC FN lending	Loan	Institution	Terms for lending in the CLS fulfillment network

Red arrows point to the 'Edit' button in the action menu for row 58 and the '...' button in the same row.

### 2. Add a new Lost Item Replacement Fee Refund Ratio policy, from the <Terms of Use Policies> menu:

- Locate Policy Type: <Lost Item Replacement Fee Refund Ratio>

- From the action row drop-down menu, select Add Policy

Terms of Use Management

Terms of Use Details

Name \* **WRLC FN lending**

Description Terms for lending in the CLS fulfillment network

Terms of Use Policies

Policy Type	Policy Name	
1 Is Loanable	Loanable (Loanable)	...
2 Is Recalable	Recall Allowed (Recall is possible)	...
3 Due Date	6 wk general loan (6 week general loan)	...
4 Requested Item Due Date	14 day limit if request exists (Limit new loans to 14 days if another request on the same ite)	...
5 Recall Period	14 Days Recall Period (14 Days Recall Period)	...
6 Renewal Fee	No Renewal Fee (Default No Renewal Fee)	...
7 Lost Item Fine	No Lost Item Fine (Default Lost Item fine - per RSAC 10/5/2022)	...
8 Lost Item Replacement Fee	CLS \$110 replacement fee (Default replacement fee for WRLC FN Lending TOU 8/20/2018)	...
9 <b>Lost Item Replacement Fee Refund Ratio</b>	100 Percent Lost Item Refund (Default lost item replacement refund)	...
10 Maximum Fine	CLS \$25 maximum fine (Max fine for WRLC FN Lending TOU 8/20/2018)	Add Policy
11 Overdue Fine	CLS no overdue fine (Daily overdue fine removed 4/15/2019)	Edit
12 Recalled Overdue Fine	CLS \$5/day recalled item fine (Overdue fine for recalled items for WRLC FN Lending TOU 8/	Duplicate

### 3. Configure the new policy, on the <Policy Details> page:

- Enter new Policy Name <0% Lost Item Replacement Fee Refund Ratio>
- Enter a Policy Description if desired
- In the <Value (between 0-100%)> field enter 0
- If appropriate to library policy, set <Default Policy> = True
- Select Save

Policy Details

Policy Type **Lost Item Replacement Fee Refund Ratio**

1 Policy Name \* **0% Lost Item Replacement Fee Refund Ratio**

2 Policy Description **No Refund for Returned Lost-and-Paid Items**

3 Value (between 0-100%) \* **0**

4 Default Policy  False  True

Cancel Save

### 4. Apply the new policy using the Policy Name drop-down menu, select the newly configured <0% Lost Item Replacement Fee Refund Ratio>; select Next

Terms of Use Management 1 2 Cancel **Next**

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Terms of Use Details

Name \*  2

Description

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Terms of Use Policies

Policy Type	Policy Name	
1 Is Loanable	Loanable (Loanable)	...
2 Is Recalable	Recall Allowed (Recall is possible)	...
3 Due Date	6 wk general loan (6 week general loan)	...
4 Requested Item Due Date	14 day limit if request exists (Limit new loans to 14 days if another request on the same item)	...
5 Recall Period	14 Days Recall Period (14 Days Recall Period)	...
6 Renew Fee	No Renewal Fee (Default No Renewal Fee)	...
7 Lost Item Fine	No Lost Item Fine (Default Lost Item fine - per RSAC 10/5/2022)	...
8 Lost Item Replacement Fee	CLS \$110 replacement fee (Default replacement fee for WRLC FN Lending TOU 8/20/2018)	...
9 Lost Item Replacement Fee Refund Ratio	0% Lost Item Replacement Fee Refund Ratio	1 → <input type="text" value="-"/>

**5. Save the updated Terms of Use** on the Terms of Use Confirmation page, confirm that the <Lost Item Replacement Fee Refund Ratio> policy has been updated; select Save

Terms of Use Confirmation 1 2 Cancel Back **Save**

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Policy Type	Policy Name	Policy Description
1 Is Loanable	Loanable	Loanable
2 Is Recalable	Recall Allowed	Recall is possible
3 Due Date	6 wk general loan	6 week general loan
4 Requested Item Due Date	14 day limit if request exists	Limit new loans to 14 days if another request on the same item.
5 Recall Period	14 Days Recall Period	14 Days Recall Period
6 Renew Fee	No Renewal Fee	Default No Renewal Fee
7 Lost Item Fine	No Lost Item Fine	Default Lost Item fine - per RSAC 10/5/2022
8 Lost Item Replacement Fee	CLS \$110 replacement fee	Default replacement fee for WRLC FN Lending TOU 8/20/2018
9 Lost Item Replacement Fee Refund Ratio	0% Lost Item Replacement Fee Refund Ratio	-

Revision #5

Created 17 March 2026 19:51:57 by Angelique Carson

Updated 13 May 2026 17:47:42 by Angelique Carson