Chapter 3 - Checkout and Checkin

Checkout

Regular circulation: circulation of items in the regular collection.

Pre-cataloged circulation: circulation of items that have a barcode but have not yet been cataloged. These items may be checked out and then sent to cataloging when returned.

Non-cataloged circulation: circulation of items that are not in the catalog and do not have a barcode.

Record In-House Use: circulation of items that may be checked out by patrons but do not leave the library.

1) To check items out to a patron, begin by accessing the Circulation menu and selecting Check-Out.

2) Using your mouse, place the cursor in the light green “Enter Barcode” box and scan the patron’s library card barcode.

3) Although all patron’s must have their library card with them to check out materials, you can also retrieve a patron by searching the patron database. You can select “Search” and “Search for Patron” to obtain the patron record.
4) Highlight the desired patron and choose Retrieve Patron. After the patron is retrieved, the check out screen will appear. Any staff alerts about this patron will also appear at this time.
5) The left pane gives an overview of the patrons account. This will include any Bills, overdue books, etc.

6) To begin checking items out, place the cursor in the green “Barcode:” box and begin scanning items.
   a. Items will begin to appear in the right pane as they are checked out.
7) After you are finished checking out items, click “Print Receipt” followed by “done” or select “Auto-Print” and click “done”.

**Pre-cataloged Items**

Pre-cat items are those items that have not be added to the database or interlibrary loans from non-Evergreen libraries.

**Checking out pre-cataloged items from the check out screen:**

1) Scan the item barcode.
2) An alert will appear stating: *Mis-scan or non-cataloged item*.
3) To continue with check out, click Pre-cataloged.
4) Enter title and author information and click Checkout.
   1. When checking out an ILL from a non-Evergreen Indiana library, edit the item’s title when entering the pre-cat record to include "ILL-No Renewals" as part of the title.
5) Item is added to the list of Check Outs
Non-cataloged Items

Non-cataloged items may be more familiar as *Ephemeral* items – they are those items that libraries do not wish to catalog, but do wish to track for circulation statistics.

These items are checked out with a due date but when the due date expires, the items disappear from the patron's record.

No fines accrue on non-cataloged items but circulation statistics are collected.

Checking Out Non-cataloged Items from the Check Out screen

1. Click Check Out button or hit **F1** to access *Retrieve Patron by Barcode*.
2. Scan patron barcode.
3. The Patron Account opens to Check Out function tab.
4. Click on Barcode to open the non-cataloged items selection list.
5. Click the type of item, such as Paperback Book; the box for the barcode will become grayed out and labeled *Non-cataloged*.
6. Click Submit.
7. In the pop-up, enter the number of items being checked out.
8. Click OK.
9. The items are added to the Check Out list with a normal due date.
   1. Non-cataloged items do not appear in the list of items out unless you select that option in the column picker.
10. Click OK.

In-house Use (**F6**)  

May be used to record in-house use for both cataloged and non-cataloged items. Example:

Computer usage

1. Select Circulation → Record-In House Use
2. Cataloged items: Enter item barcode. When recording more than one use of an item, edit the number in the # of uses box.
3. Non-cataloged items: choose the appropriate item from the dropdown menu in the Barcode box and Submit.

The statistics on in-house use are separated from circulation statistics. In-house use count of cataloged items is not included in the items' total use count.

Due Dates

Circulation periods are pre-set. When items are checked out, due dates are automatically calculated and inserted into circulation records if the Due Date is set Normal on the Check Out screen. Different due dates may be set to override this circulation period.

This process will allow staff to set a non-standard loan period prior to scanning the item in Check Out.
1. Click Check Out button or hit F1 to Retrieve Patron.
2. Scan the patron barcode.
3. Scan the item barcode
4. In the box labeled Normal, select a pre-set loan period from the list; OR Highlight Normal and type a specific date in YYYY-MM-DD format
5. The item is checked out with the special due date.
6. The special due date applies to all subsequent items until it is changed or the patron record is exited.

**Renewal and Editing an Item’s Due Date**

Checked-out items can be renewed according to library policy. The new due date is calculated from the renewal date. Existing loans may be extended to a specific date by editing the due date.

**Renewing items**

1. Retrieve the patron record.
2. Items Out screen.
3. Select item(s) to renew.
4. Select Actions for Selected Items → Renew.
5. To renew all items in the account, click Renew All.
6. To view the new due date, click Refresh.

Renewal may also be done from the Items Status screen.

**Editing the due date of items**

1. From the patron record, open Items Out tab
2. Highlight the item, right click, and select Edit Due Date
3. To update multiple items highlight the first item, press and hold Ctrl, highlight additional items
4. In the pop-up, enter the new due date.
5. Click OK.
6. Click Refresh to update the list.

Select multiple items by pressing down the CTRL key and clicking each item to edit.

Editing the due date does not affect renewal count.
Item Check-In

1) To check items into the library and into Evergreen begin by accessing the Circulation menu and select Check-In Items.

2) Using your mouse, place the cursor in the light green “Enter Barcode” box and begin entering barcodes using your barcode scanner.

3) Items will begin to appear below as they are checked in.

4) When checking in materials, it is VERY IMPORTANT to watch the screen as each barcode is scanned to be sure the scan is registering and to be aware of on-screen messages and directions.
### Check In / Process Item

<table>
<thead>
<tr>
<th>Alert Message</th>
<th>Author</th>
<th>Barcode 1</th>
<th>Barcode 2</th>
<th>Check In Date</th>
<th>Location 1</th>
<th>Location 2</th>
<th>Route To</th>
<th>Status</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rabbit, Peter</td>
<td></td>
<td>123456</td>
<td>12345</td>
<td>2021-09-20</td>
<td>Shelby</td>
<td>STRE-BHEL</td>
<td>In transit</td>
<td></td>
<td>Lost on a great adventure</td>
</tr>
<tr>
<td>Jim Jones</td>
<td></td>
<td>123458769</td>
<td>Not Cataloged</td>
<td>2021-09-20</td>
<td>Shelby</td>
<td>PMRL-RC</td>
<td>In transit</td>
<td></td>
<td>NASCAR</td>
</tr>
</tbody>
</table>
Backdating Check-ins

1) To Backdate check-ins, change the date in the Effective Date screen to the date on which you would like the items checked in. You will notice that the Check-in screen changes to red and says Backdated. You must change the Effective Date back to the present in order to get back to the normal Check-in screen.

2) When checking in items from the book drop each morning, staff should set the Effective Date to reflect the previous day’s date. Other dates may be selected if the library has been closed; however, the system will not accept a future date.
Checking-in Items with Amnesty Mode

Checking-in with Amnesty Mode will forgive any fines that may have been applied to the items being checked-in. You can access Amnesty Mode by clicking on Checkin Modifiers at the bottom of the screen and choosing Amnesty Mode. Amnesty Mode will remain turned on until you manually turn it off. To turn it off, go to Checkin Modifiers and choose Amnesty Mode again.

Checking in pre-cataloged items

The item MUST be routed to your holdings maintenance staff to be added to the database before further check outs.

1. Scan the item barcode.
2. An alert will appear stating: "This item needs to be routed to Cataloging"
3. Click OK.
4. The item is added to the list of Check Ins, marked with: [barcode number] needs to be cataloged, Route To location = Cataloging and Status = Cataloging
Viewing Recent Item Circulations

To view recent circulations for a particular item start by accessing the Circulation Menu and clicking Show Item Status By Barcode.

Item Status

From the Item Status window scan or type the barcode of the item you wish to view circulation information on.
After entering the barcode, click on Actions for Selected Items and Show Last Few Circulations.
Circulation History

The following screen will show the three most recent circulations for the item.
If the item was returned damaged, lost, etc., staff can retrieve the last patron to circulate the item and add a bill.

![Bill Patron Wizard](image)

<table>
<thead>
<tr>
<th>Summary</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill #</td>
<td>1392</td>
<td>Total Billed</td>
<td></td>
<td>Title</td>
</tr>
<tr>
<td>Type</td>
<td>circulation</td>
<td>Total Paid</td>
<td></td>
<td>Checked Out</td>
</tr>
<tr>
<td>Start</td>
<td>2008-08-20T10:05:49</td>
<td>Balance Owed</td>
<td></td>
<td>Due Date</td>
</tr>
<tr>
<td>Finish</td>
<td></td>
<td>Renewal?</td>
<td></td>
<td>Checked In</td>
</tr>
</tbody>
</table>

**Create Bill**

- **Location**: Auburn Public Library
- **Transaction Type**: Circulation
- **Billing Type**: Damaged material
- **Amount**: $16.54
- **Note**: Book was left in the rain.