

Circulating Items

Finding, Checking Out, Checking In, and Fine Free!




Can you help me find
Walker Texas Ranger?

Confidentiality

- Remember to treat all customer inquiries & account information with confidentiality.
- Having the library card number, or picture ID associated with the account (guarantor's ID for youth) is sufficient to give account information.
- Customer should bring picture ID to branch if they've lost their card.
- The following document goes into more detail about account [confidentiality and privacy](#).

The Reference Interview


Possible Questions to Ask:



Do you need it immediately?
Yes, it's an emergency!

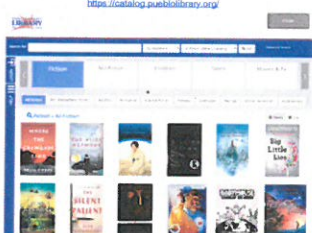
Do you have a Blu Ray player?
What's that?

Do you have internet at home?
Yes, on my cell phone.

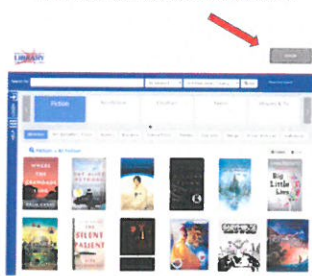


OPAC-Online Public Access Catalog

<https://catalog.publiblibrary.org/>

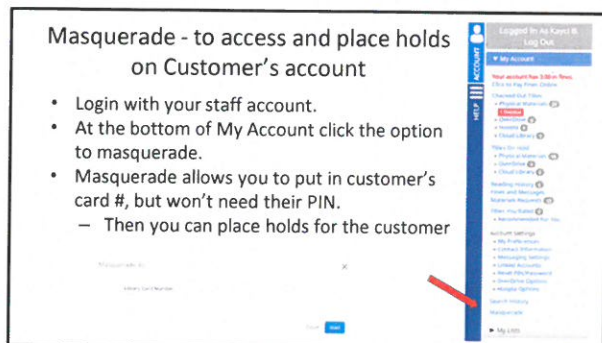


LOGIN to Access Account

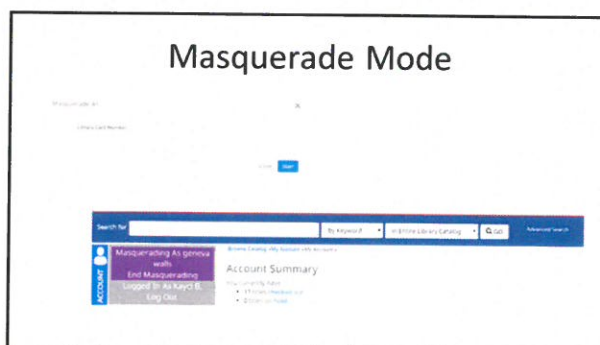


Masquerade - to access and place holds on Customer's account

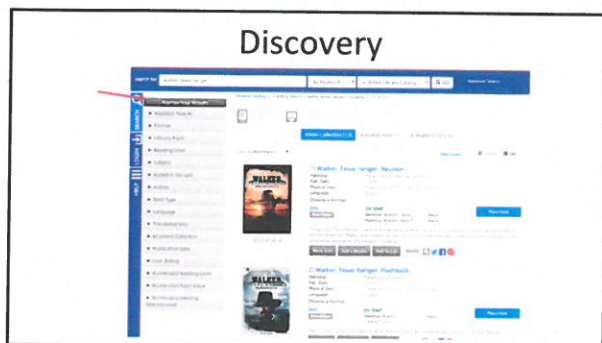
- Login with your staff account.
- At the bottom of My Account click the option to masquerade.
- Masquerade allows you to put in customer's card #, but won't need their PIN.
 - Then you can place holds for the customer



Masquerade Mode

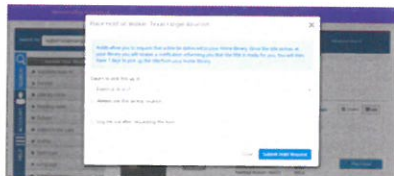


Discovery



Place Hold

Click Place Hold on item wanted and follow prompts.



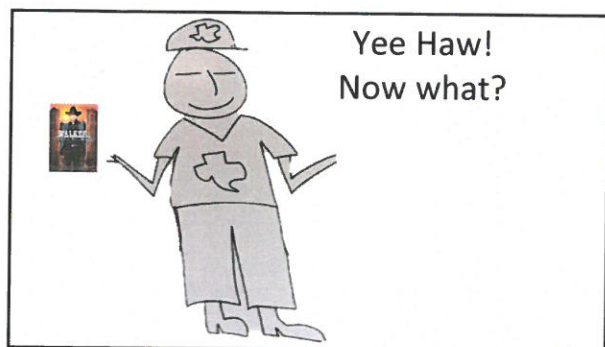
In-Transit Delivery between branches

- If people want that day they may want to go to branch where it is at.
- Call that branch to make sure item is there before sending customer (catalog isn't always right!)
- If customer can wait tell them they will be notified
- If checked-in transit items will *typically* be there 2 business days.

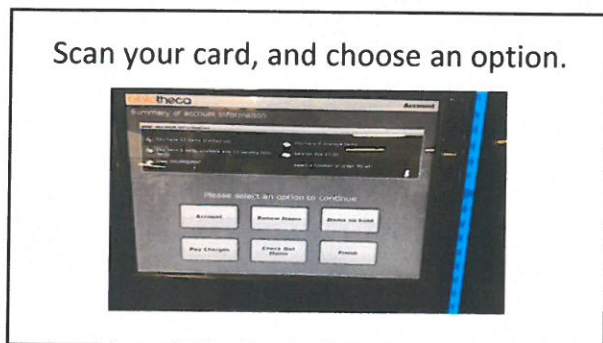
Log Out

- Make sure to log out, and or remind customer to log out when done searching.
- End Masquerading when done helping customer.









Place multiple items in check out box.



Checking Out in Koha



Specify Due Date



Use Pad to Deactivate Security

- Using the RFID pad to checkout ensures the security is deactivated and the gates won't beep.
- If the gates beep call the customer back and check the IPAD
 - Red it's not checked out
 - Green it is checked out



Using RFID Pad

- Open bibliotheca Circ Manager and choose the check in (shelf) or out button (door)
- Put cursor in field
- Place item on pad





Let me help you return it!



Automatic
Material
Handling


Weeeeeeeee!



Sorts into Bins



Checking in Koha




Check in message
02229315151517 The user

Means it's staying at your location

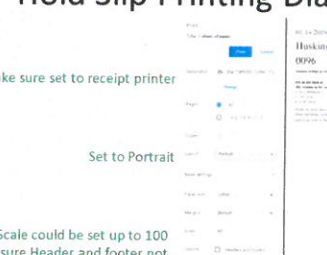
Transferring and Holds

- Check the Route/Transit to for the status of the returned item.
 - Discard/Withdrawn – weed the item
 - Cataloging, Techbase, or No longer in the Record – send to TS
 - Holds



Hold Slip
02229315151517 An obvious fact!

Hold Slip Printing Dialog Box



Make sure set to receipt printer

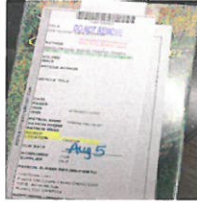
Set to Portrait

Scale could be set up to 100
Make sure Header and footer not checked

Interlibrary Loan

1. Write on the label "Returned"
2. Send to Circ at Rawlings
3. If at Rawlings, place the item on the ILL shelf in the Circulation work area.

— When items are not picked up, send them to Circ with "Not Picked Up" written on the label.



Tablet & Hotspots Special Handling

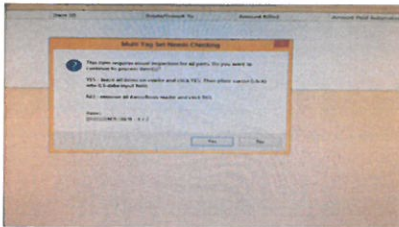
- Checking Out- Make sure is working, good condition, has charger, must be Adult card.
- If late \$5/day up to \$50
- Returns— Turn on Device, check for damage, make sure it has the charger

Damaged, Incomplete, or Unknown

- If a customer reports damage, or if missing the disc. Put a post it on the item and leave for staff.



Missing Disc Pop Up Message



Renewing

- Customers can't renew themselves, it's set for automatic renewal, but staff can do it.

2. Click the boxes of each item to renew or select all

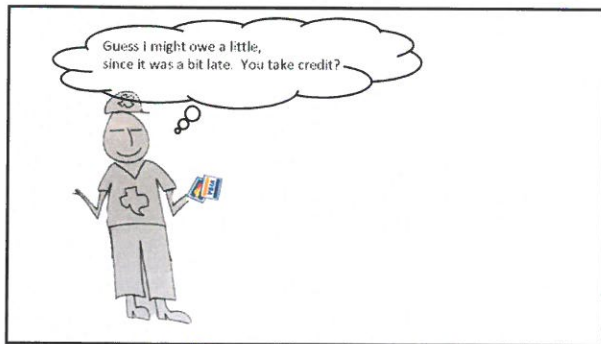
Item #	Title	Barcode	Author	Editor	Language	Format	Due Date	Renewal Date	Renewal Status	Renewal Button
10000000000000000000	THE GREAT GATSBY	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	Renew
10000000000000000000	THE GREAT GATSBY	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000	Renew

3. Can set the renewal date if needed
4. Click Renew selected Items Button
1. Click the override renewal button at bottom of checkouts (this will get you boxes under renewal column)


Claims Return

Customer's sometimes have items on their account that they "claimed to have returned". Follow these steps...

- 1) Ask "Which branch do you think you returned the item to"
- 2) If they say it was the branch you're at, go check the shelf for the item making sure it's the same copy (i.e. check the barcode)
 - a) if found on your shelf, make sure to change the check in date in Koha so it's before the due date utilizing the check in settings.
 - b) If **not found and not late**, renew items and ask them to check one more time
- 3) If returned to another branch fill out the [customer resolution form](#) and forward to that branch manager, or call the other branch and have them look
- 4) If the item can't be found, and customer has looked again at home follow these instructions <https://docs.google.com/document/d/1QsrgFWawslGJgoErjXKpeshVFPd-082KqslMSQHQR0/edit?usp=sharing>




PCCLD is Fine Free!



- Providing equitable access to our community.
- Reducing barriers to all library services.
- Increase in circulations, visits, programs, and computer use.
- Reduction in staff time and increase in staff efficiency.
- Increase in materials returned to the shelf.
- For more information check out the [Fine Free Cheat Sheet](#)

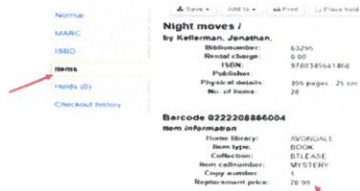
Lost Items



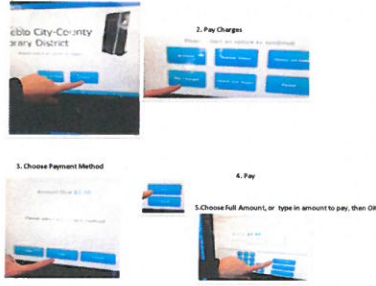
- Lost Items -The item will be billed as lost at 30 days and they will receive a bill in the mail at that time. If they return their items, the lost fee will be taken off of their account, but the processing fee remains just as it does now. (Please work with your managers on a case by case basis if processing fees are disputed.)
- Collections Process - If customers do not return their items and they are billed over \$50, they will move through the collections process with Wakefield. Click on the link for more detailed information on the [collections processes](#).

Lost or Damaged Items

- If a customer loses an item they must pay the price of the item, plus a \$5 processing fee.



How to pay fines (over \$2) on the Self Check with a Credit Card



6. Give the Pillsbury Dough Boy a tickle (touch the CC screen).



7. Use the stylus, and touch YES.



8. Magnetic strip faces up, and swipe right to left, or use chip.



9. Sign using the



To Bill Customer set item to Lost

The screenshot shows a library system interface. At the top, there's a 'Items' section with a red arrow pointing to the 'Items' link. Below it, there's a 'Checkout History' section. The main part of the screen displays item details for 'Barcode 0222091025148'. The details include:

- Barcode: 0222091025148
- Item information:
 - Barcode: 0222091025148
 - Item type: [D45]
 - Item category: [D45]
 - Item number: [D45]
 - Barcode: 0222091025148
- Item status:
 - Current location: [D45]
 - Check-out status: [D45]
 - Current location: [D45]
 - Lost status: [D45]
 - Item status: [D45]
 - Item status: [D45]

 A red arrow points to the 'Lost' button in the 'Item status' section.

Replacement Item

- Customer can provide a BRAND NEW copy of the exact same thing.
 - Always follow the Replacement Item instructions located here <http://portal.pueblolibrary.org/document/process-accepting-replacement-item>

Paying Bills

- Should be done in Checkout Station, but if paying with check must be done in [Location]

The screenshot shows a library system interface. At the top, there's a 'Paying Bills' section with a red arrow pointing to the 'Paying Bills' link. Below it, there's a 'Checkout History' section. The main part of the screen displays a table with columns: 'Account', 'Pay From', 'Create manual invoice', and 'Create manual credit'. Below the table, there's a section for 'Pay an amount toward selected bills' with a 'Total amount' of \$1.00 and a 'Check from' of \$1.00. A red arrow points to the 'Pay' button. Below the 'Pay' button, there's a note: 'There should be a carbon copy receipt book at all locations that you fill out whenever you take a check and include one of those copies with the check.'

Refer all Requests for Fine Forgiveness to Manager

- If manager is unavailable, have them fill out [customer resolution form](#), and give form to your Manager.

Document type	Search	Sort by	View	2018
Documents	Document type	Documents	Documents	Documents
Customer Resolution Form	Forms for Customer Issues	200		
Working Paper Policy	Forms for Customer Issues	200		
Organizational Legal Processes and Policies	Forms for Customer Issues	200		
Policy - Fine Forgiveness	Forms for Customer Issues	200		
Referral Request Form (R)	Forms for Customer Issues	200		
Resolution Form - Internal Staff	Forms for Customer Issues	200		
Resolution Form - External	Forms for Customer Issues	200		
