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:
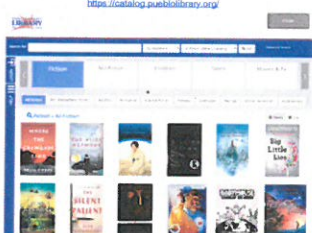
Do you need it immediately?
Yes, it's an emergency!
Do you have a Blu Ray player?
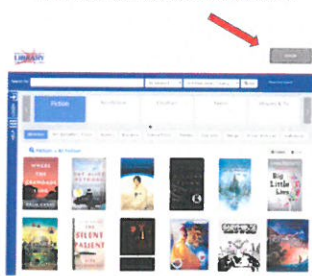What's that?
Do you have internet at home?
Yes, on my cell phone.

OPAC-Online Public Access Catalog

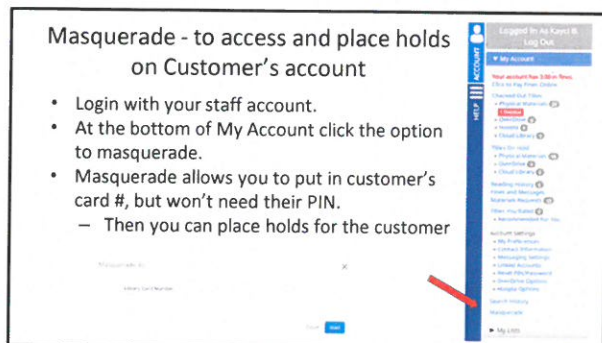https://catalog.pueblolibrary.org/
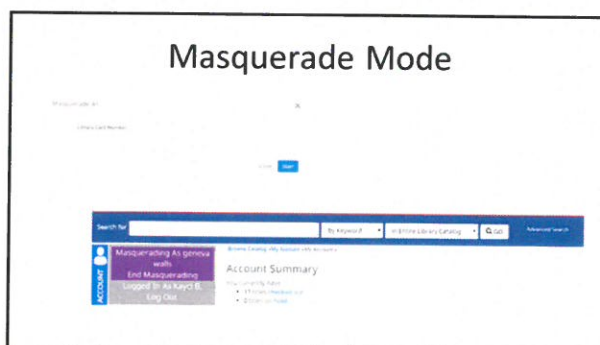

LOGIN to Access Account

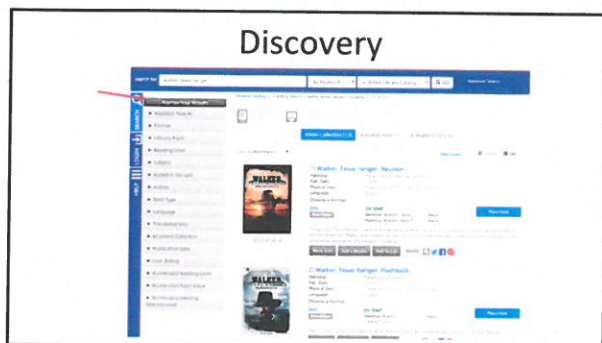### Masquerade - to access and place holds on Customer's account

- 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

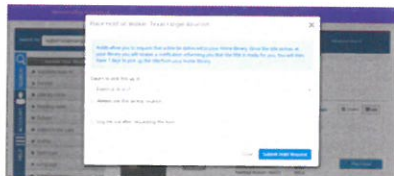## Masquerade Mode

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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
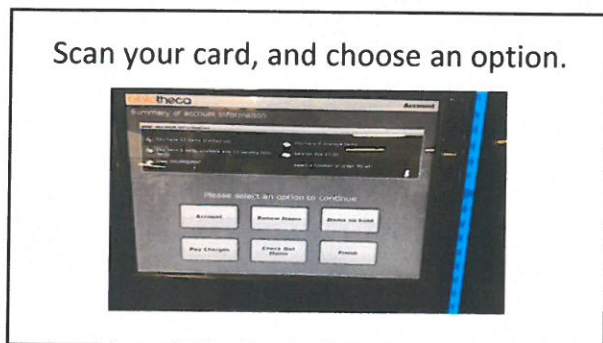- If checked-in transit items will *typically* be there 2 business days.

Log Out

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

Yee Haw!
Now what?

Let me help you check it out!

Scan your card, and choose an option.
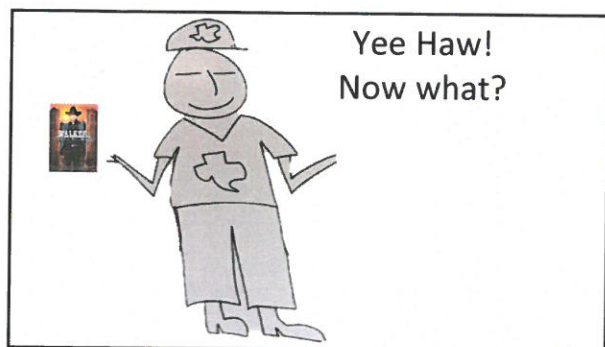
Place multiple items in check out box.

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

Man, that show is awesome. Time to return it. What should I do?

Let me help you return it!

Automatic Material Handling

Weeeeeeee!

Sorts into Bins

Checking in Koha

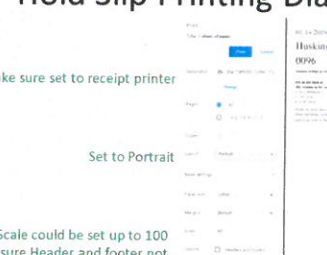Means it's staying at your location

Transferring and Holds

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

Hold Slip Printing Dialog Box
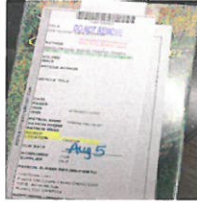
Make sure set to receipt printer

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.
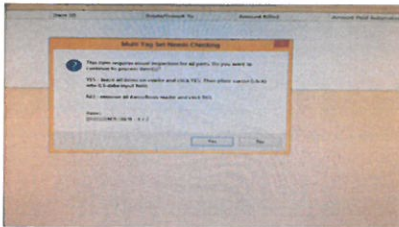
Tablet & Hotspots Special Handling

- 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.

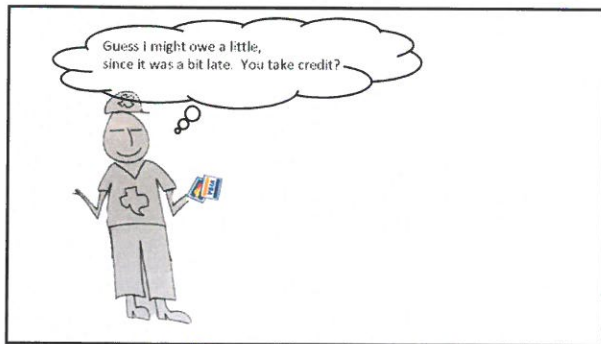2. Click the boxes of each item to renew or select all

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/1QsrgFWawsIGlgoErjIxKPeshVFPd-08ZKqsJMSQHQR0/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.
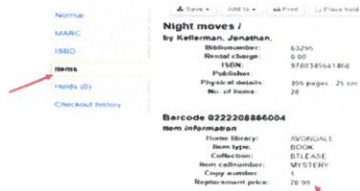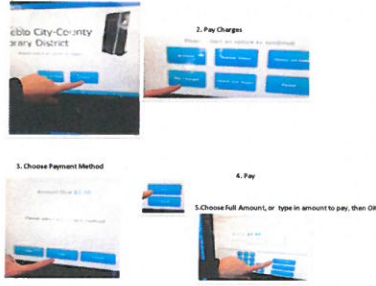- For more information check out the Fine Free Cheat Sheet

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

To Bill Customer set item to Lost

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

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.