Checking Out Items

Basic Checkout Procedure

A normal checkout session would proceed as follows:

1. Staff member opens the Check Out screen (Circulation > Check Out).
2. Patron presents his/her library card (see: Library Card Required for Circulation).
3. Staff member scans card to retrieve account.
4. Staff member determines if patron is in good standing (i.e., not blocked, barred, inactive, exceeding fine limits).
5. Staff member scans barcodes of items presented for checkout.
6. Staff member clicks the "Done" button to prompt printing of checkout receipt.
7. Staff member should verbally inform patron of due dates. (It is good practice to also inform patron of due dates on any items already checked out on the account and to inform the patron of any fines owed.)

Circulation Limits

In most cases, a maximum of 50 items may be charged simultaneously on a PINES card [1999.05], [2002.12]. Some types of accounts, such as Restricted, and lower limits. See User Permission Groups for more information on different patron account types.

Materials circulate for varying periods of time; see the PINES Circulation Matrix for details on circulation rules.

Audio-visual materials (DVDs, games, etc.) are limited to 15 per patron at any given time [2013.05]. This policy supersedes any local limits that previously been used.

Proxy Borrowing

Any user may present another user's card to check out materials. Library staff should remind all patrons at the time a card is issued that they are responsible for all items checked out on that card, and that lost cards should be promptly reported. (See: Lost / Stolen Cards) PINES libraries also have the ability to check out items on hold to an authorized proxy user (often husband or wife), as opposed to the user who originated the hold, while maintaining the integrity of the holds queue.

Policies regarding Proxy Borrowing and procedures for administering this feature are at the discretion of the individual library systems [2001.11]. The authorized proxy is not required to present the originator's card, but the authorization for proxy permission should be noted in the Alert Message field. Because all library records are confidential in nature, PINES library staff must be aware that authorization of the originating user (the person placing the hold) is required for proxy checkout for all persons over 18 years

of age.

Materials placed on hold by juveniles, as with any and all parts of the juvenile's patron record, are accessible and may be checked out by parents or legal guardians without prior authorization.

Checking Out Non-Cataloged Items

Many libraries do not have bibliographic records for paperback books, circulating magazines, or equipment. The non-cataloged circulation function should be used to record a count of these items.

1. Retrieve the patron account as you would for a normal checkout.
2. Click on Barcode to pull down a list of non-cataloged item types.
3. Select the appropriate type of non-cataloged item.
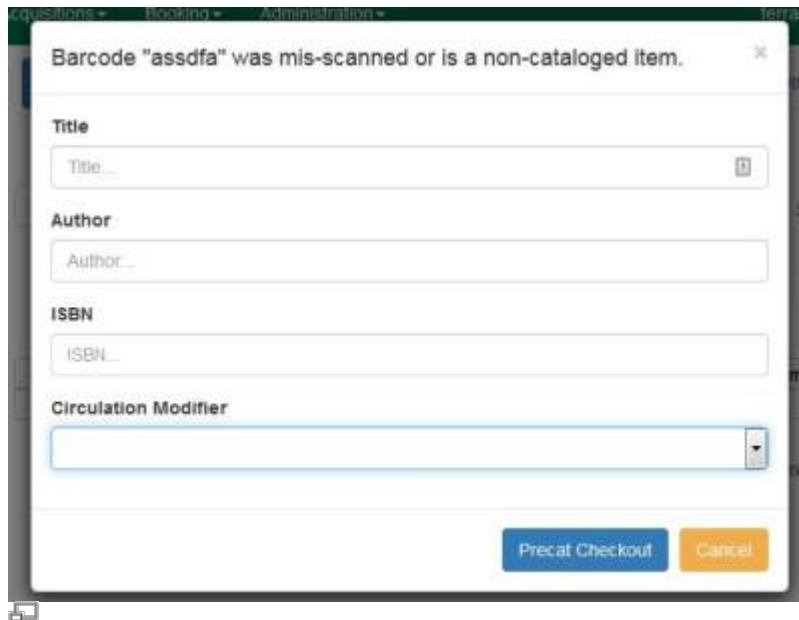4. Enter the number of items.
5. Click Submit.

These items will be checked out on the patron's account and will be given a due date, but will accrue no fines. The patron account will show the non-cataloged items as checked out on the patron's account until the due date has passed and then will be automatically removed from the patron's account. Non-cataloged item types may be configured separately for each library system by the designated LocalAdmin.

Pre-Cats

With the exception of items that are intentionally non-cataloged (see above), all items borrowed by patrons should have a barcode and be checked out through Evergreen. If an item is brought to checkout without a barcode or if the barcode on an item is no longer in the database, it should be added/re-added to the database on the spot, using the pre-cataloged item function to allow its circulation. For non-barcoded items, staff should apply a spare barcode to the item and scan it. Assigning ad hoc/temporary or shortened barcodes is not recommended, as this can cause other items in other libraries to accidentally be scanned. The following screen will appear:

When this message appears when scanning a barcoded item, staff should first attempt to re-scan the item. Many pre-cats are created from mis-scans, which causes problems with tracking and cleanup.

When it is determined that the item's barcode is not in the database, fill out the form.

When the item is returned, it must be forwarded to the Cataloging Department for full entry into the database. Brief records should not remain in the system for more than one circulation. PINES member libraries will be asked to periodically clean up brief records by deleting them or creating full records [2002.05].

- Complete Step-by-Step Instructions for Handling Pre-Cats

Cataloged Items Without Barcodes

If a cataloged item has lost its barcode, staff should apply a new barcode to it before checking it out.

1. Identify the old barcode number by searching the catalog.
2. In Evergreen click Circulation > Replace Barcode.
3. Enter the original barcode and the new barcode.
4. Click Submit.
5. Return to the patron account and check out as normal.

Replace Item Barcode

Enter Original Barcode for Item

Original Barcode...

Enter New Barcode for Item

New Barcode...

Submit

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