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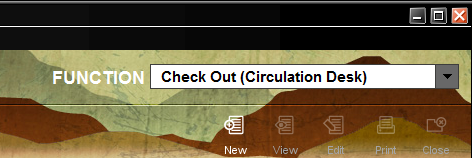
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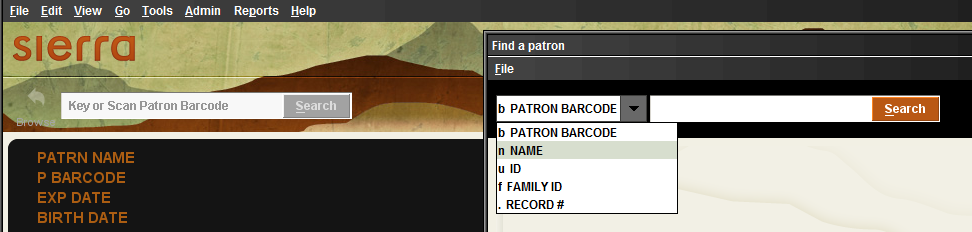
Click on **Check-Out (Circulation Desk)** from the dropdown menu at the upper right corner of the Sierra program.



There are several options to bring up the patron’s record.

1) **Scan** the **patrons’s barcode**. Type in the patron’s barcode number as well.

2) **Type the letter “n”** and the patron’s **lastname and first name**. 

3) Click on the **Seach** box to bring up the **Find a patron** screen. Use the dropdown to either enter the **b PATRON BARCODE,** **n NAME**., **u ID** (unique ID), **f FAMILY ID** or **.RECORD #**. Type the patron’s lastname and first name when using the n Name dropdown.

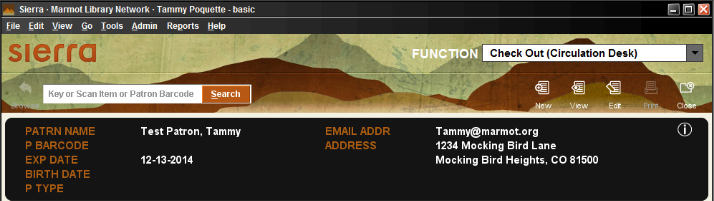
Entering the patron’s barcode or name into the system should retrieve the person’s account. Fields displayed in the patron’s record will depend on the patron template.

**Checking Out Items**

The **P Type** is decided by your library.

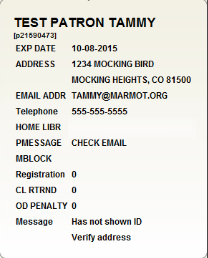
The **P Barcode** would have been **supplied by your library**.

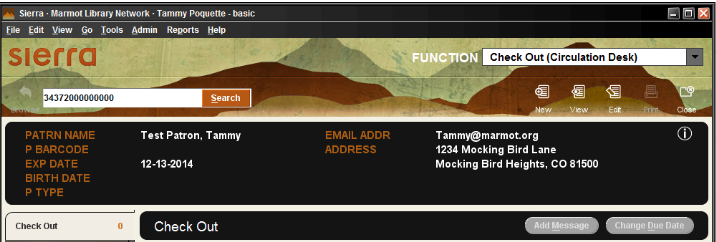
The patron **EXP DATE** is **decided by your library**.

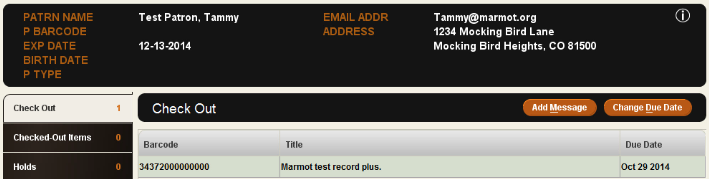


Hint: hovering over the  in the corner of the patron’s account is a quick way to view the patron’s account information. Included will also be any messages or notes that your staff had added. This is one of the ways to see multiple messages or notes on a patron’s account. The other way is to click the Edit button to see the patron’s entire account information. **Tip:** This can be configured to show different information per login. Contact Marmot to make the change.

**This is a sample of what the information box will look like when hovering over the** 



Next, **scan the barcode of the item or items** that the patron would like to check out. 

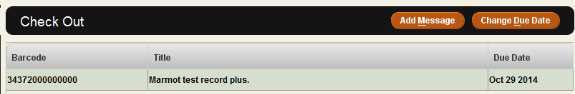
Once the item is scanned, the item’s **barcode, title, and due date** will display on the screen. The information from the item is in the **Check Out** tab.

At this point scan the next item or Change Due Date of the current item. **Note:** the Add Message will add a message to the item. This will not add the message to the patron’s account.

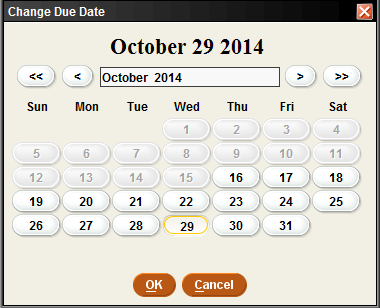
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**Changing the Due Date**

**Change Due Date Button**

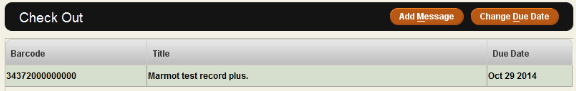
We are going to use the **Change Due Date** to change when the patron can return the item. Changing the due date is a policy issue that may need to be discussed with a supervisor. 

The Change Due Date calendar box will pop-up. **Tip:** clicking on the **>>** or **<<** will **change the year** of the due date. Clicking on the **>** or **<** will **change the month**. You will also need to **click on a specific day to complete the Due Date change**. The October 29 2014 information will remain the same until a new date is picked. While clicking on the arrows, the changes to the date can only be seen in the box containing the October 2014. Click **OK**.

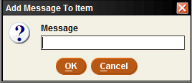


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**Add Message Button (Item Message)**

This will **add a message to the item** and not the patron. 

If staff clicks the **Add Message** this is the screen that will appear. If a message is accidentally put in this field, the message will display during check in. **This field can only be removed by editing the item record.**

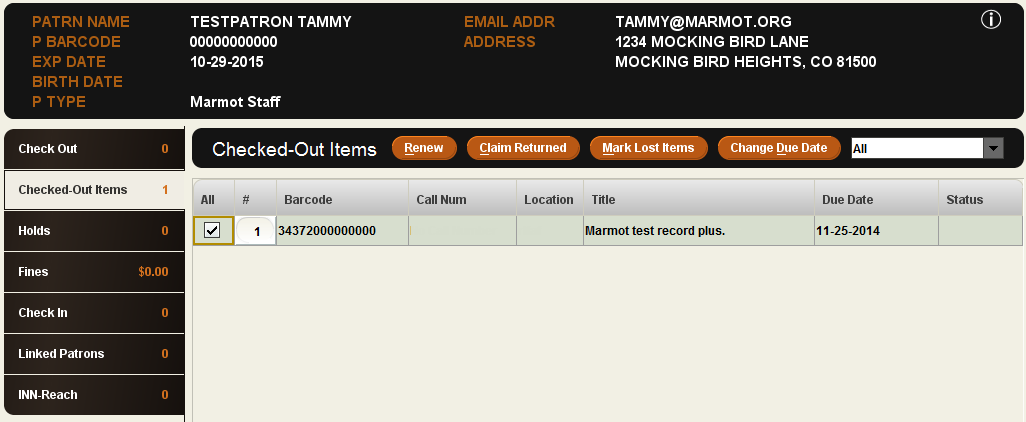


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**Checked-Out Items Tab**

During check out there are other fields on the left side of the patron check out screen under **Check Out**. This is where checked out items, holds and fine can be viewed. A hold or a fine can be added to a patron’s record from these tabs. You can also check in a patron’s books and link patrons.

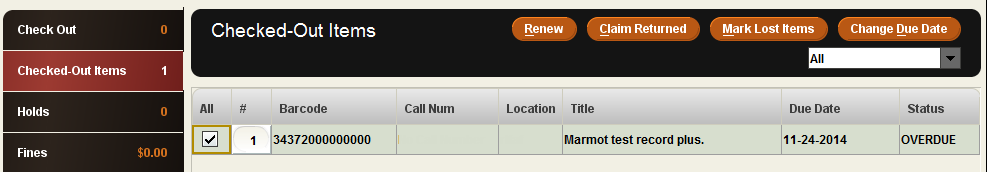
Clicking on **Checked-Out Items** tab will display any items the patron had previously checked out. Included are the item(s) barcode, title and due date. **Renew**, **Claimed Returned**, **Marked Lost Items** and **Change Due Date** can also be done from this tab.



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**Overdue Item**

The **Checked-Out Items** tab will be a different color when an item is **overdue or billed**. Click on the tab see what item(s) is overdue or billed. The **Status** of the item will be **OVERDUE**. Clicking on the box under **All** will give access to **Renew, Claim Returned, Mark Lost Items or Change Due Date.**



A **billed** **item** will have the **Status** of **BILLED** 

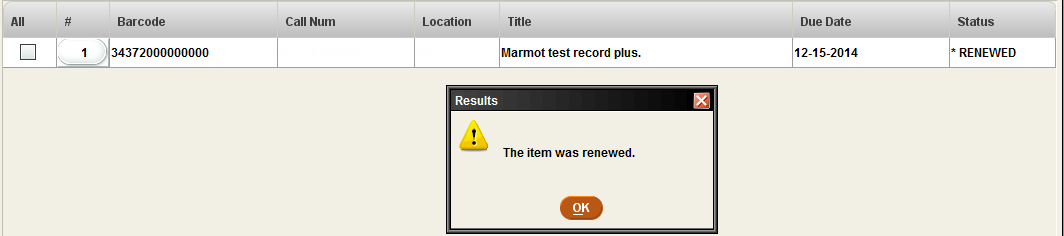
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**Checked-Out Items Tab**

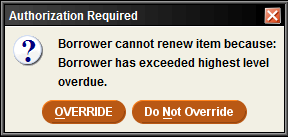
**Renew Button**

Click this button to renew an item a patron had previously checked out. Click **Renew**.

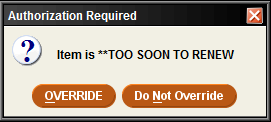


Depending on the due date and the renewal policy for a library, the message **“The item was renewed”** may pop-up. This will also put the word **\*RENEWED** in the **Status** box.

If a patron has tried to renew the book more times than allowed, the following message will pop-up.



If it is too soon to renew the item, the following message will pop-up.



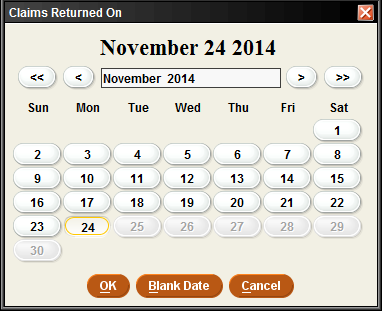
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**Claim Returned Button**

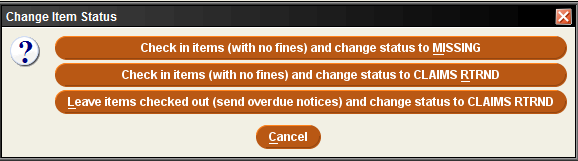
A claim returned can be used when at patron claims to have returned an item that is still checked out on their account. Click on **Claim Returned**.



The **Claims Returned On** calendar will pop-up. Click on the date they claimed to have return the item and click **OK**. If the patron does not remember the date, click the **Blank Date**.



The **Change Item Status** pop-up box will appear. It is best to **click** the **“Leave items checked out (send overdue notices) and change status to CLAIMS RTRND”** button.



The following screen message will pop-up, **“The item was claimed returned.”** The **Status** of the item will change to **CLMS RETD**.



The **patron record** will have a number listing for each **CL RTRND** (Claim Returned).

The **item** will have the **STATUS** of **z CLMS RETD**.

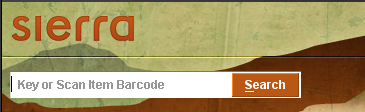


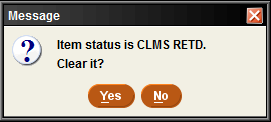
The item will also have an **INT. NOTE** (internal note) stating when the book was marked Claims Returned, and date (unless you choose Blank Date on the calendar) and the patron number.

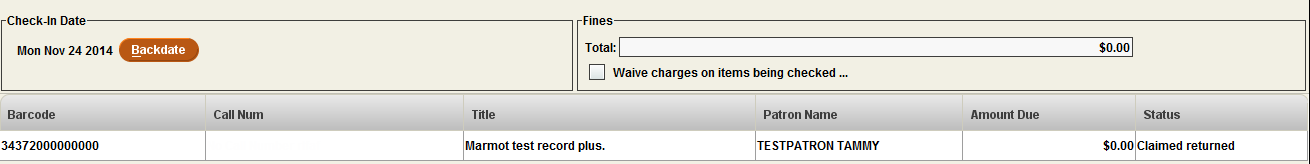
If the book is found by your staff or the patron, you would check the book in using the **Check-In (No Patron)** function.



**Scan the barcode** of the item.



The following message will pop-up, **“Item status is CLMS RETD. Clear it?”** Click **Yes**.

Clicking **Yes**, the following screen will display the the **Status** as **Claimed returned.** 

The item **STATUS** changed from CLMS RETD to **– ON SHELF**. The INT. NOTE will be gone from the item.



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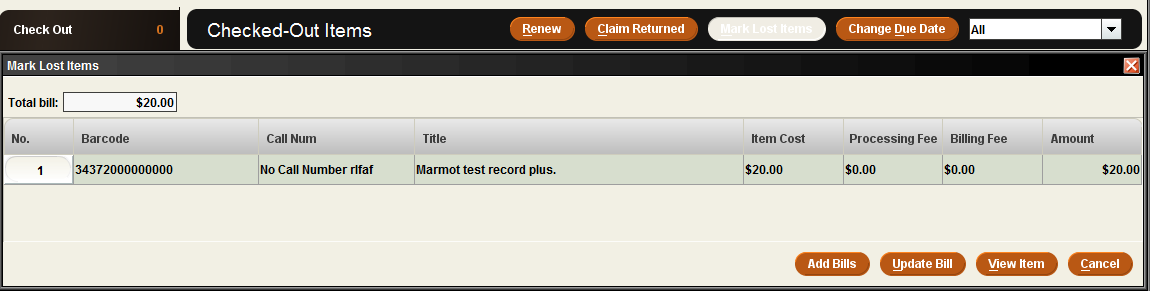
**Mark Lost Items Button**

Mark Lost Item can be used when a patron has lost the item that is still checked out on their account.

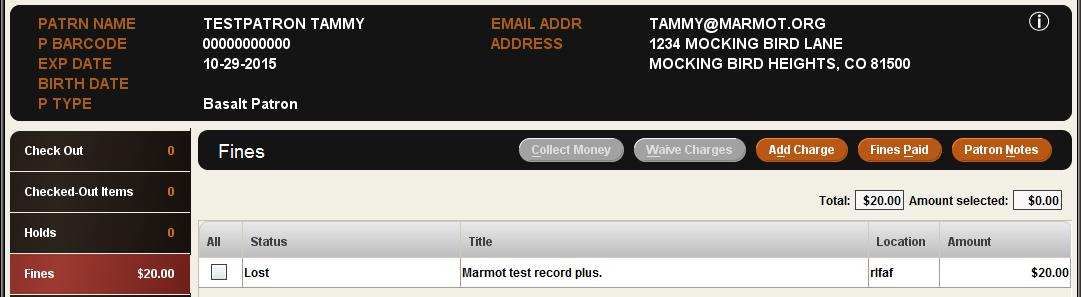
Click **Mark Lost Items**.



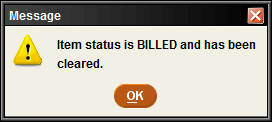
Clicking on the **Mark Lost Item** button the **Mark Lost Items** pop-up box will appear with the **Item Cost**, **Processing Fee**, **Billing Fee** and **Amount**. Click **Add Bills**, **Update Bill**, **View Item** or **Cancel**.



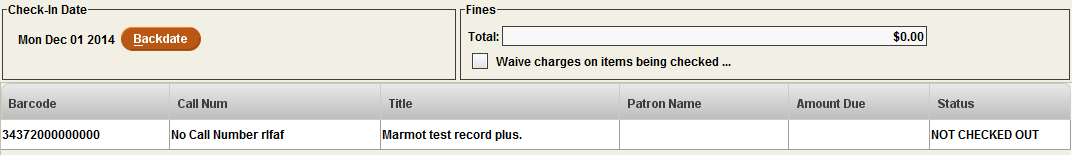
Clicking on **Add Bills** will put the amount in the Fines tab of the patron’s record. The **Status** of the item will change to **Lost**.



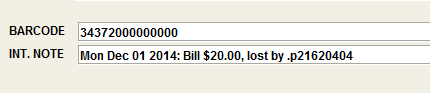
If the item is found by the patron or your staff, you will get the following message during Check In. Click **OK**.



This will change the item’s **Status** from **Billed** to **Not Checked Out**.



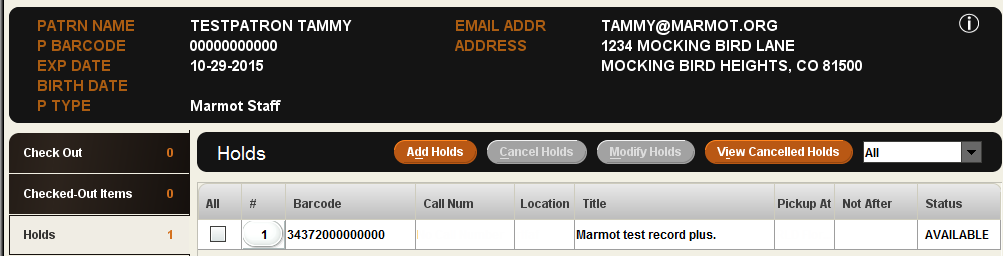
The **INT. NOTE**. (Internal Note) may still be in the item record. This note may need to be deleted manually.



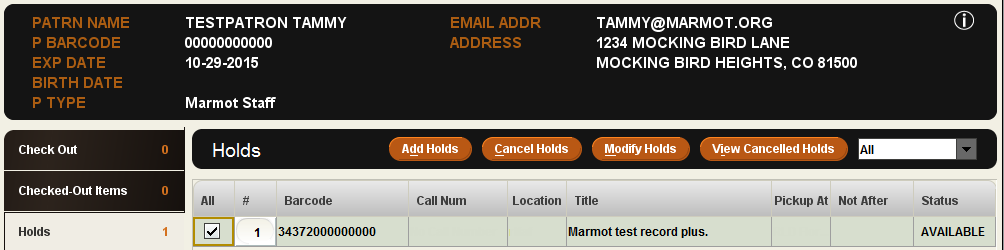
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**Holds Tab**

Click on the **Holds** tab to place a **staff placed hold** on an item using **Add Holds**. Other buttons are the **Cancel Holds**, **Modify Holds** and **View Cancelled Holds**. Click on the **View Cancelled Holds** to see the information regarding any hold that was cancelled.



The **Cancel Holds** and **Modify Holds** become active when the box below **All** is clicked. Messages that it is too soon to renew or there are no more renewals may happen when renewing an item.



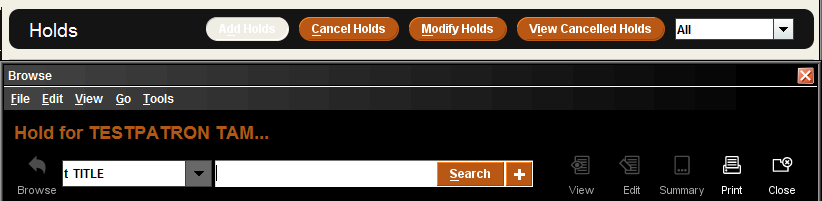
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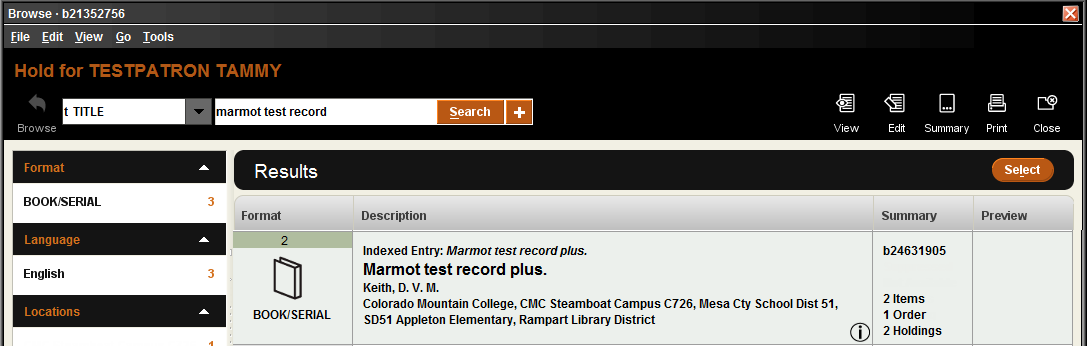
**Add Holds Button**

This is one way that staff can place a hold on an item for a patron. Click **Add Holds**.

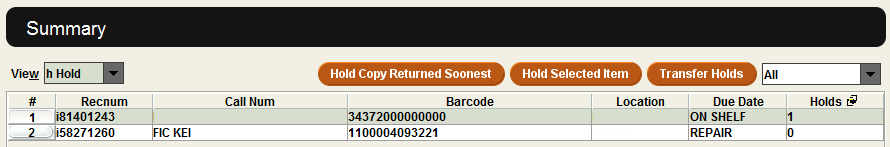


This will bring up the **Browse** function to look for the book to place the hold. Enter the **title** of the item.

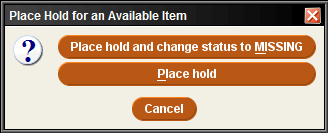


Click **Select** to view the item. Double clicking on the item will also open the record.

All the other libraries that have items attached will be listed. Click on the item for your library, or the specific item such as certain disk for a DVD set, or a certain book from a series from another library. Click on the **Hold Selected Item** to place **an item-level hold**.

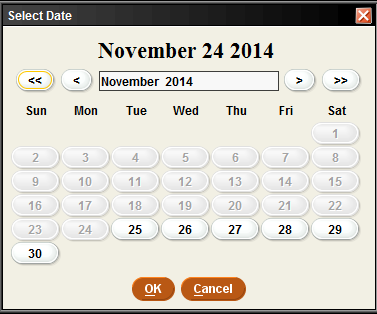


The **Place Hold for an Available Item** pop-up box will appear. Click **Place hold**.



This will bring up the **Place an Item-level Hold** pop-up box. The Pickup Location will be your library. The **Not Wanted Before** or the **Not Wanted After** is for a date when the patron wants the item, or no longer needs the item. Click **OK**.



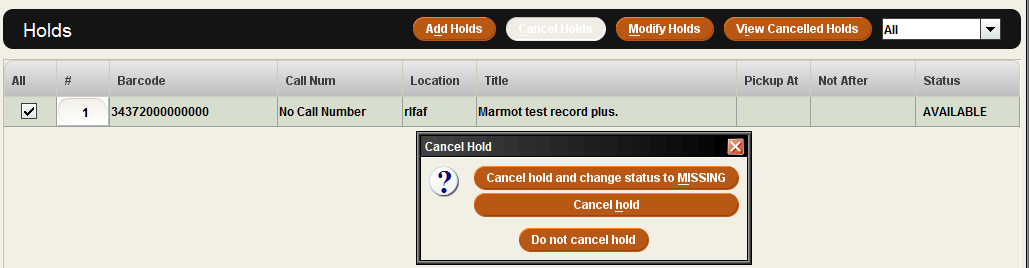
Double clicking inside the white box next to the Not Wanted Before and Not Wanted After will bring up the **Select Date** calendar.

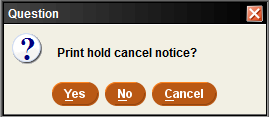
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**Cancel Holds Button**

This is one way a staff member can cancel a hold for a patron. Click **Cancel Holds**.



Depending on why the hold is cancelled, pick **Cancel hold and change status to MISSING**, or **Cancel hold**. For this example, we will click on the **Cancel hold**.

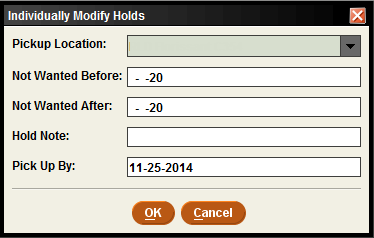
The **Question** pop-up box will appear with the message, **“Print hold cancel notice?”** Clicking **Yes** or **No** depends if a library wants to keep a record of a cancelled hold.

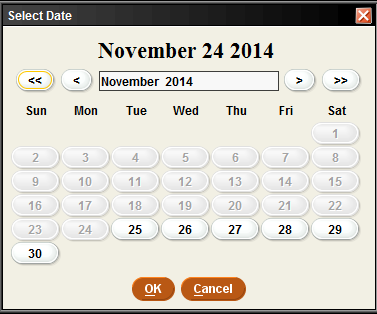
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**Modify Holds Button**

This is one way your staff members can modify a hold for a patron. Click **Modify Holds**.

The **Individually Modify Holds** pop-up box will appear. The Not Wanted Before date, the Not Wanted After date are dates when the patron wants the item, or no longer needs the item. A Hold Note can be added to share information. The Pick Up By date is general set by loan rules. Click **OK**.

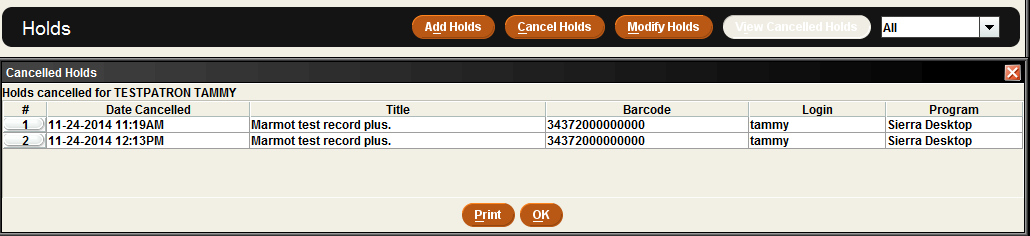


Double clicking inside the white box next to the Not Wanted Before, Not Wanted After or Pick Up By will bring up the **Select Date** calendar.

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**View Cancelled Holds Button**

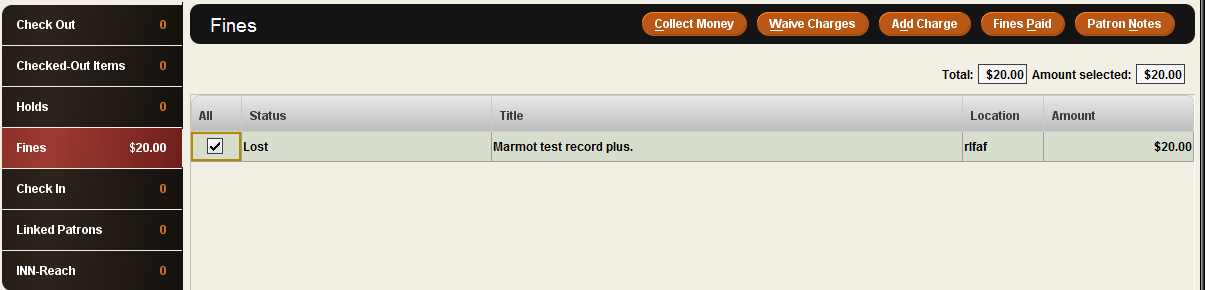
This is a way to view cancelled holds on a patron’s record. Click **View Cancelled Holds**.

This will bring up a list of any cancelled holds. Click **Print, OK** or the **X** to get out of the information.

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**Fines Tab**

Clicking on the **Fines** tab will display fines on a patron’s record. If the patron owes fines the tab will be a different color. Click in the box under the All to gain access to the **Collect Money**, **Waive Charges**, **Add Charge**, **Fines Paid** and **Patron Notes** buttons.



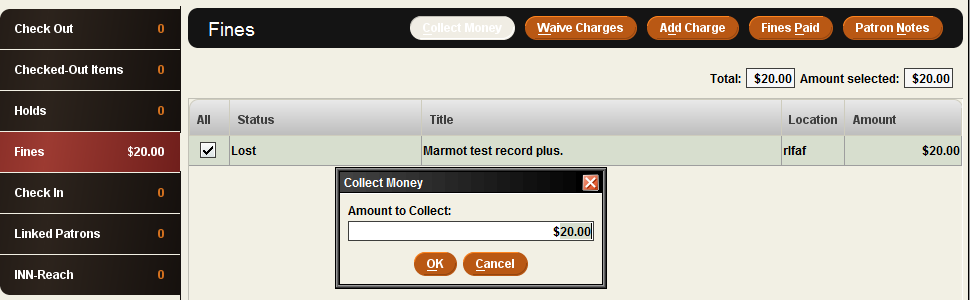
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**Collect Money Button**

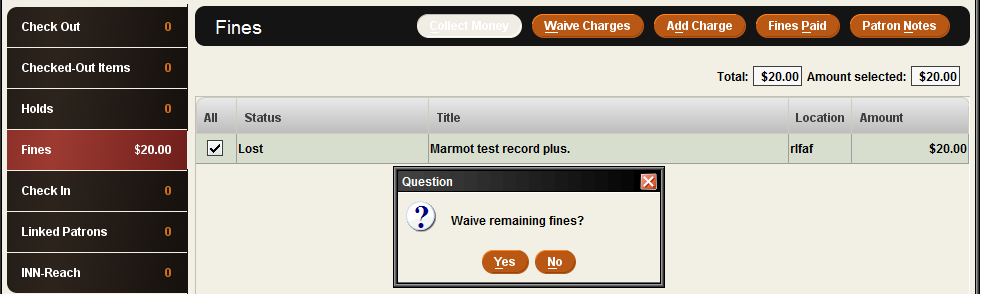
Collect Money button will allow partial or total payment from a patron.



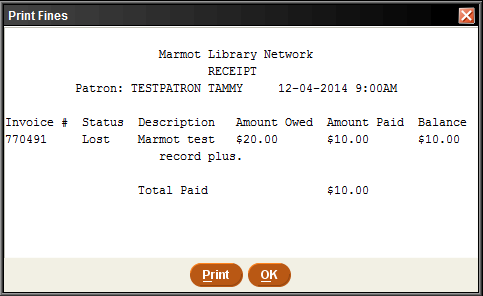
If the patron would like to pay the fine now, click the **Collect Money** button. This will bring up a **Collect Money** pop-up box. Either click **OK** or change the amount depending on what the patron pays. In this example, we are going to pay half of the amount owed.



The system is asking us if we want to **Waive remaining fines?** We are going to click **No**.



The system will generate a receipt stating how much was paid and how much is owed. The receipt can be printed for the patron.



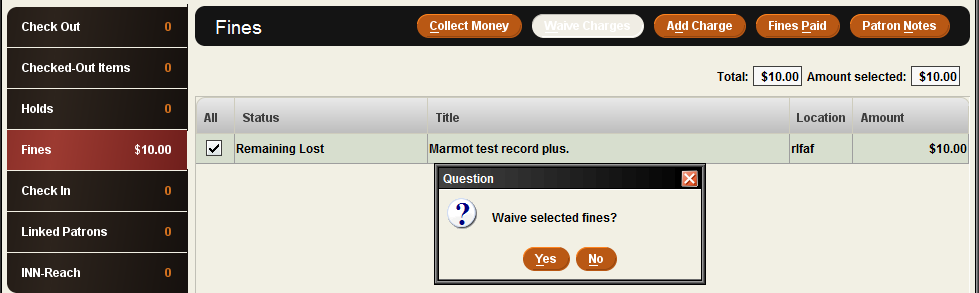
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**Waive Charges Button**

Waive Charges can be used for an amnesty day.



Click on **Waive Charges**. The Question pop-up will appear with the message, **“Waive selected fines?”** Click **Yes** or **No**.



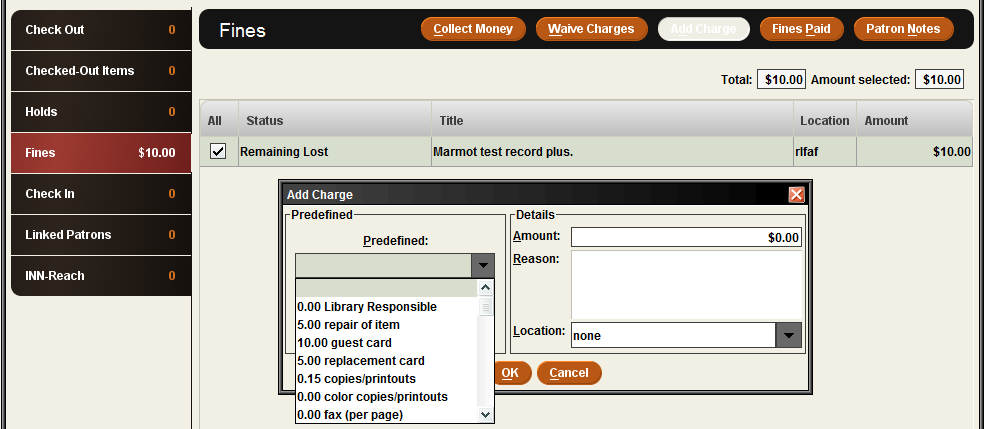
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**Add Charge Button**

The **Add Charge** will bring up a pop-up box with predefined fines that can be added to the patron’s record.



Click on **Add Charge** to bring up the Add Charge pop-up box. Click on the arrow in the predefined charges to pick a new charge. Use the scroll bar to see the list of charges that can be added to the patron’s record. The information will be placed in the **Reason** box. The **Amount** will added to the patron’s record once **OK** is clicked.

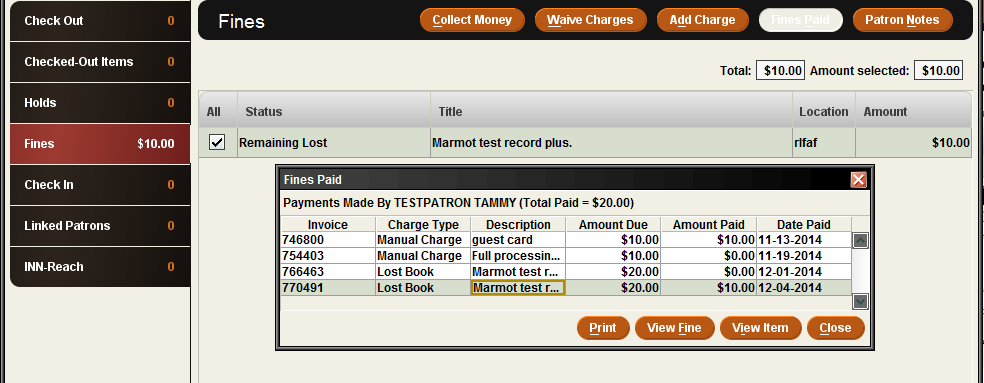


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**Fines Paid Button**

**Fines Paid** will show the history of any payment transaction on the patron’s record.



Click on **Fines Paid** to bring up the Fines Paid pop-up box. The choices are **Print**, **View Fines**, **View Items** or **Close**. **Tip:** Clicking on the item will make the **View Fines** and **View Item** buttons clickable.

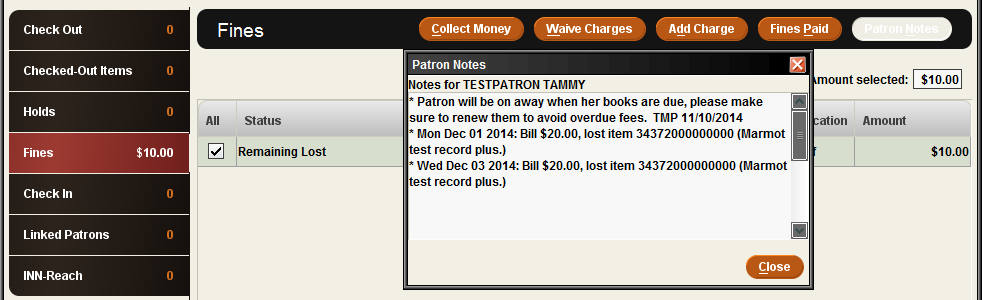
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**Patron Notes**

This is one way to view any notes associated with a patron. It is helpful when in the Fines tab to see any notes associated with any lost items.



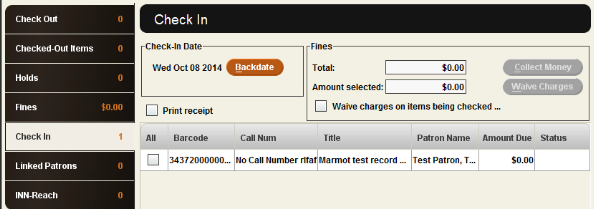
Clicking on **Patron Notes** will bring up the Patron Notes pop-up box. This will show **any notes** related to this patron.



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**Check In Tab**

Clicking on Check In will allow an item to be checked in that is on a patron’s account. Backdate, Waive Charges, Collect Money or Print receipt are also available from this screen. Note: The Check In tab can be used to check in other patron items. The system will automatically switch from the current patron to the new patron. However, it is better to use the Check-In (No Patron) function to check-in items.



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Linked Patrons and INN-Reach will be discussed in other documents.