

Check In & Check Out Evergreen 3.0 Web Client

Check in

- To check in an item click Check In Items from the Circulation and Patrons toolbar, or select Circulation-Check In
- Scan item and click Submit.
- If there is an overdue fine associated with the check in, an alert will appear at the top of the screen with a fine tally for the current check in session. To immediately handle fine payment, click the alert to jump to the patron's bill record.

Check in and Backdate an Item

- In the Checkin Screen, change the Effective Date to the desired date. Enter barcode and click submit.

Checkin Modifiers pop-up list. For (most) libraries, use the following procedures:

Do not use:

- **Capture Local Holds as Transits.** With this checkin modifier, any local holds will be given an in transit status instead of on holds shelf.
- **Ignore Pre-cat Items:** no prompt when checking in a pre-cat item. Item will be routed to Cataloguing with Cataloguing status.
- **Suppress Holds and Transit:** item will not be used to fill holds or sent in transit. Item has Reshelving status.

Use in appropriate situations, but not all the time:

- **Amnesty Mode/Forgive Fines:** overdue fines will be voided if already created or not be inserted if not yet created (e.g. hourly loans).
- **Clear Holds Shelf.** Checking in hold-shelf-expired items will clear the items from the hold shelf (holds to be cancelled).
- **Retarget Local Holds.** When checking in in process items that are owned by the library, attempt to find a local hold to retarget. This is intended to help with proper targeting of newly-catalogued items.
- **Retarget All Statuses.** Similar to Retarget Local Holds, this modifier will attempt to find a local hold to retarget, regardless of the status of the item being checked in. This modifier must be used in conjunction with the Retarget Local Holds modifier.

Use all the time:

- **Auto-Print Hold and Transit Slips:** slips will be automatically printed without prompt for confirmation.

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Check Out

- To check out an item click Check Out Items from the Circulation and Patrons toolbar, or select Circulation-Check Out
- Non-cataloged types are available by clicking on the 'barcode' label in the checkout screen

Receipt Options

- Quick Receipt--use to print a receipt for the check out without closing the record, which happens if you click Done
- Email and Print receipts available by using the down arrow next to the Quick Receipt or Done buttons
 - Just clicking the Quick Receipt or Done button prints the receipt UNLESS the patron has 'Email receipts by default' checked in the edit patron tab--in which case it will email the receipt immediately.
 - Computers can be configured to print silently to the receipt printer (without print dialog)
- Email Check Out Receipts --This feature allows patrons to receive checkout receipts through email at the circulation desk and in the Evergreen self-checkout interface. Patrons need to opt in to receive email receipts by default and must have an email address associated with their account. To Opt In a patron check the Email Patron Receipt box when registering a patron. in the Patrons can also opt in through their OPAC account or through patron self-registration.

Check Out with a Specific Due Date

- Before you scan the item, select the **Specific Due Date** checkbox. Enter the desired due date.
- ***New to 3.0: The Specific Due Date applies to all items until you change the date. Remember to de-select the Specific Due Date checkbox, or quit the patron record to clear the specific due date.**

Record In-House Use

- Available from the Circulation menu
- Select number of uses then scan a barcode or select a non-barcode type