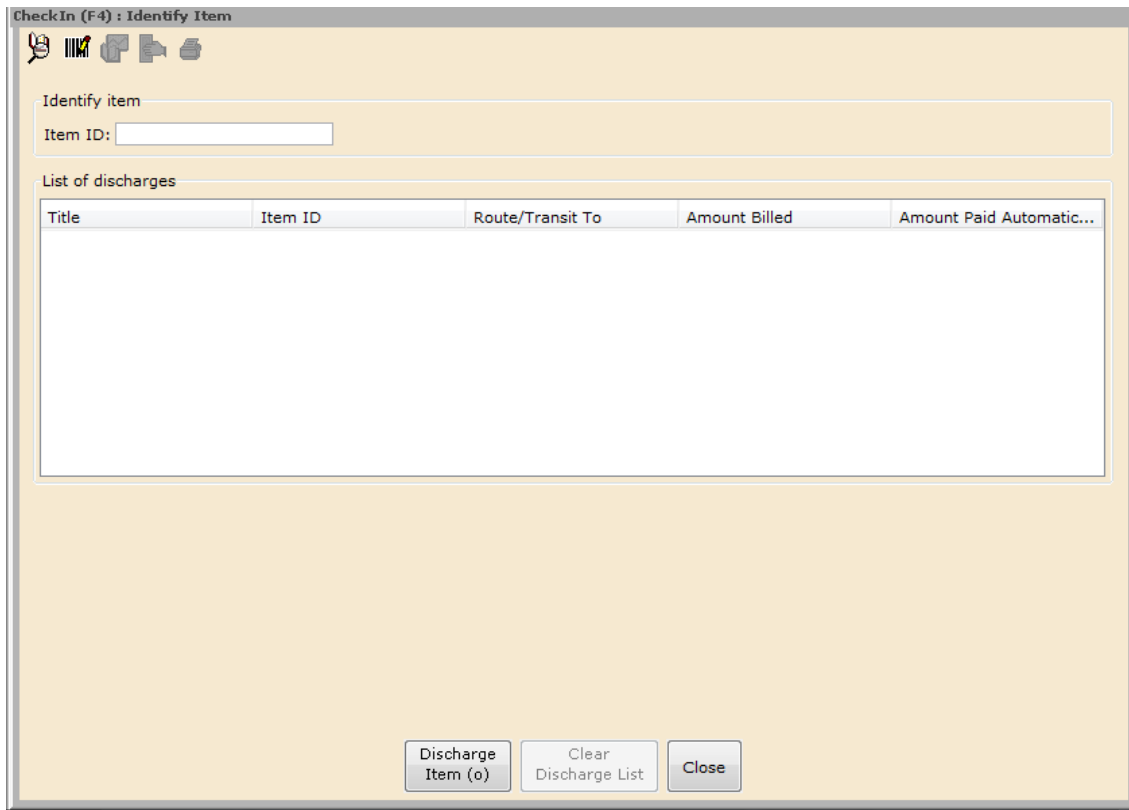# CheckIn Wizard

Use the **CheckIn** wizard to check-in materials that patrons return to the library.

To check-in materials

1. On the Common Tasks toolbar, click the **CheckIn** wizard 📖. The following window appears:
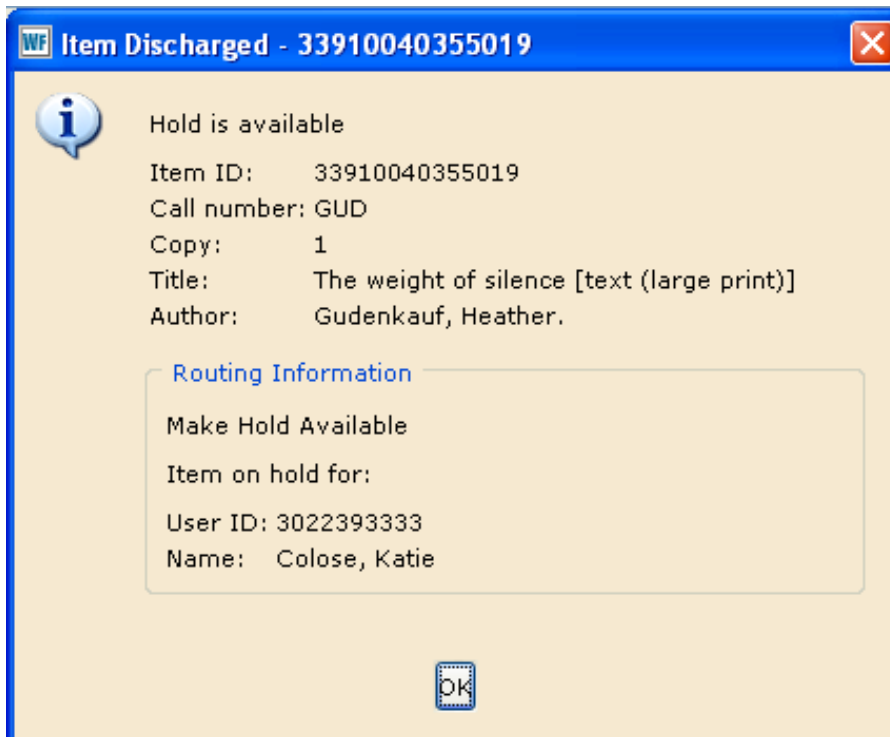

2. Type or scan the **Item ID**, or click the **Item Search and Display** helper 🔍 to locate the item.

3. If you scan the barcode on the item, it will automatically appear in the List of Discharges. If you type the Item ID manually, click **Discharge Item**.

> **NOTE:** In multi-library sites, library materials checked-in at a library other than the owning library trigger a routing message.

> **NOTE:** If an item is on hold for another patron, the system will generate the following message

Item Discharged - 33910040355019

Hold is available

Item ID: 33910040355019
Call number: GUD
Copy: 1
Title: The weight of silence [text (large print)]
Author: Gudenkauf, Heather.

Routing Information

Make Hold Available

Item on hold for:

User ID: 3022393333
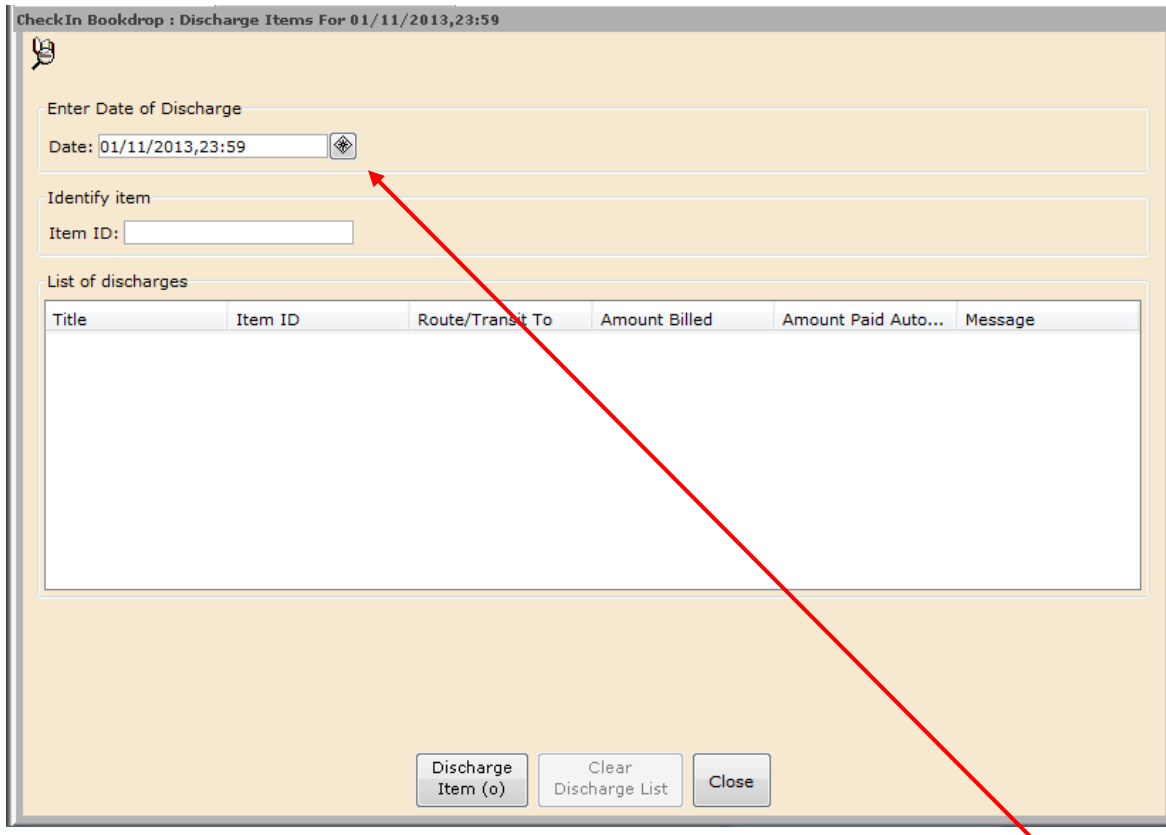Name: Colose, Katie

OK

4. Click **OK** to clear the message and print the Hold or Routing Slip.

5. Continue entering items as necessary.

6. Click **Close** to exit this window.

CheckIn Bookdrop Wizard

Use the **CheckIn Bookdrop** wizard to check-in items left in the bookdrop, and backdate the discharge date. This is helpful when patrons return items after hours.

To check-in items from the bookdrop

1. On the **Common Tasks** toolbar, click the **CheckIn Bookdrop** wizard [icon]. The following window appears:

2. The date in the **Enter Date of Discharge** box defaults to today. ****Click the gadget to select the last date you were open.****

3. In the **Item ID** box, scan each item's barcode to check-in the items. If reshelving the item at your library, the title and routing information will display. If the item will fill a hold or needs to be sent to another library, a pop-up will appear that needs to be closed in order to print the Hold or Routing Slip.

4. When you finish, click **Close** to exit this window.

Damaged Items

If a patron returns an item that is damaged there are 3 steps that staff should take.

First, if you catch the damage before you check in the item, mark down the current user information and note the previous user information.
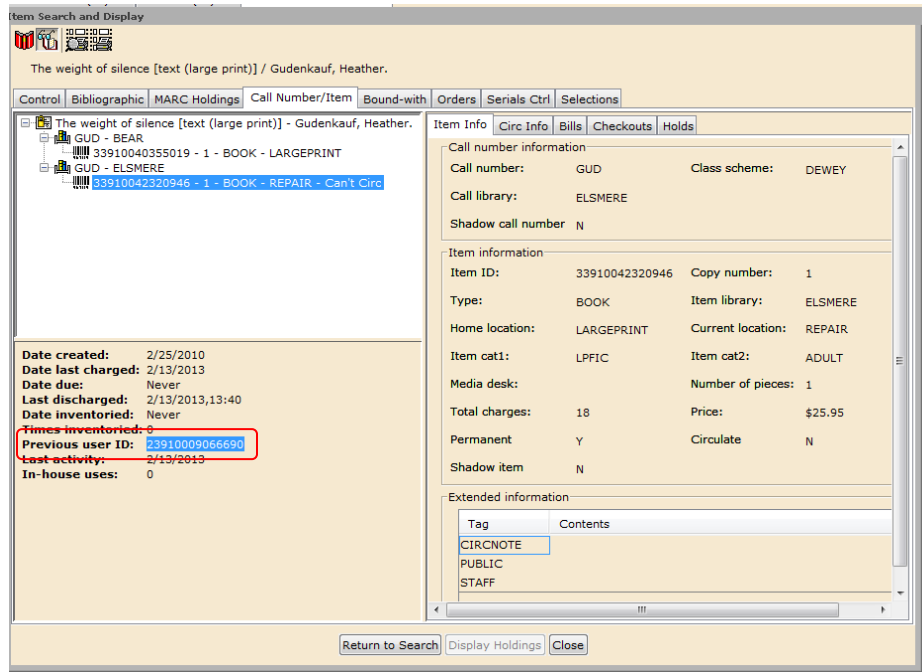
If you have already checked in the item, the previous user information will be the person who just returned it.

(See Section BEG 7 for instructions on the **Check Item Status Wizard** and the **Item Search Wizard.)**

Item Status Wizard shows current borrower **User ID**:
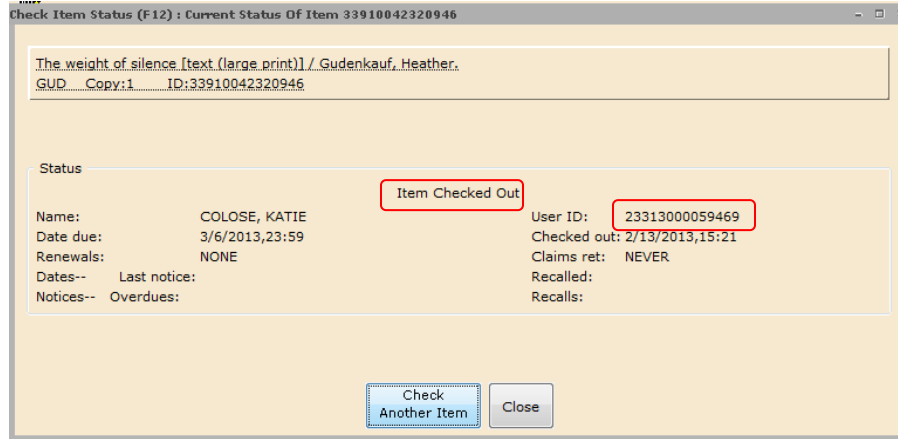
Item Search Wizard shows **Previous user ID:**

Second, the item should be checked out to the "Damaged User Record" for the library that <u>OWNS</u> the item.

1. Switch to the **CheckOut** wizard in the **Common Tasks** toolbar.

2. Click the User Search helper icon ![icon] and type "**DAMAGED**" in the Search for box.

3. Change the Type to **Keyword** and tap the **Enter** key or click the **Search** button. The Name (library) DAMAGED ITEMS will appear in the "List of users."

Choose the proper record for the library who owns the item and tap the **Enter** key or click the **Checkout To User** button.
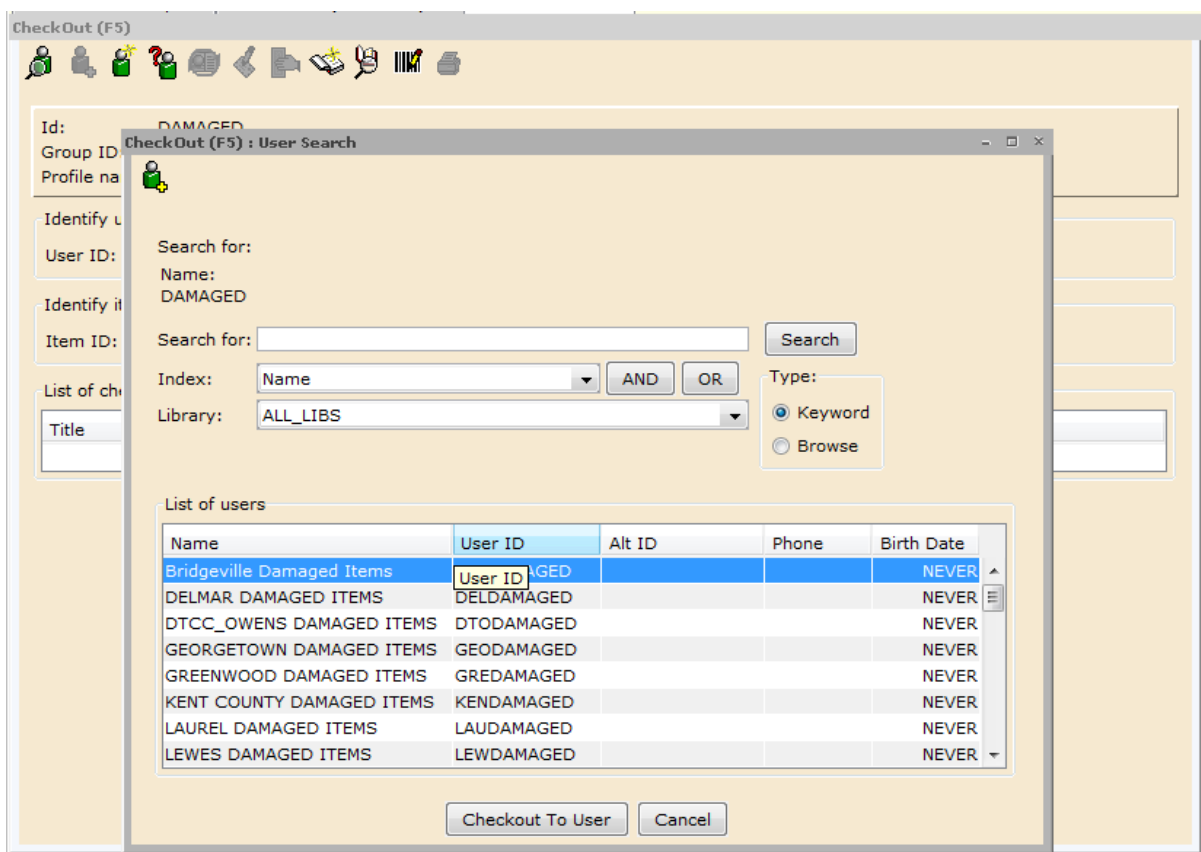
2. If a block message appears you will need to override it. Your supervisor will provide the code.

These are some of the possible block messages:
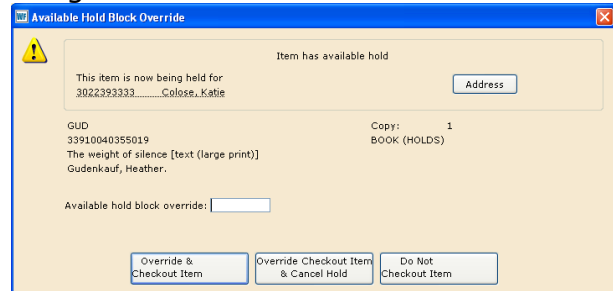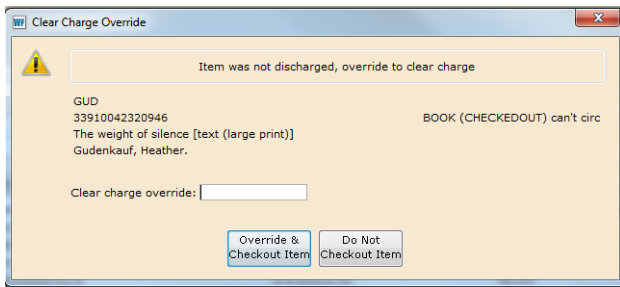
3. The item will now be checked out to DAMAGED until it is fixed and checked back in or until it is checked out to DISCARD and deleted from the system.
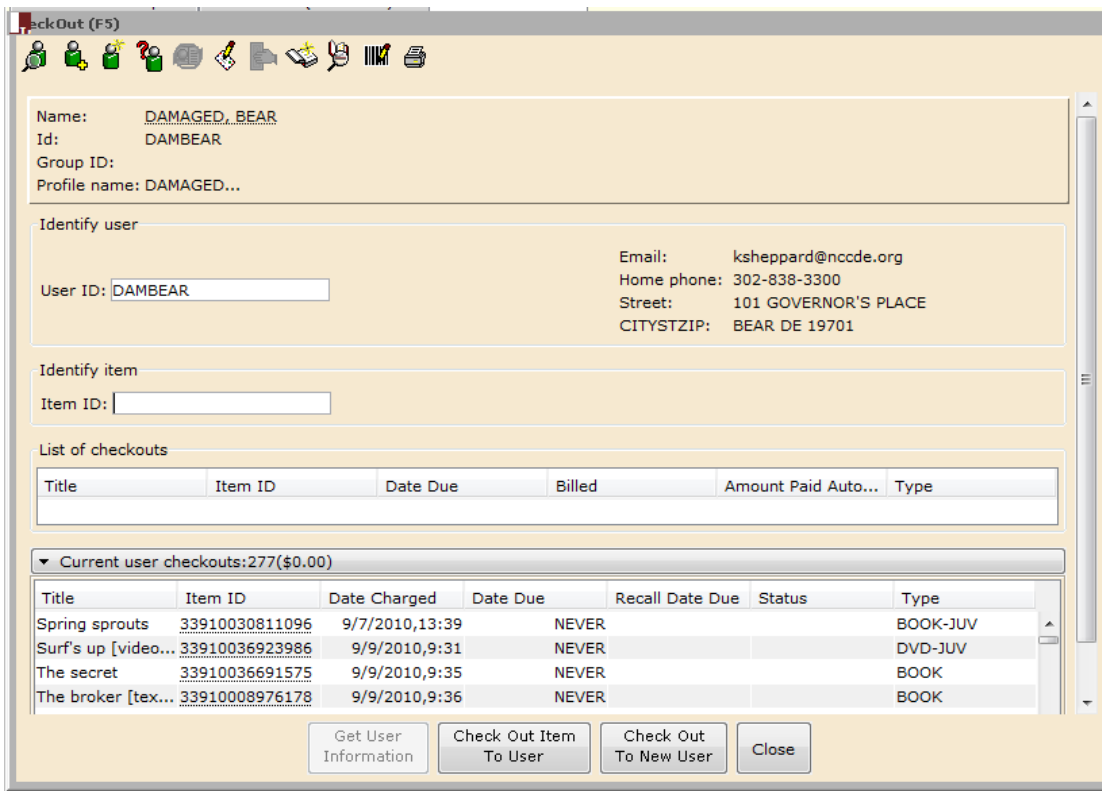
4. A list of all items checked out to DAMAGED can be seen toward the bottom of the screen or retrieved by pulling up the patron record using the Display User Wizard.

Display User (Alt + F10)

Name: DAMAGED, BEAR
Id: DAMBEAR
Group ID:
Profile name: DAMAGED...

Identify user

User ID: DAMBEAR

Email: ksheppard@nccde.org
Home phone: 302-838-3300
Street: 101 GOVERNOR'S PLACE
CITYSTZIP: BEAR DE 19701

Summary | Addresses | Extended Info | Bills | Checkouts | Holds | Suspension

Checkouts:277($0.00)

Title	Item ID	Date Charged	Date Due	Recall Date Due	Status	Type
Spring sprouts	33910030811096	9/7/2010,13:39	NEVER			BOOK-JUV
Surf's up [video...	33910036923986	9/9/2010,9:31	NEVER			DVD-JUV
The secret	33910036691575	9/9/2010,9:35	NEVER			BOOK
The broker [tex...	33910008976178	9/9/2010,9:36	NEVER			BOOK
Capital	33910029162105	9/9/2010,10:06	NEVER			BOOK
Coming home	33910033769614	9/9/2010,13:09	NEVER			PAPERBACK
Connected [sou...	33910038590205	9/9/2010,14:57	NEVER			CDBOOK
Wolf!	33910021301495	9/11/2010,15:02	NEVER			BOOK-JUV

Display this User (o)   Display Another User   Close

Third, the item should be given to the person in your library who deals with damaged items to evaluate possibly contact the owning library.

User Claims Returned Wizard

(This may also be done from the Display User Wizard [see Section BEG 6 of this workbook] and the Renew User Wizard [see Section BEG 2])

The **User Claims Returned** wizard marks an item that a user claims to have returned. If a user receives an overdue notice but claims to have returned the materials, you need to mark the materials with a claims returned date. Once marked, the user no longer accrues overdue fines for that item; however, the item continues to appear on the patron's current checkout list.

A Claims Returned status is considered a temporary status. The item remains charged to the patron for a time until the library determines if it is necessary to declare the missing or bill the patron for it (check with your supervisor for the proper procedure in your library.)

To mark an item with a "Claims Returned" date

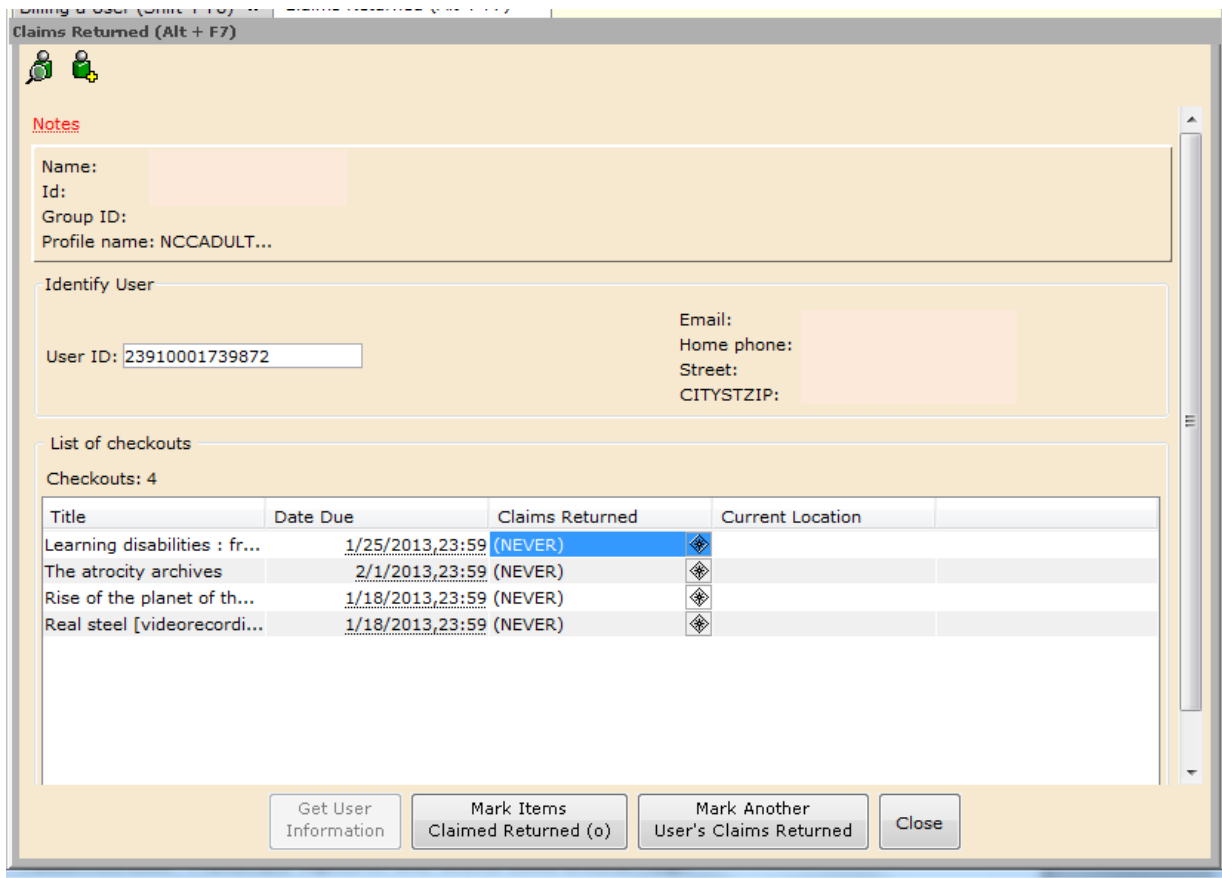1. On the Special toolbar, click the **User Claims Returned** wizard [icon]. The User Search window appears:

2. Scan the user's card, or type the **User ID** and tap the **Enter** or click **Get User Information**. If you need to look up the patron by name, use the User Search helper [icon]. The following window appears:

3. Click the Calendar gadget next to each item the user claims was returned, and select a date. This updates the information in the Claims Returned column.

4. Click **Mark Items Claimed Returned**. A "Record Updated" message appears next to each item that was claimed returned.

5. Click **Close** to exit this window.

> **NOTE:** To see how many items a patron has claimed to have returned, click the **Modify User** wizard and then select the Privilege tab.

> **NOTE:** If the item is returned, the number of "claims returned" is not decremented and must be lowered manually if an item is indeed found to be checked in. This helps you track repeat offenders.

Mark Item Lost Wizard

(This may also be done from the Display User Wizard [see Section BEG 6 of this workbook] or the Renew User Wizard [see Section BEG 2])

Use the **Mark Item Lost** wizard if a patron claims he has lost the item. This wizard changes an item's current location to LOST-CLAIM without discharging it from the patron's account.

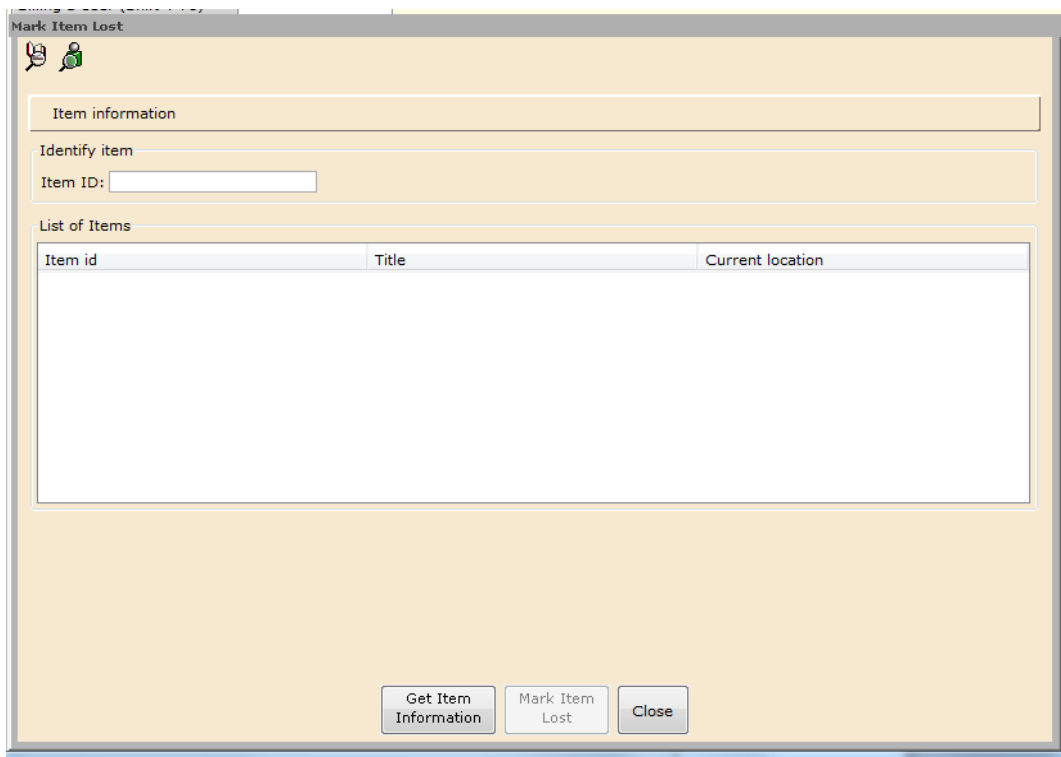Lost items remain in the catalog and are visible in the staff WorkFlows interface.

What is the difference between Claims Lost and Assumed Lost?

Claims Lost means that a staff member manually marked an item as Lost with the **Mark Item Lost** wizard.

Assumed Lost means that the item has automatically been marked lost after a specified period past the due date.

To mark an item lost

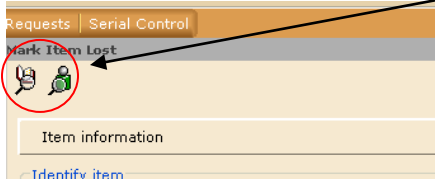1. On the Items toolbar, click the **Mark Item Lost** wizard.

2. If you know the item barcode you can type it in the **Item ID** box

OR

3. Click on the **Item Search** or **User Checkouts** helper to find the item or patron's record:

4. In the User Checkouts helper, scanning a patron's library card should bring you directly to their record. If you search by name you will get the following screen with the "List of users". Highlight the correct name in the list.
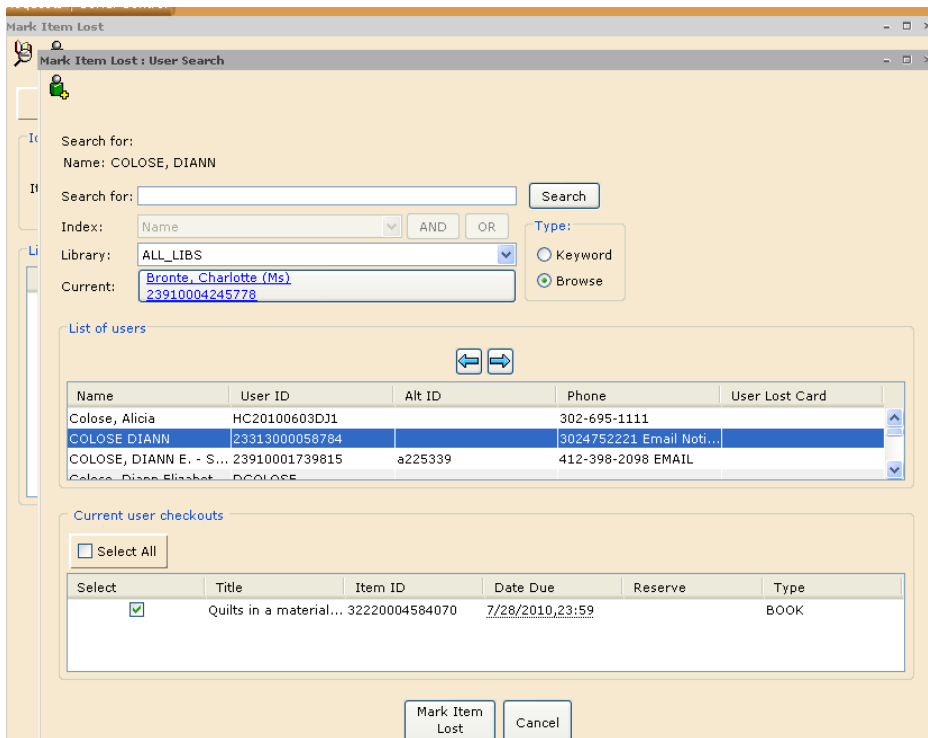
5. Under "Current user checkouts" will be a list of all items currently checked out. You may **Select All** or select individual titles from the patron's list. Click on the **Mark Item Lost** button.

6. The single item OR the <u>FIRST item in the LIST</u> will appear in Mark Items Lost window:

7. Click on **Mark Item Lost** to put it in the list and the Billing window will appear:

VERY, VERY IMPORTANT:

8. If you click on **Bill User**, the charge will appear on the patron's record and must be paid from their record

BUT

If you click on **Pay Now**, the system assumes that you are collecting the money at that moment and does not put the charge on the patron's record.

9. Click **OK** to clear the confirmation window.

> **NOTE** If the item you are marking as lost has a hold on it, you must override the hold.

What happens if an item is returned before the user pays the Lost Item bill?

If the item is returned or found before the user pays the lost item bill, Symphony displays a message when you check-in the item, check it out to another user, renew the item, or put the item in transit. Symphony clears the item's LOST-CLAIM or LOSTASSUM location, and removes the lost item bill from the user record. If you assessed a lost item processing fee at the time the item was marked Lost, and if the library's policies are so configured, Symphony automatically removes the bill from the user's Bill record as well. The overdue fine for the item is calculated and added to the user record.

What happens if an item is returned after the user pays the Lost Item BILL

If the item is returned or found after the user pays the lost item bill, Symphony alerts you that it cleared the LOST-CLAIM or LOST-ASSUM location. When you see this message, you know that the item had been marked as Lost, and the lost item bill was paid or waived. You can issue a refund to the user for the paid lost item bill according to your library's procedures.

Partial Returns (based on New Castle County Procedures)

If a patron returns only part of the multi-part item or is missing a disk from a Music or AudioBook CD or a DVD follow these steps:

1. Renew the item to the patron by following the steps in part 3 of this workbook.

2. Print the due date slip to attach to the item by following the steps in part 6 of this workbook.

3. Call the patron to alert them to the missing item.

4. Add a note to the patron's record indicating the missing item by following the steps to **Edit User Record** in part 7 of this workbook and Clicking on the **Extended Info** tab.

5. Type a note about the partial return in the **Notes** field. Whenever the **User Record** is brought up, the **Notes** link at the top of the record will appear and clicking on it will bring up the notes.