Charge = Checkout = Borrow

Getting Started

1. Greet the borrower with a smile and confirm that s/he wants to check out library materials. All items to be checked out must be present.

2. Familiarize yourself with the local Hold Shelf, the Temporary/24-hour Hold Shelf, and/or the on-site Reserve collections since part of the checkout process may include retrieving items from one of these sites behind the service desk.

3. Ask the borrower for his/her library card if it has not already been handed to you. Make sure the card presented matches the person in front of you. The preferred and valid forms of identification to checkout library materials include.
   - KU Card (for KU users who occasionally arrive without their KU Cards, ask your supervisor to determine whether charging can continue upon presentation of other photo identification)
   - KU Libraries Proxy Borrower Card; also ask to see the proxy’s photo ID (KU Card, driver’s license, passport)
   - KU Library Borrower Card OR paper Temporary Borrower Card with a photo ID
   - KU Med Center hangtag ID Card (see More about KU Med Borrowers on page 8 for additional information)
   - KU Library School Group Borrower Permit (preferably with a photo ID, but many are too young to have a photo ID)
   - Haskell Indian Nations University photo ID card (HINU students primarily)

See also: Workaround for KU Borrowers without their KU Cards (G:\Circ Forum\Student Training\008 – KU Card Workaround).

Checking out KU Items

1. Ask the person if s/he would like to have a printed receipt for each item to be checked out. If so, prepare to print receipts.

2. To print Date/Time Due (Item Charged) slips/receipts:
   - Make certain the printer you want to use is designated as the default printer.
     - Start > Printers and Faxes > Highlight printer to use > Right click > Set as Default Printer > Close out.
Basic Circulation Procedures: Charging Workflow

• For each Voyager location to be used, turn on Date/Time Due receipt/slip printing by:
  o Options > Session Preferences > click Print Due Date Slips to add checkmark > OK. Do NOT immediately go back to double check as it can turn off the setting you just turned on.
• One Date/Time Due receipt will print for each item.
  o If authorized to modify due date, a second receipt will print after the due date is modified. Put the first copy in the shredding box.
• When finished with items for the person and/or location, turn off receipt printing:
  o Options > Session Preferences > click Print Due Date Slips to remove checkmark > OK
• Reminder: you must turn the options on and off in each Voyager session used.

3. Ask the person if any of the items are already checked out, and if so, does s/he want to renew them. Items already checked out must be handled as renewals; see “Basic Circulation Procedures: Renewals” for instructions.

4. Review the items presented for checkout to determine which Voyager windows/locations (a.k.a., policy group) you will need to use. Use the “Locations in Each Policy Group” list or “Be in the right place at the right time” cheat sheet (Watson) to help select appropriate Voyager locations to check out item(s).
  • If the person has items from multiple policy groups/sign-on locations to check out, you will need to swipe the card on each of the windows/locations.
  • If the person has requested receipts, you will need to turn on receipt printing in each of the windows/locations.

5. Click the Charge icon, located in the upper left corner of the Voyager circulation toolbar.
  • Swipe the card through the card reader until you hear it beep and the person’s name appears on the screen. You may need to swipe the card several times in both directions before it will read. Sometimes you have to clean the stripe.
  • It is contrary to established policy to keyboard patron barcode numbers.
6. Verify that the name in the Voyager **Charge** window matches the name on the card in front of you. The barcode and patron group should also appear and match the card.
   - At this point, if there is any type of pop-up note or other block on a borrower’s privileges, refer the situation to a circulation supervisor. Examples include:
     - Patron not found
     - Multiple patron records
     - Patron barcode expired
     - Patron record expired

7. Once the card is successfully swiped and there are no patron blocks, the cursor should automatically move to the item barcode box in the middle of the charge window.

8. Each item should have its own barcode or OCR number.
   - Older items often have OCR numbers located inside the back cover with a second one inside the front cover, usually on the title page or the back of the title page (the verso).
   - For items with barcodes, the barcodes will appear inside the back cover (at the top right corner) or on the back of the volume (middle top for bound and paper bound items or at the bottom right for unbound periodicals).
   - Be careful to not confuse publisher barcodes with KU item barcodes.
   - If there is no barcode or OCR number, consult a circulation supervisor.

9. Scan each item using either the barcode scanner for the OCR wand for each item.
   - Make note of multiple items or pop-up notes.
   - You are authorized to override in order to check out items from other libraries.

10. If there is any pop-up note with which you are not familiar or that you do not have authorization to override, consult with a circulation supervisor. Examples include:
    - Item marked as missing, lost, or claims returned.
    - Discrepancies in due dates.
11. Once the item is scanned, the title, barcode, due date and status of the item should appear in the lower middle of the charge window. The status of the item should have the letter ‘C’ for a first time checkout.
   - If you see ‘R’ for renewal, you have either scanned the item more than once or you need to handle that item as a renewal.
   - To ensure that the borrower gets full loan periods and the ability to renew online, when applicable, handle all items that come up with an ‘R’ as renewals. Discharge the item and start over. See Basic Circulation Procedures: Renewals for additional information.

12. Make a note of the due dates so that you can tell the borrower the due dates for each different item type.

13. If patron is limited to two weeks for a long-term loan item, it usually means the item has already been recalled by another person; this requires verbal explanation to the borrower you are helping.

14. Once you have scanned all of the items, desensitize all items so they won’t set off the Theft Detection alarm.
   - Run the spine of the books along the desensitizer.
   - For DVDs in locked cases, use the de-tagging device to remove the red lock.
   - Videos must be desensitized by running the strip of white tape on each video across the special video desensitizer for videos.
   - Do NOT desensitize cassette tapes.
   - Laptops, ILLs with blue jackets, microfilm, microfiche, and opaques do not need to be desensitized.

15. Give the items and any printed receipts to the person and verbally report time due for each item or group of items to the borrower.

16. If the person did not ask for printed receipts, offer him/her one of the “Renew a Book” bookmarks.

17. Click ‘X’ after the patron barcode on the screen to clear his/her account. Be certain to do this on all Voyager sessions used. This is one of the required steps to protect borrower confidentiality.
18. If someone wants you to print a list of due dates for the items they have checked out, one option is to print the list from within Voyager circulation. This list now includes call numbers, titles are often abbreviated, and enumeration and chronology do not appear when applicable. This is useful when a large number of items are involved.

- Click Charge icon > Swipe Borrower Card > Click Charged Items icon (card catalog drawer) to bring up Charged Items Index > click Print.
- The list will print to that workstation’s default printer. To send to another printer, follow these steps. From within Voyager Circulation, click File on the menu bar. Select Print Setup > select preferred printer > click Print to apply (caution: depending on where you are, the system may print something you don’t want). Then go back to patron’s inventory to print.

19. Modifying due dates: be very cautious.

- It’s a given that you have to do it with ILL items; see section starting on next page for checkout of ILL items.
- For everything else, modify due dates only after determining there is no other alternative. Why?
  - The patron may not have borrowing privileges beyond the date listed. This is likely to be the case for many KU affiliates, KU Other, Resident, and Reciprocal borrowers. A circ supervisor can help.
  - Changing the due date messes up calculation of overdue charges, and in some cases, results in no charges whatsoever. It is better to assign a temporary item type and a Circulation Review item status. A temporary location may be required if the item type is not defined within the checkout location you want to use. A circ supervisor can help.

Checking Out ILL Items

1. ILL jacket information includes:

- Patron information: name, status, patron barcode.
- Item information: due date, ILLiad TN number (serving as the item barcode).
- Instructions for circulation staff and patrons.
- Pull from Hold Shelf date in upper right corner.
2. To check out ILL items to KU patrons:
   • Open **Charge** function on Voyager taskbar.
   • Ask patron to present **identification**; confirm match with information with Item on Hold slip.
   • Scan (includes enter) or type **patron barcode** (press enter) from ILL jacket. Confirm match with ID and jacket.
   • Scan (includes enter) or key **ILLiad TN number** (press enter) in the item barcode field one at a time from ILL jackets. Override location block.
   • Highlight each item, right click, select **Modify Due Date**, and enter the due date from the ILL jacket.
   • **Desensitize** each item unless media.
   • **Report due date** for each item or group of items to patron. Watch for variations in due dates. Print receipts upon request.
   • Note: Remember that a single ILL barcode can include multiple items.

3. Modify due dates for ILL items to match what is on the ILL jacket.
   • Highlight the item for which you need to modify the due date. Right click and choose Modify Due Date from the dropdown. Enter the due date based on the ILL jacket, either by typing it or by using the pop-up calendar (click the ellipsis to bring it up). Look again to verify the due date is correct and matches the ILL jacket.
   • Remember that multiple ILL items can have a variety of due dates and won’t necessarily all match.

4. See “Basic Circulation Procedures: Renewals” for information about renewing ILL items.

5. Handling ILL “Library Use Only” items:
   • Library Use Only (LUO) items have bright blue jackets, red LUO stickers, and a **DO NOT DESENSITIZE** sticker. A bright green flag is also included inside each item outlining LUO policies.
   • Check out the items to the patron for in library use only.
   • At return, discharge the item and put it back on the Hold Shelf.
   • Each time the item is in use, it needs to be checked out to the patron.
   • When the patron is finished, s/he should sign the jacket to confirm that s/he is finished with the item. You may ask the patron each time LUO items are turned in if s/he has finished.
   • It is important that the ILL materials with blue jackets be discharged because if they are not, the patron could forget that they are still on the hold shelf (or decide they no longer need them without telling us) and be charged overdue fines once they pass the due date.
6. Handling ILL Short-term Loans (everywhere except Watson)
   - For ILL items with very short due dates such as 2-3 days, use the patron email or phone number enclosed with the item to contact the patron to let him/her know the item is available and how long it will be available for use. Please contact the patron as soon as you receive the item.
   - You may use the email template outlined below.

<table>
<thead>
<tr>
<th><strong>Subject Line:</strong> Short Term Interlibrary Loan Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>The loan entitled __________ is available for you to pick up at xxxxxx Library. It is a short-term loan; the loan must be picked up and returned by __________.</td>
</tr>
</tbody>
</table>

You will be receiving an email Item Available Notice telling you that you have 10 days to pick up the loan. **That email is incorrect.** You only have until ____________,

Questions? Contact Interlibrary Loan Borrowing at (785) 864-3960 or at illborr@ku.edu.

Thanks.

Xxxxxxxx Library
(785) 864-xxxx
More about KU Med Borrowers

- Patron records for KU Med students, faculty, and staff do not automatically load in Voyager circulation; thus it can be tricky to determine who should be valid for Lawrence/Edwards campus library privileges. KU Med borrowers are authenticated for library services one by one. The patron record expiration dates will be entered manually to closely match their Lawrence/Edwards counterparts, but will never automatically update in the future. Thus KU Med borrowers have to be re-authenticated and the patron record updated with each library visit.
- Due dates for KU Med borrowers will be driven by the patron record expiration date.
  - Currently enrolled undergrads get 6 week long-term loans.
  - Currently enrolled grad students get 4 month long-term loans.
  - Individuals with the KU Med faculty-staff patron type get 4 month long-term loans.
  - If checkout does not provide this time allowance, get your supervisor involved to review and authenticate the patron.
- If the KU Med Borrower presents a photo ID hangtag with a barcode attached, bring up Charge window and scan (not swipe) the barcode. If it brings up a valid record, proceed with checkout. If not, find a circulation supervisor to help.
- If the KU Med Borrower says we have already authenticated him/her for borrowing privileges and the person does not have the KU Med hangtag available, we are required to accept their driver’s license and do a name search via the Charge window. **Very important note: this is the ONLY patron group for whom this exception will be routinely made.**
- Please note that some KU Med Borrowers may have a business card sized piece of paper/index stock that provides a patron barcode that will read something like KUMC26001. Scan this barcode and if a valid record comes up, proceed with checkout.