# Circulation Essentials Manual

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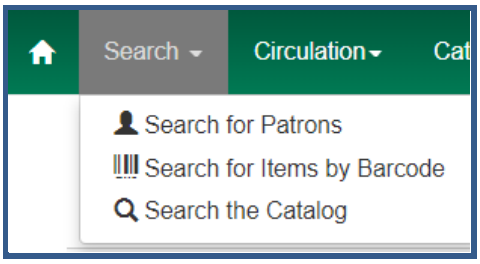
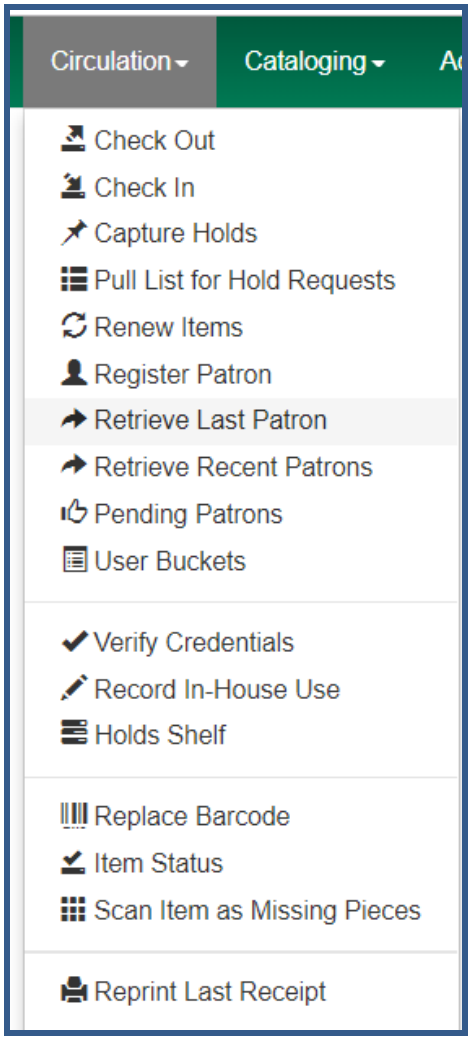
# Evergreen Navigation




## Common Menus

- Search
- Circulation
- Cataloging




## Patron Lists

- Double-click a record line or the barcode to open the record
- Check one or more box(es) at the left of a record to select it or select the box at the top of that column to select all records
- Right-click in a blank place on the record or use the **Actions** drop-down menu to see options for actions you can take on those records

## Item Lists

- Click the title link to go to the default view, usually the OPAC view
- Click the barcode ID to go to the Details view
- Check one or more box(es) at the left of a record to select it or select the box at the top of that column to select all records
- Right-click in a blank place on the record or use the **Actions** drop-down menu to see options for actions you can take on those records

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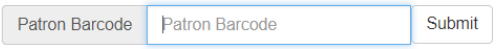
## Checkout Basics



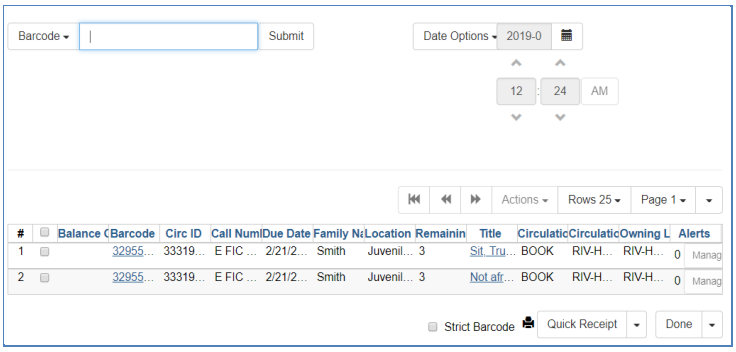

1. From Home, click *Checkout items* or go to *Circulation>Check Out*

2. Scan the user's barcode. Alerts and notes will display
   *****A blocked or barred patron must resolve account issues before proceeding.** Press Items Out, Holds, Bills, or Messages to investigate and clear issues or to go to Checkout.***

3. Scan the item barcode in the Barcode field.

4. Continue to check out all of the items to the user.

5. Click **Done** to send a receipt in the patron's default preference (email and/or print) to exit the patron's record and check out materials to the next user.




**OTHER OPTIONS**

- Press the Enter key to open the **Done** dropdown and choose the receipt type or no receipt

- Click **Quick Receipt** to send a receipt in the patron's default preference and stay in the patron record.

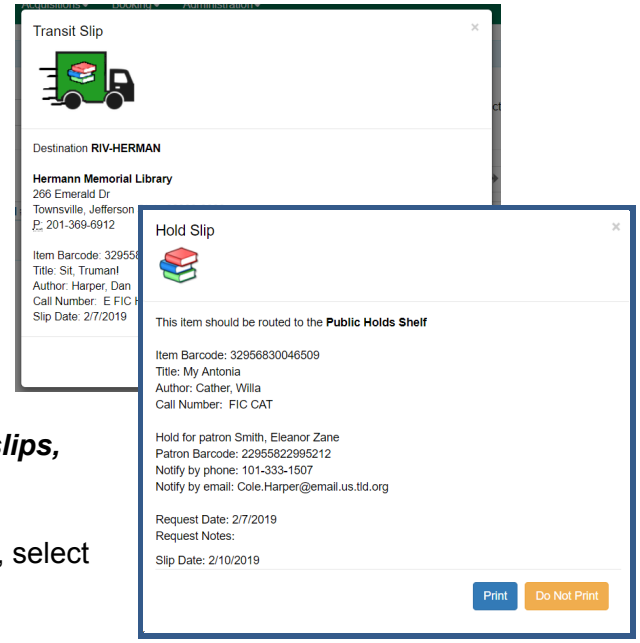
## Checkin Basics

1. From Home, click Check In Items or go to *Circulation>Check In*

2. Scan the item barcode or type the item ID and click **Submit**.

   - ***WATCH THE SCREEN FOR MESSAGES (hold, in transit, item notes, etc.) FOLLOW UP AS NEEDED.***

   - ***Click Print or Do Not Print to manage transit and hold slips, etc.***




3. Continue to scan items until all items are checked in. If desired, select one or more items and *Print Receipt*.

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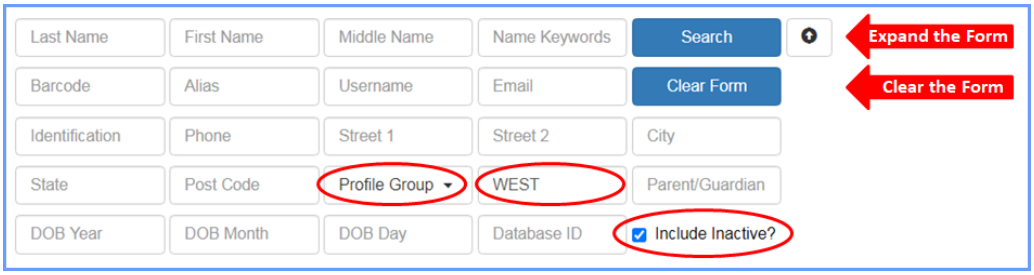
# Patron Records

## Search For Patron

1. Go to ***Search > Search for Patron*** or ***Patron Search***

2. Expand the search fields. Make sure search includes
   a. All Profile Groups
   b. All Libraries (WEST)
   c. Inactive users



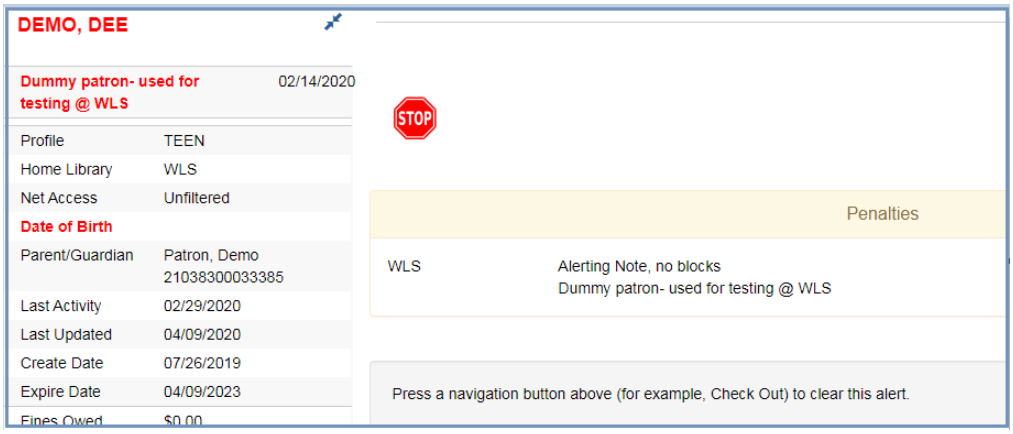

3. Enter the user's last name and first initial. Double click the names that match your search entry display.

4. Click a user name to select a user. The user information will display to the left part of the screen. Choose an option button to Check out, see Items Out, Holds, add or pay Bills, Edit the record
   **OR**

If there are no matching users, go to ***Circulation > Register Patron*** to register the patron (see **Patron Registration, page 6**)

# Patron Display

*The stop sign alerts you to holds that are ready for pickup, overdues, lost items, alert messages, etc.*
***FOLLOW UP AS NEEDED.***




## Patron Summary

The patron name appears in red if the patron has alerts. Information associated with the alert(s) also appears in red.

# Closing the Patron Record

After you've already checked items out to the patron and printed their receipt from the Quick Receipt button, you may need to address other items in their record. To exit from the patron's record when looking at the Items Out, Holds, Bills, Messages or Edit tabs, simply open the Checkout option from the Circulation dropdown menu at the top of your screen.

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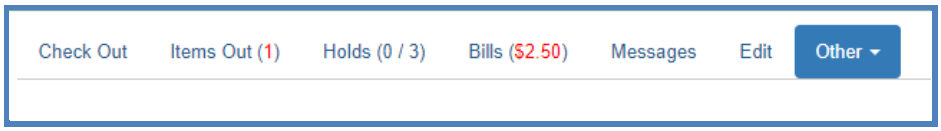
## Navigation Buttons




- **Check Out**
- **Items Out**
    - Renew
    - Print Item Receipt
    - Edit Due Date
    - Mark Lost (by Patron), Mark Claims Returned, Mark Claims Never Checked Out)
- **Holds**
    - View
    - Edit Pickup Library, Notifications, Hold Dates
    - Cancel, Suspend, Activate Hold
- **Bills**
    - View, Add, Pay
- **Messages**
    - Add/Modify/Remove an alert that will display in **red** in the patron summary
- **Edit**
    - **Replace Lost Card** (click Replace Barcode and enter the barcode number)
    - **Renew card**/Update Privilege (click Update Expire Date)
    - **Reset the Password (PIN)** ***Only when the patron has forgotten their PIN***. Verify the daytime phone and update to match the last 4 digits. **DO NOT click Generate Password!**
    - **Update Contact Information:** Name, Email (lowercase format), Phone (no spaces, no dashes), Address, Select *Email checkout receipts by default* if the patron want email receipts.
    - **View Claims Returned and Claims Never Checked Out Counts**
    - **Update User Settings** (for hold notification)
    - **Edit Patron Alert** Message (optional)
    - **Edit Statistical Categories** if your library has contract patrons
- **Other**
    - Add, edit, delete patron notes that visible in the patron OPAC account

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## Common Checkout Workflows

### Make Patron Inactive

The best practice for making a card *temporarily* inactive is to apply a Message that blocks the patron.

- The card can't be used to place holds, check out, or renew.
- The message block takes care of the message and the block all at the same time.
- The procedure is easy to view and undo.
- The patron and card remain searchable because the card is still active.

### Blocked Patron - Patron Exceeds Fine workflow

1. Pay the bill
2. Go into Messages, delete the alert and refresh the page.
3. Check out

### Patron B comes in to check out a hold for Patron A (permission is noted on Patron A card)

1. Verify Patron B's ID and check out the item ON THE REQUESTOR'S CARD.
2. Add an ALERT on Patron A's record regarding pickup permission.

   Reason for this workflow: in Evergreen, it's possible to checkout on a card other than the requestor and have an option to cancel the hold, but in that workflow, the hold is cancelled (not FILLED) and the library will not get a count for the hold.

### Add a Bill

1. Retrieve the patron record and open the Bills tab.
2. Click the Bill Patron button in the middle of the screen.
3. Use the drop-down for Billing Type to choose the bill type.
4. If adding a miscellaneous bill, be sure to include a **brief** description in the note field.
5. Enter the dollar amount, including a decimal.
6. Click Submit Bill.

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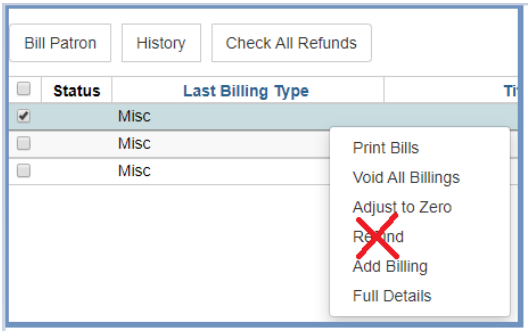
## Pay a Bill on a Patron Account

1. Retrieve the patron record and open the Bills tab.
2. Use the checkboxes to select the bill(s) you want to pay.
3. Use the drop-down to select a Payment Type.
4. In the Payment Received field, enter the dollar amount, including a decimal.
5. Click *Apply Payment*. If full payment is made, the Bills tab will show a zero balance.

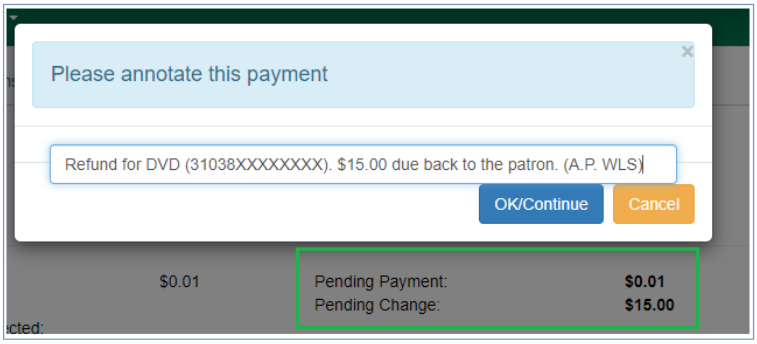
- If a paid bill still shows in a patron account, it did not close properly for some reason. To remove it, add $.01 and pay $.01 to force the bill to close.
- When you take a credit card payment outside Evergreen, the best practice is to
    - Check the Annotate box. Then click Apply Payment. In the Annotation, add the note "externally processed payment" and your initials and library code. The annotation will display in the Payment History Notes field.
    - For the approval code, use your initials and library code.
- Remember to uncheck the Annotate box when finished.

## Refund a Bill

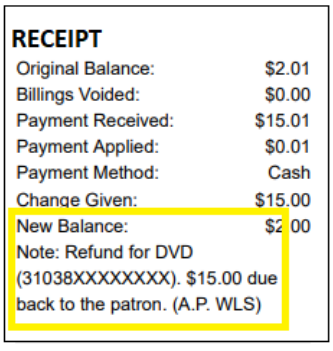



The refund option in the patron's bill display does not work as expected. There is a bug (1810429) reported on launchpad. To "Refund" an item that has already been paid for (Ex: patron pays for a lost DVD, then the DVD shows up), our current work-around is:

1. Create a bill
    a. Bill Type: MISC
    b. Amount: $.01
    c. Bill Note: Refund Title, Barcode ID, Date, Amount refunded, Library Code and Staff initials




2. Pay the bill
    a. Enter the amount of the item refund plus $.01
    b. Check the Annotation box
    c. Add a bill annotation with the refund information: Refund Title, Barcode ID, Date, Amount refunded, Library Code and Staff initials. This will display on the receipt and in the payment history when the Last Billing Note column is displayed.

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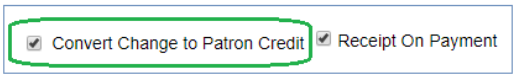
d. Apply the payment.

e. Uncheck the Annotate box to prevent it from popping up at future bill payments.

The reason for this workflow is because the patron will get a receipt of the "refund", and Evergreen will keep a detailed history of this transaction in the patron's record with the Full details Display being much easier to understand.

**Optional**
Instead of giving the patron a cash refund, a patron credit can be created to pay future bills.
During bill payment,

1. Select *Convert Change to Patron Credit*




2. Refresh the page to display the Credit
   ****Uncheck the *Convert Change to Patron Credit* box when finished****

To use a credit to pay bills,

1. Select the bill
2. In the Payment Type menu, choose “Patron Credit”
3. Fill in Payment Received amount
4. Click Apply Payment.

## Replace a Lost Card

Each patron should have **only one** active card******, except staff, who may have a card at his home library and a card at his work library.

1. Click **Search > Search for Patron** to find the patron's account by name.
2. Retrieve patron by double-clicking on the line with the patron’s information.
3. When the account is opened, click the **Edit** tab.
4. Click **Replace Barcode** and enter the New Barcode
5. The OPAC/Staff Client User Name field will not be updated with the new barcode. This is to prevent changing a username that has been updated by the patron in their OPAC account.
6. Click **Save.**

***Old/Inactive Library Cards* are linked to the patrons record and cannot be deleted. When searching with an inactive barcode, the current barcode will display. Ask the patron to only carry and use the current card. When an old card is scanned at Checkout, the message *Patron account retrieved with INACTIVE card* displays. The best practice is to verify the patron's identity before clicking through the alert by asking for another ID or something similar.

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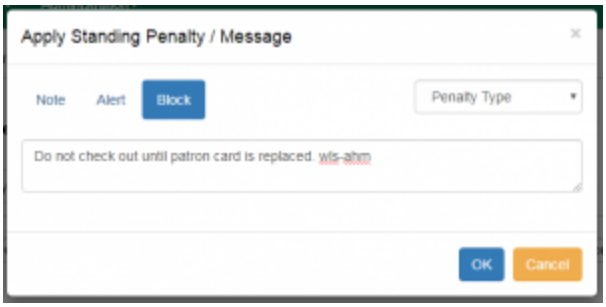
## Blocking Patrons

You may see a Blocked alert on a patron's record from time to time. Often, these are system-generated blocks on patron accounts. For example, patron exceeds fine threshold or exceeds max items out threshold. A notice appears when a staff person tries to checkout an item to blocked patrons, but staff may be given permissions to override blocks.




To apply a bloc, open the Messages tab within the patron's profile. Select Block and create your blocking alert. Be sure to include your initials and 3-letter library code.

## Blocked Vs. Barred

Have you wondered what the difference between barred and blocked is? Barring patrons will stop them from using their library cards and alerts the staff that the patron is banned/ barred from the library. The "check-out" functionality is disabled for barred patrons (NO option to override – the checkout window is unusable and the bar must be removed from the account before the patron is able to checkout items). These patrons may still log in to the OPAC to view their accounts.

**Note:** This is NOT best practice and will only be used in extreme circumstances. Barred can only be applied by certain workstations with specific permissions.

## Renew Card/Update Privilege

1. Retrieve the patron record.
2. Go to Edit.
3. Click **Update Expire Date**. The date will change to three years from "today."
4. Click **Save**.

## Reset a PIN

1. Retrieve the patron record.
2. Go to Edit.
3. Verify the Daytime phone number. Update as needed.
4. Click in the Password/PIN field. Enter the 4 digits to match the last 4 digits of the Daytime phone.
5. Click **Save**. Once the PIN is reset, the patron can change it in their OPAC account if desired.

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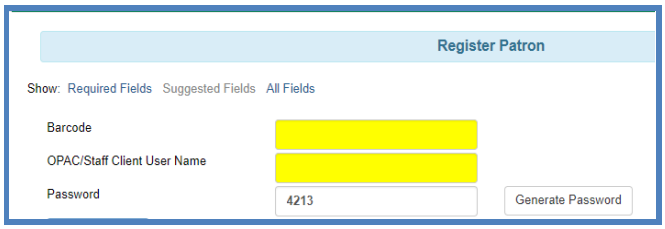
### Claims Returned

1. Retrieve the patron account
2. In the **Items Out** tab, locate the item and right-click to choose **Mark Claimed Returned**.
3. An alert will appear prompting you to enter the date when the item was claimed returned. Use today's date and click **Submit**.
4. The item has now moved to the **Other/Special Circulations** tab.
5. A count of items **Claims-returned** will be listed in the patron's account summary.

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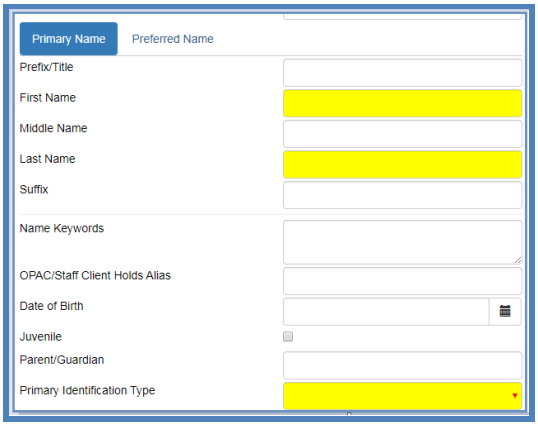
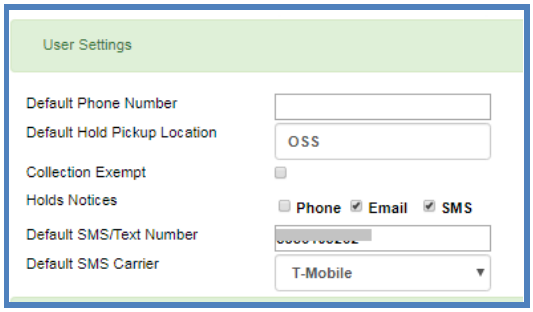
## Patron Registration

Before registering a patron, use Patron Search to verify that they don't have an existing card at a WLS library.

Complete the form (required fields are **YELLOW**)

- **Enter the barcode.**
  **The Password (PIN) will update automatically** to the last 4 digits of the phone number when the day phone number is entered.
- Enter first name, last name in **ALL CAPS**.
  (Enter Middle Initial and Suffix if required)
- Enter Date of Birth if required by your library
- Add Parent/Guardian information if required by your library (DOE, JANE)
- Choose a primary ID Type to show that you checked ID
- Enter email address **in all lower case.** If desired, check *Email checkout receipts by default?*
- Enter a daytime phone with **no spaces or dashes.**
- Verify Home Library
- Choose Main (Profile) Permission Group, Privilege Expiration Date, Internet Access Level (we're not using this), and Active check box will update automatically
- Update User Settings for hold notification.

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a. Enter hold notification phone numbers with 10 digits, **no spaces or dashes**. This assures Evergreen communicates properly with the automatic dialer.

b. Enter email addresses **in all lower case**.

- Enter Address

a. Enter Postal Code (zip code). City will automatically update. Change as needed.

b. Enter Street (1) and optional Street (2)

c. County, State, and Country will update automatically

d. If needed, click New Address to add a second address

e. Choose **Statistical Categories** if your library has contract patrons

**Temporary Library Cards**

Temporary card numbers should only be issued when a potential cardholder wants to check out material at a library other than their Home Library, doesn't already have a card, and is eligible for a WLS card. See more information about eligibility on the WLS website.

**Essentials**

- Check ID. Ask for mail with a street address. Post office boxes may be necessary information for mailing purposes but aren't sufficient as proof of residency.
- Search for an existing record before registering the patron.
- Au pairs, nannies, teachers, students, or others should show proof of employment or school status.

Register the patron as usual except

- Enter a temporary number. Suggested entry schemas
  - LibraryCodeDateNumberOfFirstTempCardThatDay: WNR202203030001
  - LibraryCodeTEMPDateNumberOfFirstTempCardThatDay: WNRTEMP202203030001
  - A regular library card from your library
- Change the Library code to the patron's home library
- Change the Profile to TEMP
- Check out the items on the temporary card. Do not give the patron a physical card.
- Fax or send a copy of the registration information to the home library, *Attention -- Circulation Desk*. If unsure of the home library, call the probable library to verify.

When You Receive Information For a Temporary Card

1. Replace the barcode issued with a new barcode from home library
2. Double-check the record for accuracy
3. Change Profile from TEMP to appropriate profile
4. Save the new information

The patron's home library will dictate how the patron receives their card -- in the mail or in person. Best practice is to mail the permanent card to serve as another address verification and make the patron happy!

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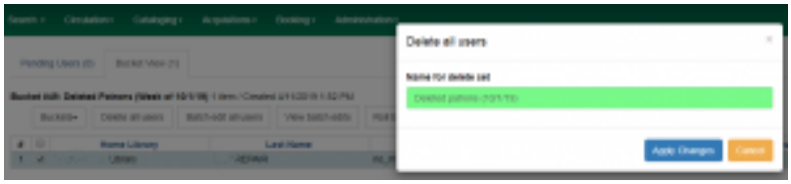
## Delete Patrons




How should you handle a patron card that isn't in use anymore, (as in when a patron moves away or is deceased)? Should the account be deleted or purged? When a patron account is deleted, the barcode won't be usable because it won't be found when scanned. When a patron account is purged (permanently removed), the database is cleaner but recent statistics that are associated with the patron for less than 6 weeks are **lost**.

Best practice is to delete the patron account to make it unusable - and to do it through the User Bucket interface because it also allows you to roll back (un-do) any deletions if necessary.

Follow these steps for each patron account:

1. Search for the patron.

2. In the results list, select the patron

3. Click Add to Bucket. Create a new bucket for Deleted Patrons with the date

4. Go to Circulation>User Buckets

5. From the Buckets list, click the bucket to load it

6. Click Delete all users. Enter a name for the delete set. Click Apply Changes. The card will be deleted.

### Merge patron cards

If a patron has two cards, do not delete either card. Instead merge them.

1. Go to Patron Search and search for the patron by name. Both of the accounts will display in the list
2. Select both of the accounts. Once selected, the blue **Merge Patrons** button will display.
3. Click on it. A screen will open with both accounts displayed in two columns.
4. Review the information for both accounts. Whichever one has the current card information, at the top of the card, click the option "**Use as lead**."
5. Scroll to the bottom of the screen and click on the **Merge Patrons** button in the bottom right corner.

The two cards will be merged with the history of both on the new lead card.

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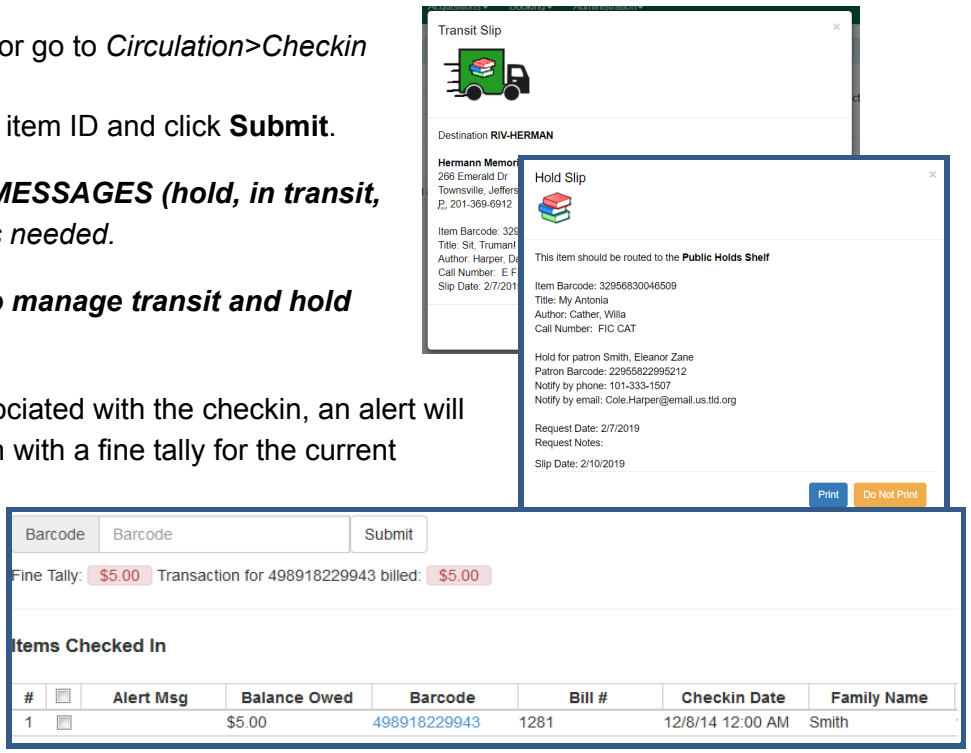
## Checkin

1. From Home, click Check In Items or go to *Circulation>Checkin*

2. Scan the item barcode or type the item ID and click **Submit**.

   - ***WATCH THE SCREEN FOR MESSAGES (hold, in transit, item notes, etc.)*** *Follow up as needed.*
   - ***Click Print or Do Not Print to manage transit and hold slips, etc.***
   - If there is an overdue fine associated with the checkin, an alert will appear at the top of the screen with a fine tally for the current checkin session. To immediately handle fine payment, click the alert to jump to the patron's bill record.

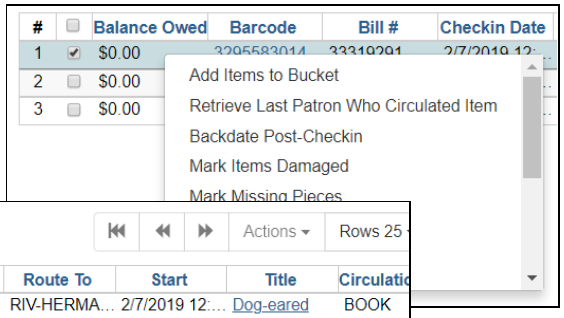


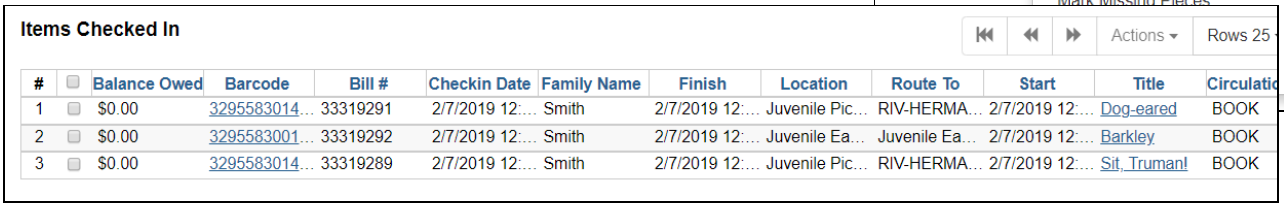

3. Continue to scan items until all items are checked in.

4. When items are checked in, they have a status of **Recently Returned** which changes to Available after 1 hour. The Reshelving status is holdable and can circulate.

### OPTIONS

- Select items and click **Print Receipt** to print a list of the items checked in
- Select one or more items
  - Right-click in a blank area on the selection
  - Choose an action

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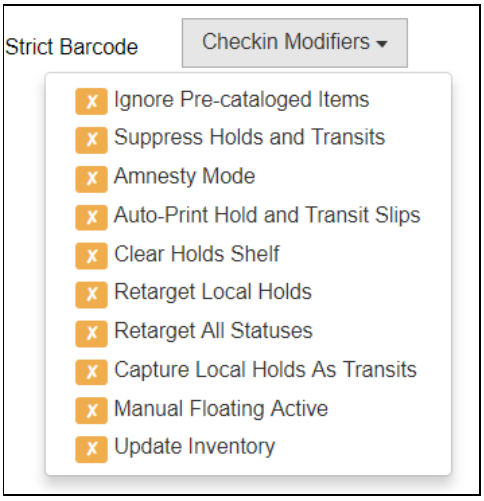
## Checkin Modifiers

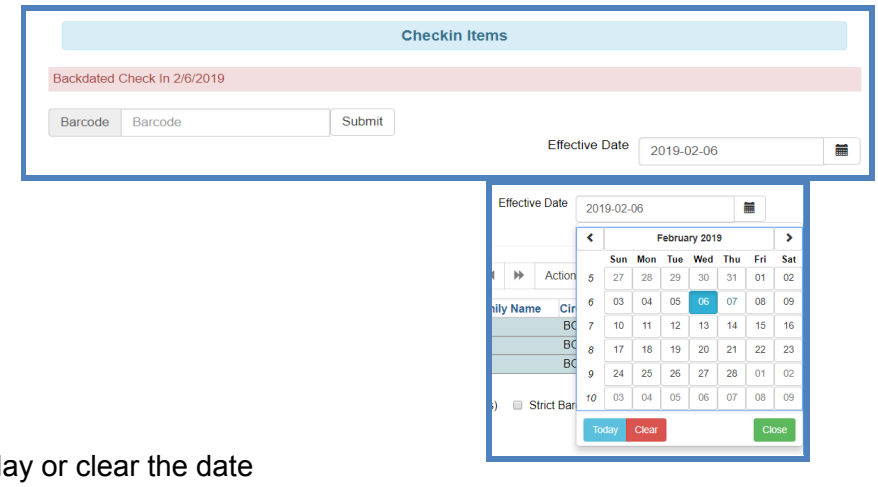
Choose one or more **Checkin Modifiers.**
Checkins are “sticky” until manually unchecked.
Red alert displays at the top of the screen.




- **Ignore Pre-cat Items**: no prompt when checking in a pre-cat item. Item will be routed to Cataloguing
- **Suppress Holds and Transit**: item will not be used to fill holds or sent in transit. Item has Reshelving status.
- ***Amnesty Mode/Forgive Fines***: overdue fines will be voided if already created or not be inserted if not yet created (e.g. hourly loans).
- ***Auto-Print Hold and Transit Slips***: slips will be automatically printed without prompt for confirmation.
- **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 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.
- **Capture Local Holds as Transits**: With this checkin modifier, any local holds will be given an in transit status instead of on holds shelf. This will check in an item without sending a hold notice to the patron. Set item aside and check in later without this modifier when you are ready to notify the patron.

### Backdated Checkin (Bookdrop Checkin)

Use the calendar to change the effective date of checkins




- Red alert displays at top
- To return the effective date to “today”
  - Refresh the page
  - Choose another menu option
  - Use the calendar to return to Today or clear the date

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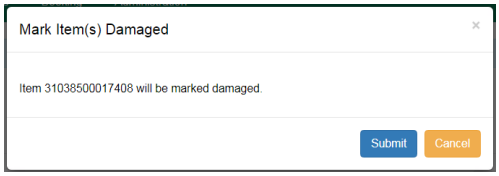
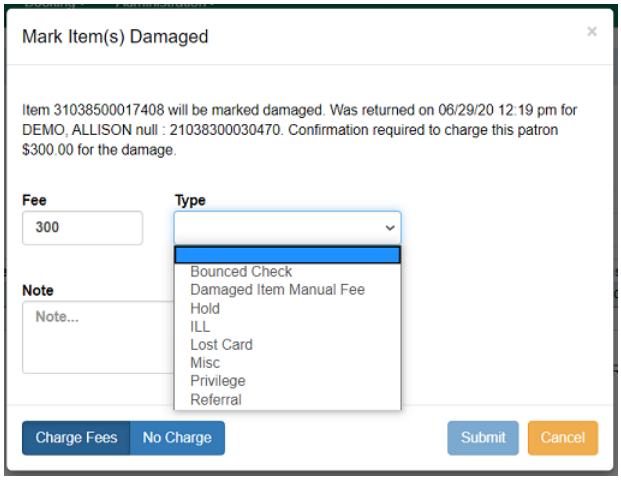
## Mark Item Damaged

To mark an item damaged at checkin,

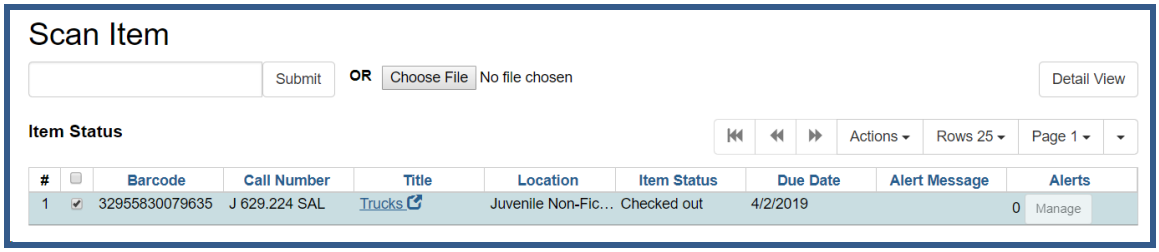



1. Check the item in.
2. Right-click or go to *Actions>Mark Items Damaged*. The Mark Item()s Damaged pop-up displays. Click ***Submit***. The second Mark Item(s) Damaged popup displays item and patron information, the default price, and options for charging the patron.
3. In the Mark Item(s) Damaged popup,
    a. **To charge the full amount**, add a note and click ***Submit***.
    b. **To charge a different amount**,
        i. Enter or use the scroll arrows to choose a different amount.
        ii. Choose the Type *Damaged Item Manual Fee*
        iii. Add a Note
        iv. Click ***Charge Fees***
    c. **To charge no fee**, click ***No Charge***

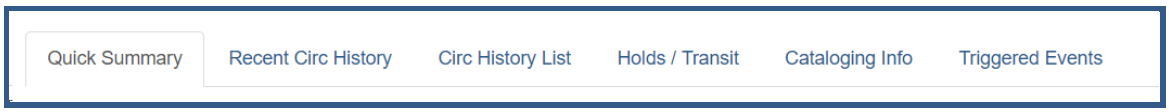



## Search For Item by Barcode

1. Scan an item barcode(s) or enter the ID(s) and click Submit to create a list of item(s).

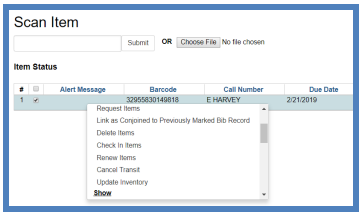



2. Click the **Detail View** in the right-hand corner to display the Item Quick Summary in a new tab




3. Click the **Title** to display the OPAC view of the title record and item information in a new tab

4. Print the list or select item(s) and right-click to take an action.

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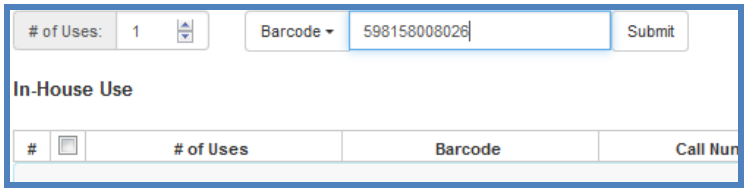
## In-house Use (F6)

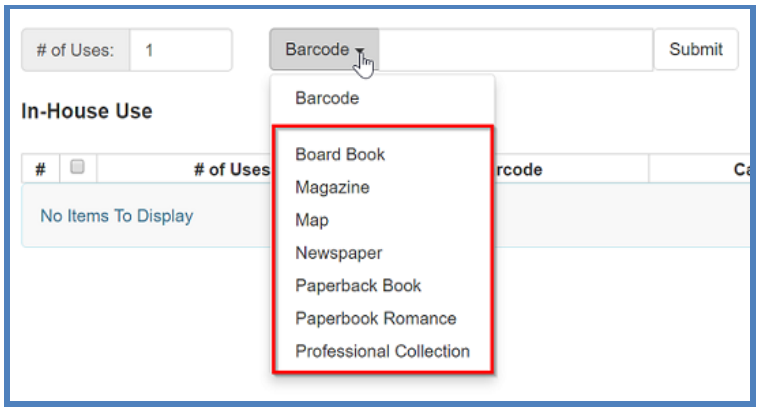
The statistics of in-house use are separated from circulation statistics. The in-house use count of cataloged items is not included in the items' total use count.

Go to **Circulation** → **Record-In House Use** or press **F6**.

- To record in-house use for cataloged items, enter the number of uses, scan barcode.




- To record in-house use for non-cataloged items, enter the number of uses, choose non-cataloged type from drop-down menu, and click **Submit**.

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