Check Out Exceptions

1: Change due date

For items currently being checked out:

- Click **Assist Patrons**
- Enter the patron barcode
- Click **Set ‘Due Date’**

  ![Enter barcode and set due date](image)

- Use calendar to select desired due date

  ![Calendar to select due date](image)

- Enter the barcode of item
- Message displays: “Override: Due date specified is later than that defined by the circulation rule.”

  ![Override message](image)

- Click **Acknowledge**
To revert to the due date specified determined by your circulation policies, click the X to the right of the calendar icon.

For items already checked out:

- From patron record, Checkout tab
- Select item(s) already checked out which need to be changed
- Click Change Due Date

Enter new due date, or use calendar to select

Click OK

Acknowledgment Overrides which will appear for each item selected which exceeds loan policy due date

2: Check Out item already checked out to someone else

- Click Assist Patrons
- Search for, or enter the barcode of, the patron checking out the item
- Enter the barcode of the item to check out (if it is already checked out to someone else)
• An Acknowledgement is required to Override

![Override screenshot]

- Click **Acknowledge** to check the item out to the new patron
- OR
- Click **Cancel** to stop the check out transaction

Depending on your library policy you may be required to check who has the item checked out and if overdue charges have accrued. Any accrued charges will be removed if the item is checked out to the new patron without first checking it in.

### 3: Check Out item to blocked patron

- Click **Assist Patrons**
- Search for, or enter the barcode of, the patron checking out the item
- Enter the barcode of the item to check out
- If the patron is blocked, the system prompts with an Override message. Examples include:
  - Patron account has expired
    ![Checkout Error screenshot]
    - The patron account has expired
    - OK
  - Overdue fine limit exceeded
  - Patron manually blocked
    ![Acknowlegements screenshot]
    - The Patron has exceeded their outstanding fine limit. The patron is blocked.
    - Acknowledge
    - Cancel

- An Acknowledgement is required to Override the block
  - Click **Acknowledge** to check the item out to the blocked patron
  - OR
  - Click **Cancel** to stop the checkout transaction
4: Check out item that is on hold for another person

- Click Assist Patrons
- Enter the patron barcode
- Enter the item to check out
- If item is on hold for another patron, message displays: “ Overrides: There is a hold pending for this item.”

![Notifications Message](image)

- Depending on your library’s policy, either:
  - Click **Acknowledge** (patron with item on hold will not lose their position in the hold queue)
  - OR
  - Click **Cancel**

**Simulation:**

- Check out item to blocked patron:

**Related Videos**

See the Check out items playlist at

---

**Check In Exceptions**

5: Check In item that has a hold

- Click **Check In**
- From the **Print Option** drop-down menu, select **Network Printer**
- Enter the barcode of the item
- Notice in Action column: HOLD
- Notice the Hold Receipt that displays in Print Preview
- After viewing the Hold Receipt, click Print button or **Cancel** in Print Preview
6: Check In item belonging to different branch

- Click **Check In**
- From the **Print Option** drop-down menu, select **Network Printer**
- Enter the item barcode of the item you just checked out, that belongs to a different branch
- Notice in Action column: SEND TO: (branch)
- Notice the Routing Receipt that displays in Print Preview
- After viewing the Routing Receipt, click Print button or **Cancel** in Print Preview

**Related Videos**

See the Check in items playlist at
https://help.oclc.org/Library_Management/WorldShare_Circulation/Training/Videos

**Claims (Claimed Lost, Claimed Returned, Claimed Never Had)**

7: Claimed Lost

- Click **Assist Patrons**
- Enter the patron barcode
- From the checkout list, select item(s) which the patron claims are lost
- Click **Change Status**
- Choose Claimed Lost from dropdown menu

- Click **Change**
- The Long Overdue and Lost Policy is applied for charges to the patron.

8: Claimed Returned

- Click **Assist Patrons**
- Enter the patron barcode
- From the checkout list, select item(s) which the patron claims they returned
- Click **Change Status**
- Choose **Claimed Returned** from dropdown menu
- Enter **Date Claimed** returned

![Change Item Status](image)

- Click **Change**

**9: Claimed Never Had**

- Click **Assist Patrons**
- Enter the patron barcode
- From the checkout list, select item(s) which the patron claims they never had
- Click **Change Status**
- Choose **Claimed Never Had** from dropdown menu

![Change Item Status](image)

- Click **Change**

**NOTE:** In all Claims cases, if the item which was claimed (lost, returned, never had) is found and checked in, the claim count against the patron is reduced.