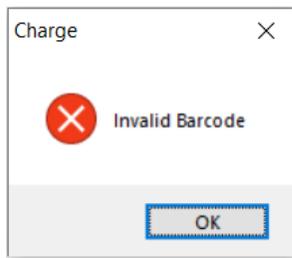


## Possible Messages/Big Red Boxes at Checkout

**Invalid Barcode:** When a patron barcode or item barcode is entered incorrectly. The only option is to acknowledge the box and try entering the barcode again.



**Patron Not Found:** The Patron Not Found exception will display when searching by a patron name and no names match the search data entered. The only option is to click OK and try using another search method to locate the patron.



**Patron Not Found, Entered Barcode Not in Use:** This will display when a barcode not associated with a Patron Account is scanned into the Charge function. Selecting Register Patron will take you to the Patron Information Registration screen, and you can create a New Patron Account using this barcode. Clicking Cancel takes you back to the Charge screen, and you can scan another barcode. \*\*Before creating a new Patron Record with the unidentified barcode, PLEASE verify this card OR, just use a brand new one.

**Patron Exception – Delinquencies:** If a patron currently has delinquencies (fines, fees, overdues, Lost) but not enough to block privileges, the Patron Exception – Delinquencies box will display when you scan the barcode. Click OK to continue to Charge, OR, click Pay, to negotiate any fines.

## Possible Messages/Big Red Boxes at Checkout

Patron Exception - Delinquencies

**Delinquencies**

OK Pay

**Details**

<input type="text" value="0"/>	Overdue Items	
<input type="text" value="0"/>	Lost Items	<input type="text" value="\$0.00"/>
<input type="text" value="0"/>	Fines	<input type="text" value="\$0.00"/>
<input type="text" value="2"/>	Manual Fines	<input type="text" value="\$4.00"/>
<input type="text" value="0"/>	Processing Fees	<input type="text" value="\$0.00"/>
<b>Total Owed:</b>		<input type="text" value="\$4.00"/>

**Patron Exception – Hard Block:** A hard block on a patron’s account prevents a patron from charging out additional items. A hard or system generated block is placed on the patron account by a batch overnight program when a patron exceeds a pre-set delinquency threshold. Staff will need to take action before proceeding with charging. Override Block will enable you to charge items to the patron while retaining the block on the account. Staff should be able to override as needed for these accounts.

Clicking close will retain the hard block and deny any charges to the patron.

Patron Information will take you to the patron’s information. Here, you can negotiate and delinquencies and then return to the Charge session.

Patron Exception - Hard Block

**Patron Delinquent**

Override Block

Close

Patron Information

**0 Overdues, 1 Claims Returned**

<input type="text" value="0"/>	Fines:	<input type="text" value="\$0.00"/>	<input type="text" value="3"/>	Lost Items:	<input type="text" value="\$66.66"/>
<input type="text" value="2"/>	Manual Fines:	<input type="text" value="\$1.50"/>	Total Charge:		<input type="text" value="\$68.16"/>

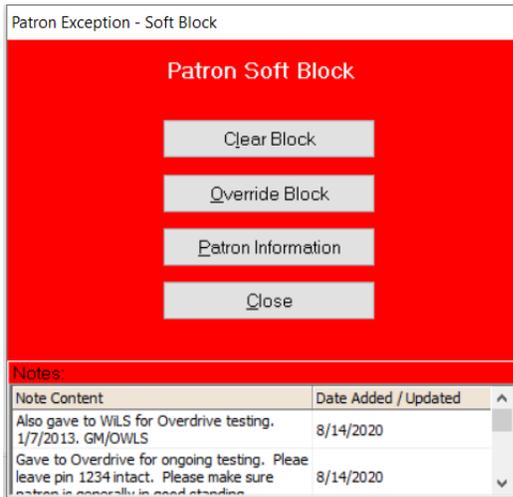
**Patron Exception – Soft Block:** When you want to alert staff about a particular issue but not block a patron from checking out and placing holds, you can change the patron’s status to Soft-Blocked and add a note to the account. The Soft-Block exception message and notes will display the next time the patron barcode is scanned.

Clear Block will remove the Soft-Block status and return the patron’s status to Good. The Charge window will then display, and materials can be charged to the patron.

## Possible Messages/Big Red Boxes at Checkout

Override Block will leave the Soft-Block in place and allow you to charge materials out to the patron. The next time the patron's card is scanned, the Soft-Block exception will display.

Patron Information will take you to the Patron information screen. You can view areas that need resolving as needed.



Note Content	Date Added / Updated
Also gave to WILS for Overdrive testing. 1/7/2013. GM/OWLS	8/14/2020
Gave to Overdrive for ongoing testing. Please leave pin 1234 intact. Please make sure notes is correctly in good standing.	8/14/2020

**Patron Registration Expired:** When a patron's card has expired, the Patron Registration Expired box will display. This provides staff the opportunity to modify the Expiration Date immediately. Once a new date is entered into the Expiration Date field, the Save New Expiration Date icon will be clickable. Once you have saved, you can continue to Charge material to the patron.

Close will close the exception box without making any modifications to the account and without pulling the patron into Charge.

Patron Information will bring you to the patron account where you can view any information as needed.

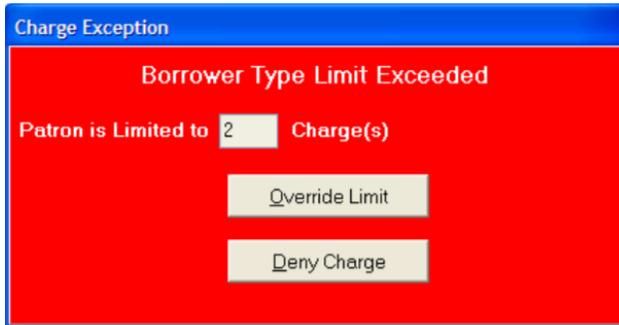


## Possible Messages/Big Red Boxes at Checkout

**Borrower Limit Exceeded:** Patrons are limited on how many items they can check out based on their patron card type. When they have reached that limit, this box will display and will inform staff of the number of items the patron is limited to.

Override Limit will allow for the patron to check out the additional item.

Deny Charge will not charge the item to the patron.

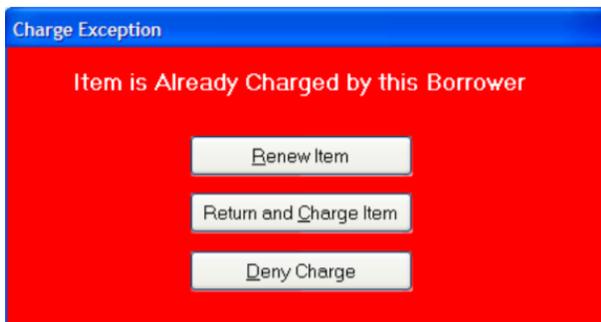


**Item Already Charged by this Patron:** When an item is already charged to a patron is scanned in Charge for the same patron, this box will come up.

Renew Item will attempt a renewal of the item for the patron. If the renewal allowed, the Due Date is updated. If it is denied, the reason for the denial is displayed in the Big Red Box. This will be counted as a renewal.

Return and Charge Item will return the item first and then charge it again to the same patron. This will not count as a renewal, but an additional charge.

Deny Charge will not charge the item to the patron. It will remain charged as is to the patron.



**Non-Circulating Item:** Any item that has a rule that prevents it from circulating will receive this error message when scanned for Charging. Staff will have the option to Deny the charge or to Permit the charge. Staff need to make sure the correct date is in the Due Date field before clicking "Permit Charge."

## Possible Messages/Big Red Boxes at Checkout

The screenshot shows a 'Charge Exception' dialog box with a red background. The title is 'Non-Circulating Item'. There are two buttons: 'Deny Charge' and 'Permit Charge'. Below the buttons, the 'Due Date' is set to '08/30/2021'. At the bottom, there are three input fields: 'Branch: OWWAU', 'Location: AREF', and 'Media: ABK'.

**Item is Charged to Another Patron:** When an item already charged to a patron is scanned to be charged to another patron, staff will get this exception box. Staff can choose to either return the item from the initial patron and then charge it to the current patron. Or, they can deny the charge, leaving it checked out to the initial patron.

The information at the bottom of the box displays the patron who currently has the item charged, the day it was checked out, the due date and any fines associated with the item.

The screenshot shows a 'Charge Exception' dialog box with a red background. The title is 'Item is Charged to another Patron'. There are two buttons: 'Return and Charge Item' and 'Deny Charge'. Below the buttons, there is a section titled 'Charged To:' with four input fields: 'PatronID: 21389006699856', 'Out: 8/16/2021', 'Fine: \$0.00', and 'Due: 9/13/2021'.

**Item on Hold Shelf:** If one of the items being charged to a patron has outstanding holds on it for another patron, then the Hold Shelf exception box will display.

Deny Charge will not charge the item and will leave it on the hold shelf for the patron displayed in the Hold Information panel.

Charge and Satisfy Hold will charge with item to the charging patron and remove the hold for the requesting patron. This option is useful in the scenario of a parent picking up holds for their children.

## Possible Messages/Big Red Boxes at Checkout



Charge Exception

On Hold Shelf At: ANGMSA

Deny Charge

Charge and Satisfy Hold

Charge and Place First in Queue

**Hold Information**

Patron ID: 27244050676835 On Hold: 12/14/2009

Patron Name: CLINE PATSY

**Patron Has Books on Holdshelf:** When scanning a patron barcode, if they have items waiting for them on the hold shelf, then the Books on Holdshelf exception box will display.

OK will acknowledge the notice and allow you to begin charging materials to the patron.

Patron Info will take you to the Patron account and allow you to find out what material(s) are waiting for the patron.



Exception

Patron Has Books On Holdshelf

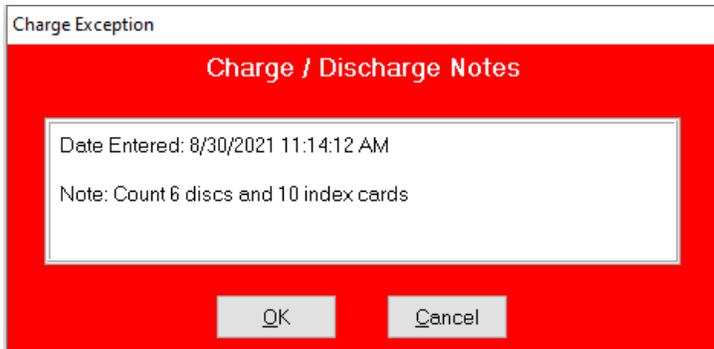
OK Patron Info

**Charge/Discharge Note:** Charge/Discharge Notes may be placed on items to alert staff, at the point of Charge or Return, that there is something to be noted about the item. If there is a note on an item, then the Charge Exception box will display each time the item is charged or returned, until the note is removed manually by staff.

OK will acknowledge the note and allow staff to continue charging or returning the item.

Cancel will not charge the item and allow staff to continue in Charge. The item will remain with an On Shelf status.

## Possible Messages/Big Red Boxes at Checkout



**Media Limit Exceeded:** Patrons are blocked from checking out additional items than the system allows through the media codes. The system has the max limits set and then individual libraries can manage their limits locally. If a patron exceeds the system limits, then the below exception will display.

Override Limit will allow staff to override the checkout limits this one time and allow the item to be charged to the patron.

Deny Charge will not allow the patron to check out the item. The item will remain with an On Shelf status.



**Item Not Converted:** If an item is scanned into Charge but the item number is not in the holdings file, the Item not Converted exception box displays. Meaning the item does not exist in the database. Staff can temporarily add the item in by using the “On-the-Fly” procedure for CARL-X. This will create a temporary bib for the item.

Create Temporary will create a temporary bib record for the item. All information needs to be filled out BEFORE clicking this button. Enter in as much information as you can.

Search will display the Companion Searcher window and allow staff to search for the title in your library’s collection. If found, staff can select it back and the title, author, call number, and pub year will be populated. Staff should then fill in Branch, location, media and then click the Convert Item button.

Deny Charge will not charge the item to the patron. The item will remain as Not Converted.

## Possible Messages/Big Red Boxes at Checkout

Convert Item will only become active after staff select title back from Companion Searcher using the Search button. Staff can save the item to attach it to the full bib record selected and charge the item to the patron.



The screenshot shows a dialog box titled "Charge Exception" with a red background. At the top, it says "Item Not Converted". Below this, there are three buttons: "Create Temporary", "Search", and "Deny Charge". A "Convert Item" button is also present. The form contains several fields: "Publication Year:" with an empty text box; "Item ID:" with the value "31730000054643"; "Price:" with the value "\$0.00"; "Author:" with an empty text box; "Branch:" with a dropdown menu showing "EAST"; "Title:" with an empty text box; "Location:" with a dropdown menu showing "YCIRC"; "Call Number:" with an empty text box; and "Media:" with a dropdown menu.

**Change Borrower Type – Juvenile to Adult:** When a juvenile patron has reached the “Grow-Up” age, then the database will prompt staff to update the patron account to an adult patron type.

Change Later will close the box and take staff into the Charge function, ready to check out.

Close will close the box and take staff to the Charge screen without the Patron Account loaded.

Patron Information will take staff to the Patron Account to update the patron type.



The screenshot shows a dialog box titled "Patron Exception - Birthday" with a red background. At the top, it says "Birthday - Change Patron Type". Below this, there are three buttons: "Change Later", "Close", and "Patron Information".