Check out exceptions

Learn about check out exceptions and working around check out exceptions. In the Checkout page of the patron record, when you scan or Enter barcode of an item to check out, there may be an exception message for you to override or cancel.

Check out an item not checked in

A message appears for you to Acknowledge or Cancel if you attempt to check out an item already checked out to or on hold for another patron. The system can automatically check in the item and then check out to the current patron if you Acknowledge override.

- If you Acknowledge override, the item is issued to the new patron. See Circulation account roles, Overrides for information regarding which roles are capable of overriding the alert.
  - Note: Any fines accrued for the item will not be assessed to the previous patron. If that patron has fees previously billed for long overdue and lost materials, these will remain, even with an override.

- If you Cancel, it stops the check out. You can find out who currently has the item on loan.
  1. Use Discover items and enter the item barcode.
  2. In the Item Details you will see who has the item on loan. If you click Statistics in the top right, this shows any overdue fine.
  3. If you use Check In for the item, this adds the cost of the accruing fine to that patron.
  4. When you check out to the new patron, the exception is gone, and the item is immediately checked out to the new patron.

Fees previously billed for long overdue and lost materials will remain with the previous patron, even with an override. You may want to review the previous patron’s record and reverse the charges if perhaps the item was on the shelf all along.

Watch a video

Circulation: Check out an item not checked in (9:11)

One of the exceptions you may encounter when checking out items to patrons is that the item is currently checked out to someone else. Acknowledge the override to check the item out to the new patron, or Cancel the override and check in the item before checking it out to the new patron.

This video demonstrates considerations you may wish to make to check the previous patron. Accrued fines are not assessed to the current patron if the override is acknowledged. Fees previously billed for long overdue and lost materials remain even with an override.
Check out noncirculating items

1. A message alerts you that the scanned item is a reference book (or fits another category defined by policy) and does not circulate.

2. In the message dialog, click Cancel to cancel the check out. Depending on your loan policy, a supervisor may type an override code in the text box. Click Acknowledge. See Circulation account roles, Overrides for information regarding which roles are capable of overriding the alert.

   If you authorize the check out, the check out confirmation message appears in the workspace. The noncirculating item is added to the Checked Out Items list.

Note: Your loan policy may prevent non-circulating items from check out, without any option to override. A message states that the loan policy prevents this item from being circulated and that your administrator may be able to change your loan policy. You can only click OK and the item cannot be checked out.

Check out items to a blocked patron

1. A message alerts you that the patron is blocked. Patrons are blocked for a variety of reasons:
   - Automatic block: The patron has exceeded the fine limit, checked out too many items, etc. Automatic blocks are controlled by your institution's circulation policies.
   - Manual block: The library has blocked the patron account in the patron record.

2. In the message dialog, click Cancel to cancel the checkout. Or type an override code in the text box. Click Acknowledge. See Circulation account roles, Overrides for information regarding which roles are capable of overriding the alert.

   - If a patron account has expired, update the Expiration Date in the patron's profile. Overrides to allow circulation activity are not available for expired accounts. See Patron record details, Profile for more information.

3. If you authorize the check out, the check out confirmation message appears in the workspace. The item is added to the Checked Out Items list.

Note: Your assigned account role(s) may prevent you from overriding a patron block. If "Supervisor Required" appears in the message dialog, a supervisor's override credentials are required to complete the action. See Circulation account roles to learn more about when a supervisor's override credentials are required.

Watch a video

Overrides (4:39)

In this four-minute video, you'll learn how to process exceptions to your library's circulation policies (such as checking out a non-circulating item), and when this requires override credentials.