Check in items

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Learn how to perform a standard check in.

Standard check in

1. On the left panel click Check In.
2. The default Check in Mode should be at Auto.
3. Select a Receipt Option.
4. Scan or enter the barcode into the Item Barcode field. If using a scanner it typically reads and processes the check in with each scan. If typing in the barcode you will need to press Enter or click the Check In button.
5. Scan or type additional items.

Each item appears in the Check In list, including the name of the patron each item was on loan to.

Note: The Action column tells you what you need to do with the item next.

The Hold or routing slip prints, if the printing option is chosen and the item needs to be held or routed. The Email Preview window will appear if the email option is selected.

(Optional) Click Clear to clear the list of returned items from the Check In screen.

Watch a video

Check in (4:46)

In this five-minute video, you’ll learn how to check in materials in WorldShare Circulation, including printing or emailing a check in receipt, and processing items that fulfill a hold or need to be routed to another branch.

Check in mode

The standard check in above uses the Auto (default) mode. You can choose another check in mode:

- **Auto (default):** Use for normal transactions. Auto mode performs all of the normal actions associated with check-in (removes the item from the patron record, triggers a hold, sends the item to a shelving or pickup location, etc.).
- **Non-loan Return:** Use to check in items that were used, but not checked out (items from the reference collection, items that are on reserve, or items found in a reading room). This mode updates the item’s Soft Issued Count on the item Statistics screen.

https://help.oclc.org/Library_Management/WorldShare_Circulation/Check_in/010Check_in_items
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• **Inventory**: Use when conducting an inventory (for example, you are performing a shelf-read and scanning barcodes of items that are present). This mode updates the item’s Inventoried Count and Last Inventoried date on the item Statistics screen. In the future, the ability to conduct a full collection inventory will be added to WMS.

• **Delete Hold**: Use to delete a hold on an item that is on the pickup shelf, but has not yet expired. This mode checks the item in and cancels the hold for the patron that had been notified that the item was ready for pickup.

**Print or email receipt (Optional)**

**Select a Receipt Option**

- **Do not print**: Check in items without printing hold or routing slips.
- **Email**: Use to email check in receipts, hold slips, or routing slips.
- **Printer**: (network or receipt printer, if available): Use to print check in receipts, hold slips, or routing slips.

**Print a receipt**

1. Select the items by clicking the check box next to the item's Title. To select all items, click the check box at the top of the first column.
2. In the Receipt Option list at the top of the screen, select your **printer**.
3. Click **Receipt**.
4. Click **Print**.

**Email a receipt**

1. Select the items by clicking the check box next to the item's Title. To select all items, click the check box at the top of the first column. The email option will only display if all items selected are for a single patron.
2. In the Receipt Option list at the top of the screen, select **Email**.
3. Click **Receipt**.
4. Click **Email**.

**Notes on emailing a receipt**

- Receipts use the email address provided in the patron's record.
- If there is no email address in the patron record, the Email field will be empty. In order to send the patron an email receipt, you must add their email address to their patron record and then resend the receipt.
- If the patron wants the email to be sent to a different email address, you can edit the email address on the Email Preview window.
- Changing the email address on the Email Preview window does not change the email address in the patron record.

For more information on receipts, see [Circulation Receipts](https://help.oclc.org/Library_Management/WorldShare_Circulation/Check_in/010Check_in_items).
Backdate check in (Optional)

Backdating the check in date of items will remove any accruing fines a patron incurred after that date. Reasons for backdating may include a facility emergency, weather related closing, or a staff in-service day.

Note: To avoid the need to backdate the check in date, enter regular and special hours in the WorldCat Registry. See Open Hours for more information.

1. Click the calendar button next to the Check In Date.
2. In the calendar window, click a date to select the new check in date.
3. Click the time box below the calendar to select a new check in time.
4. The window closes and the system displays the date you selected.
   ◦ The specified check in date remains in effect until changed.
5. After specifying the date and time, check in the items to be backdated.

Watch a video

Backdate check in (03:54)

There may be times when you need to backdate the check in date of items. This training video shows how to backdate an item at check in.

Status of checked-in items

Checked-in items have the status Recently Returned for the length of time set in Service Configuration (WorldShare Circulation > Location Policy). For more information, see Location Policy. For more information on statuses, see Item statuses.