Selecting a Patron

On the Patron Identification page (Fulfillment > Checkout/Check-in menu > Manage Patron Services), enter a patron’s name in the Scan patron’s ID or search for patron field, using one of the following methods:

- Enter part of a user’s identifier, such as a name or an email address, etc. Select the required user from the list, and click Go.

To loan a requested item:

1. On the Patron Services page, click the Loans tab. In the Scan item barcode field, scan in or manually type the barcode of the requested item.

The items will form a list under the scan in barcode field in the order in which you scan them.

Patron Services Loans Tab

1. To view all loans for the selected patron, from the Loan tab, click the drop down menu next to the “loan display” filter and select “all Loans”.
Other Actions

In the list of available loans on the selected patron account, to the far right of the table is a menu button:

Click this button to open the menu and access the action options available for the selected loan. The below section defines the available options: Note: the options available may be subject to your assigned Alma roles and permissions. Please check with your supervisor if you do not have action options you feel you should.

- **Renew** – Renew an item.
- **Work order** – Creates a request; you can select a work order or other request.
- **Lost** – Specifies that an item is lost and charges the patron.
  - Click OK to add the details of the loan to both the Loan Status column of the Patron Services page and to the Fines/Fees tab of the User Details page.
- **Loan history** – View a history of the loan.
- **Claimed Return** – Claim an item as returned. When claiming an item as returned:
  - The loan’s status is changed to Claim Returned.
  - The item’s Process Type value is Claimed Returned, and the item remains requestable and is considered to still be on loan.
  - By default, overdue fines accumulated prior to the item being claimed as returned are applied to the patron’s active balance, but no new overdue fines accrue from that point onward.
- **Delete loan** – Deletes the item from the Loans tab. The item’s status changes to Missing (for lost loans) or In Place (for other loans). Note: Do not use this option unless approved by your circulation supervisor
- **Change due date** – The loaned item’s due date can be changed at or after the loan time.
- **View notes** – View notes on the loan.
- **View queue** – Enables you to view other hold requests that have been placed on the item.

Returning Items

Loaned items can be returned in either of the following ways:

- **Within a Patron’s account** – Select the return tab in the patron’s account and begin scanning the barcodes of the items they wish to return. Scenario: a patron is borrowing items or asking questions about their account and then hand you something to return:
- **Bulk** – For items loaned to more than one patron; Scenario: emptying a return bin or truck. From the Fulfillment menu OR from the Manage Patron Services screen, select the returns link or click the “Go to Return Items” button (respectively):

  Begin scanning in the barcodes of the items returned in the “Scan item barcode” field. Use the “override return date and time” field when you are returning items after a closed business day or other return policy exception. Consult with your supervisor:
To modify the return date, select the Calendar icon on the far right of the "override return date and time" field and select the desired return date from the calendar. Note: you must click on the actual day of the desired return date or Alma will not record it.

**Manage Item Returns Page**

In some cases it is necessary to modify the return date after or during a bulk return. As you scan the items to return them, they form a tabled list below the scan in item barcode field. The date is modified as follows:

1. On the Manage Item Returns page, click the menu on the item in question. Select the **Select Return Date** option. The Select Return Date dialog box opens.

![Select Return Date dialog box](image)

Select the desired date (and time if applicable) and click apply. Then click submit to save.
2. If necessary, select one of the following options from the menu next to the desired returned item:

- **Work order** – Creates a request; you can select a work order or other request (see step 2 in [To create a request](#)).

- **Loan history** – Displays an audit trail of an item's loan history (see [To view loan notes](#)).

- **View notes** – Displays notes on the loan (see [To view loan notes](#)).

3. Click **Exit** to exit the page, or click **Go to Patron Services** to open the **Patron Identification** page.