Checking Out & Modifying Due Dates in Leap

Checking Out
Locate a patron record. Scan the patron's library card, driver's license, or key their barcode into the Quick Search bar.

Or, if needed, click on Find to open the Find Tool.

In the Find tool, select Patron from the record type dropdown.
Select your search type and enter in your search criteria according to your local procedures.

Once you’ve entered in your search term, select the search icon to launch the search.

Select the correct user from your search results, and click Open.
In the patron’s account, select the Check Out tab.

Scan or key in item barcodes in the box that says, “Scan or enter item barcode.”

If the patron’s account is blocked, a pop-up message will notify staff. From this view, staff can cancel the checkout and resolve the block or, depending on your permission levels, select “Continue” or have a supervisor enter an override to check the item out.
As items are scanned, pop ups appear at the top of the screen confirming if the checkout was successful (shown below) or unsuccessful (a red pop up).

If you cancelled the checkout, a yellow pop up appears confirming the transaction was cancelled. A running list of items checked out appears under the scan box.
During checkout, you may also encounter items with blocks. After the item is scanned, a pop up will appear with a block alert. From this view, you can: cancel the checkout, view the item record to investigate further, or (depending on your permission levels), select “Continue” or have a supervisor enter an override to check the item out.

When all items are checked out, select “Complete” to finish the transaction and close the patron’s record. If not, Leap will prevent the workform from closing until “Complete” is selected.

Once the transaction is complete, Leap closes the patron’s record and prints a checkout receipt (depending on your library’s settings, a receipt may automatically print or prompt you to print).

Modifying Due Dates
Special Loan
There are two ways to change item due dates during a checkout transaction. The first method, using the Special Loan tool, is used for changing due dates BEFORE items are scanned.
To use, click on “Special Loan.” Use the calendar to select the new due date or enter a value in the Loan Period box. You can also opt to apply this due date only to the next item scanned or to all the items in this session. Click “OK” to apply the changes.

*Remember: the new date will apply only to items scanned after the special loan date is set.*

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**Reset Due Date**

The Reset Due Date tool is used to change due dates AFTER items are scanned.

To activate this tool, one or more items from the list of checkouts needs to be selected. You can select the items one at a time or click on the checkbox at the top of the list to select all. Once items are selected, click “Reset Due Date.” A calendar will open and you can select the appropriate date.