How to loan an item to a TRAC walk-in borrower

1) Navigate to ‘Manage Patron Services’ in Alma (i.e. Alma→Fulfillment→Checkout/Checkin→Manage Patron Services).
2) Check the box labeled “Find user in other institution.”
3) A new drop-down option for “Institution” will appear (see image 1 below).
4) Select the relevant institution (e.g. Hawkeye, Iowa State, University of Northern Iowa, etc.).
5) Scan patron’s ID and hit return or click the “Find User” button.
   a. The magnetic stripe or barcode might not locate the patron’s record at their home institution, so you might have to type in the number printed on the patron’s ID card.
   b. If you are typing in the ID number, you will need to disregard the zeros and start with a whole number. Ex. 000136592
   c. You cannot search for a patron by name if this is the first time they are a walk-in borrower to the University of Iowa.
6) A new patron record will appear (see image 2 below) with basic information from their home institution (First Name, Last Name, email address, and expiration date). An ID will be automatically assigned.
7) Click on the “Update User” button.
   a. If the patron record has already expired, you will get a pop-up notice informing you that the patron’s record is expired (see image 3 below). Hit cancel as we are not to override any policy from their home institution. They will be unable to check out materials until they can resolve the issue at their own institution.
8) Scan in the barcode of the item and hit return or click the “OK” button.
9) They should then receive a 90 day loan for their items.

Image 1