

## # Lock Out Item Check Out Process

7 Steps

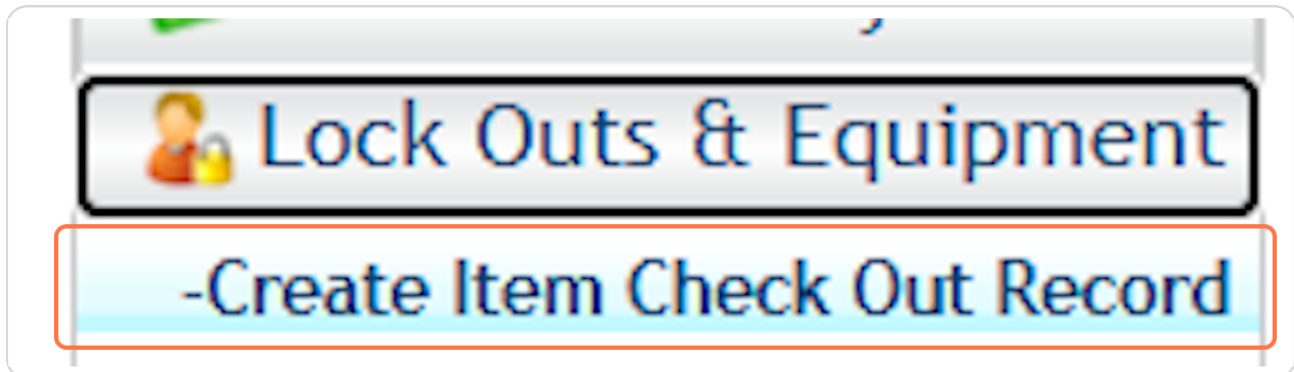
### STEP 1

Click on Lock Outs & Equipment Module



### STEP 2

Click on -Create Item Check Out Record



### STEP 3

#### Enter Student's PID

**Person:**


**PID:**

Walck4, Meggers4 (Test)

### STEP 4

#### Click on Run

**Person:**



## STEP 5

Select Applicable Community and Bed Space then click "NEXT"

Person: Walck4

**Basic Student Information & Item Check Out History**

PID:

Cell Phone:

Lived First Name:

UCSD Email:

Last Name:

**STEP 1: Select student's community & bed space as it relates to item check out**

Housing Community:

Select applicable bed space:

Bed Space	Term	Move In	Move Out
<input checked="" type="checkbox"/> SW-0407-1a	24 25 UG Housing	10/21/2024	6/14/2025

## STEP 6

Select Lock Out from Item Check Out Type:

Person: Walck4, Meggers4 (

**Basic Student Information & Item Check Out History**

PID:

Cell Phone:

Lived First Name:

UCSD Email:

Last Name:

**STEP 2: Ensure that you have selected the student's current assignment:**

**STEP 3: Lock Out or Equipment Check Out**

Select if the student is locked out of their space or checking out equipment from your office.

## STEP 7

**Select Lock Out Item(s) Issued, required return date & time in addition to who checked out the items to the student and then click "Finish"**

**Lock Out Items include:**

- Exterior Door Unlock Code ONLY (If selected, there is not physical item to return, however the lock out is still captured and moved to the housing locations archived list)
- Wifi Persona E-Lock Keycard ONLY
- Offline Persona E-Lock Keycard ONLY
- Bedroom Key ONLY
- Bedroom Key & Exterior Door Unlock Code
- Bedroom Key & Wifi Persona E-Lock Keycard
- Bedroom Key & Offline Persona E-Lock Keycard

The student receives an email confirmation which includes what was checked out and the requested time of return. The record will now appear on the housing location's "Pending Checked Out Items" list

Person: Walck4, Meggers4 (1)

**Basic Student Information**

PID:  Cell Phone:

Lived First Name:  UCSD Email:

Last Name:

**STEP 4: Select what items are issued to the student**

Lock Out Item(s) Issued:  \*

Return Item(s) By:      \*

**STEP 5: Click "Finish" below to check item(s) out**

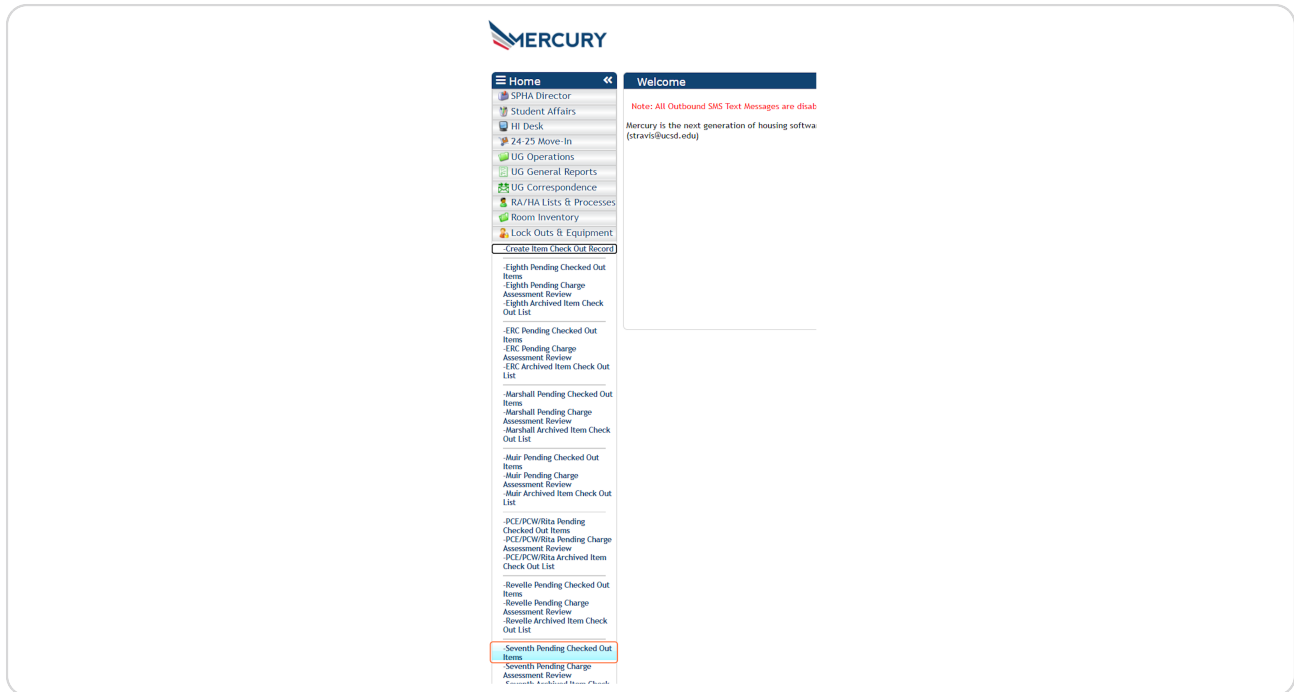
Name of Staff Checking Out Item(s):  \*

## # Logging Item Return

8 Steps

## STEP 8

**When the item is returned, click on the housing location's "Pending Checked Out Items" list**



## STEP 9

**Click on "Show Me List"**

The screenshot shows the 'Seventh Pending Lock Out & Equip Check Out' search options form. The form includes fields for PID, Lived First Name, Last Name, Living Area, Item Check Out Type, Description, On Date, and Advanced Selection. The 'Show Me List' button is highlighted with a red box.

**Seventh Pending Lock Out & Equip Check Out**

**Search Options**

PID  Item Check Out Type

Lived First Name  Description

Last Name

Living Area  On Date m/d/yyyy

Advanced Selection

Sort by

**Show Me List**

## STEP 10

Locate the record for the checked out item and follow the "I want to...Update Return & Condition of Items" link

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Time	Return Item(s) By	More Actions
1:24 PM	12/5/2024 11:00 PM	<a href="#">I want to...</a> <a href="#">Update Return &amp; Condition of Item(s)</a>

of 1

## STEP 11

Select the applicable bed space and then "Next"

**Basic Student Information**

PID:  Cell Phone:

Lived First Name:  UCSD Email:

Last Name:

**STEP 1: Select the Booking that Pertains to Checked Out Item(s)**

	Bed Space	Term	Move In	Move Out
<input checked="" type="checkbox"/>	SW-0407-1a	24 25 UG Housing	10/21/2024	6/14/2025

## STEP 12




Select the applicable checked out item and then "Next"

**Basic Student Information**

PID:  Cell Phone:   
Lived First Name:  UCSD Email:   
Last Name:

**STEP 2: Select Item(s) Being Returned/ Updated**

Record Type	Description	Living Area	Create Date/Time
<input checked="" type="checkbox"/>	Item Check Out	Basketball	Bed Space: SW-0407-1a 12/5/2024 1:24 PM

 CANCEL  BACK 



## STEP 13




Confirm applicable bed space & click "NEXT"

**Basic Student Information**

PID:  Cell Phone:   
Lived First Name:  UCSD Email:   
Last Name:

**STEP 3: Confirm Item(s) Returned Pertain to this space**

 CANCEL  BACK 

## STEP 14

Select Item Return Status & Click "NEXT"

Options Include the following:

- Returned Item(s) On Time WITHOUT Damage: Record is closed and moved to the housing location's "Archived Item Check Out List"

- Returned Item(s) On Time WITH Damage: Record is moved to the housing location's Pending Charge Assessment list for staff to review.
- Returned Item(s) Late WITHOUT Damage: Record is moved to the housing location's Pending Charge Assessment list for staff to review for potential late return charge.
- Returned Item(s) Late WITH Damage: Record is moved to the housing location's Pending Charge Assessment list for staff to review.
- Returned Item(s) - Lock Out Limit Review: If the person checking the item back in believes the the student should be reviewed for a potential charge related to the number of lock outs they have had based on summary above. Record is moved to the housing location's Pending Charge Assessment list for staff to review.
- Lost Item(s): Record is moved to the housing location's Pending Charge Assessment list for staff to review lost item(s) charge.

Basic Student Information

PID:

Cell Phone:

Lived First Name:

UCSD Email:

Last Name:

Lock Out/Equipment/Mid-Year Damage Summary

Record Type	Living Area	Item Check Out Type	Description	Item Return Status	Charge Assessment Outcome	Mid-Year Damage Charge Status
Item Check Out	Bed Space: SW-0407-1a	Equipment Check Out	Basketball			
Mid-Year Damage	Bed Space: SW-0407-1a		Key & Custodial Charge			Pending Charge

Current Item in Process:

Item Check Out Type: Equipment Check Out

Checked Out Item: Basketball

Item Check Out Date: 12/5/2024 1:24 PM

Return Item(s) By: 12/5/2024 11:00 PM

STEP 4: Select Return Status

Select the item return status that best fits the situation:

Item Return Status:

Returned Item(s)-On Time WITH

CANCEL

NEXT



## STEP 15

### Enter who received the item from the student & click "FINISH"

The student will receive a confirmation email related to the return and if there will be any additional review related to a charge.

**Basic Student Information**

PID:

Cell Phone:

Lived First Name:

UCSD Email:


Last Name:


**Current Item in Process:**  
**Item Check Out Type:** Equipment Check Out  
**Checked Out Item:** Basketball  
**Item Check Out Date:** 12/5/2024 1:24 PM  
**Return Item(s) By:** 12/5/2024 11:00 PM  
**Return Status:** Returned Item(s)-On Time WITHOUT Damage


**STEP 5: Staff Member Receiving Returned Item(s)**

**Name of Staff Receiving Returned Item(s):**

**STEP 6: Click "FINISH" to Save the Entered Information**

 CANCEL

 BACK

 **FINISH**

## # Charge Assessment Review

8 Steps

If an item is returned late, denoted to have damage or is lost, the record will be moved to the housing location's "Pending Charge Assessment Review" list for a staff member to make a final decision as to charge or not charge the student.

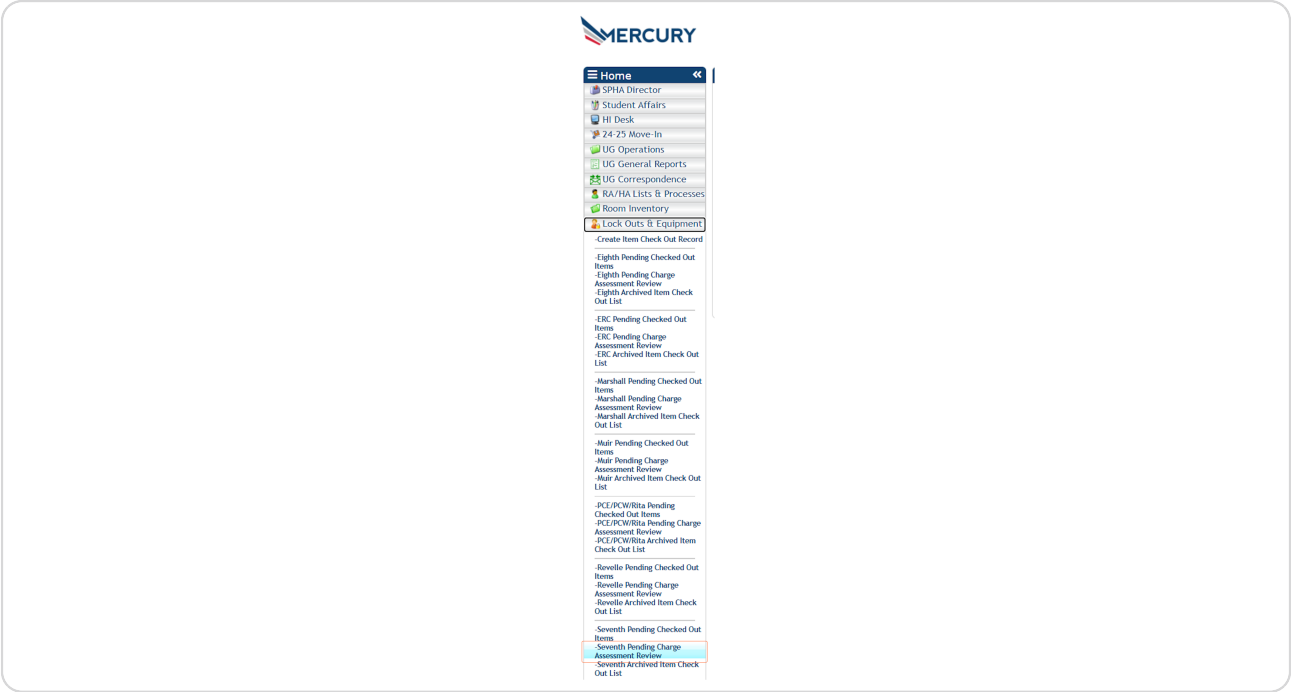
## STEP 16

### Click on Lock Outs & Equipment



STEP 17

Click on applicable housing locations "Pending Charge Assessment Review" list



## STEP 18

### Click on "Show Me List"

**Home**

- SPHA Director
- Student Affairs
- HI Desk
- 24-25 Move-In
- UG Operations
- UG General Reports
- UG Correspondence
- RA/HA Lists & Processes
- Room Inventory
- Lock Outs & Equipment

**Seventh Charge Assessment Review**

**Search Options**

PID  Item Check Out Type

Lived First Name  Description

Last Name  Item Return Status

Living Area  On Date

Advanced Selection

Sort by

[Show Me List](#) [Reset List](#)

## STEP 19

### Off of the desired record, follow the "I want to..." and click on "Review for Potential Charge"

**Seventh Charge Assessment Review**

**Search Options**

PID  Item Check Out Type

Lived First Name  Description

Last Name  Item Return Status

Living Area  On Date

Advanced Selection

Sort by

[Show Me List](#) [Reset List](#)

Item(s) Checked Out By	Create Date/Time	Item(s) Checked In By	Item(s) Check In Date/Time	Item Return Status
Bay Nam Item(s) Check Out Status	PID	Lived First Name Last Name	Cell Phone	UCSD Email
AB000000 Pending Charge Assessment	A05968963	Heggersd (Test)	Walckd	858-534-4770 mwalck@ucsd.edu
Seventh College SW-0407-1a	Equipment Check Out	Basketball	Hickey House	12/5/2024 1:24 PM
Daddy Duck	12/5/2024 1:25 PM	Returned Item(s)	Late With Dispute	Review for Potential Charge

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## STEP 20

**Select the applicable bedspace and click "NEXT"**

**Basic Student Information**

PID:

Cell Phone:



Lived First Name:

UCSD Email:

Last Name:

**STEP 1: Select the Booking that Pertains to Checked Out Item(s)**

	Bed Space	Term	Move In	Move Out
<input checked="" type="checkbox"/>	SW-0407-1a	24 25 UG Housing	10/21/2024	6/14/2025

 CANCEL  NEXT

## STEP 21

### Select the Charge Assessment Outcome and click "NEXT"

Using the information on the screen, select from the options below:

- No Charge: Record is closed and the student receives a confirmation email that no charge will be assessed at this time.
- Assess Damage Charge ONLY: Only plan to assess a charge to the student based on damage to an item or the item was lost.
- Assess Late Return Charge ONLY: Only plan to assess a charge to the student based on fact that the item was returned late.
- Assess Damage & Late Return Charges: Plan to assess a charge to the student based on damage to the item and that it was returned late.
- Assess Lock Out Limit Charge: Plan to assess a charge to the student based on reaching the number of allowable lock out prior to receiving a charge.

Person: Walick4, B

Basic Student Information

PID:

Cell Phone:

Lived First Name: Meggers4 (Test)

UCSD Email:

Last Name: Walick4

Item Check Out History:

Record Type	Living Area	Item Check Out Type	Description	Item Return Status	Charge Assessment Outcome	Mid-Year Damage Charge Status
Item Check Out	Bed Space: SW-0407-1a	Equipment Check Out	Basketball	Returned Item(s)-Late WITH Damage		
Mid-Year Damage	Bed Space: SW-0407-1a		Key & Custodial Charge			Pending Charge

Current Item in Process:

Item Check Out Type: Equipment Check Out

Checked Out Item: Basketball

Item Check Out Date: 12/5/2024 1:24 PM

Return Item(s) By: 12/5/2024 11:00 PM

Return Status: Returned Item(s)-Late WITH Damage

STEP 4: Select Item(s) Charge Status

Return Status: Returned Item(s)-Late WITH Damage

Notes entered by the staff member at the time the item was returned or denoted as lost:

Item(s) Denoted Lost/Late/Damaged By:

Select damage charge outcome based on this information:  

Assess Damage & Late Return Charge

CANCEL

NEXT

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## STEP 22

Based on the types of charges to be assessed in the previous step, fill in the requested information related to the charges, Enter who is entering the charge, and click "FINISH"

The student will receive a confirmation email related to the assessed charges. The charge notes are included in the students confirmation email.

Equipment Damage Charge Notes:  
As a result of popping the basketball \*

Late Return Charge Amount:  
\$10 \*

Late Return Charge Notes:  
As a result of returning the ball the day after it was supposed to be returned \*

**STEP 6: Staff Member Entering Charge Information**

Name of Staff Member Entering Charge(s):  
Goofy \*

**STEP 7: Click "FINISH" Below to Send Mid-Year Damage Charge to Housing A**

CANCEL

## STEP 23

By submitting this form with a denoted charge, the record will populate on the "Pending Damage Charge List" for the Housing Administrative team to apply to the student account.

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