V. SECTION V PATRON RECORD AND REGISTRATION

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A. INFORMATION ABOUT PATRON RECORDS

Patron record basics

- There is one patron database that is shared by all LINKcat libraries (400,000+ patron records).
- Library staff can create or modify records for patrons living inside of and outside of their community. Library staff can also update/modify the patron record of any patron in the database.
- Patrons may use their library card at any LINKcat library.
- To avoid creating duplicate records, library staff MUST remember to search using the patron's full name, variations on their name and then doing a truncated name search (to get a list to review) before adding a new record. Use the Advanced Patron Search functionality to search multiple fields at the same time (i.e. surname and birthdate).
- Use the patron's full name when entering the record: lastname, firstname provides the most accurate results.
- It is essential that all the data in patron records is entered correctly:
 - Confirm all entries for correct spelling, street numbers and phone numbers before saving the record.
 - Read Part C for the recommended Data Entry Format for patron records.
- Many of the fields in patron records are used for reporting and statistical information.
- The barcode is not the main key to the patron record; it can be changed, like the address or telephone number. The patron's borrower number is the key since it never changes.
- Library barcodes are replaceable, and the system saves the previous number for reference.
- Any time library staff create or modify a record in the patron database, follow these basic procedures.
 - Whenever you issue a new card or replace a lost card, the patron must furnish valid forms of ID. If it is not available, do not proceed with registration and do not make a lost card active again. Request that the patron return with proper ID in order to get a card. A list of valid forms of ID is in Part D of this Section.
 - If you are just confirming a change of address or renewing an expired or soon to be expired card, you may or may not require photo ID, *according to your local library's policy*.
 - If valid ID is available to verify identity and address, have the patron complete the SCLS patron registration form.
 - Check the Bibliovation patron database for a prior entry. If there is a prior record, update that record rather than create a new one.
 - Proceed with patron registration following the procedures detailed in Parts D and E of this section.
 - After completing the registration process, verify that the record has been successfully

entered and exists in the database.

- Confirm that the patron understands that they are responsible for all items checked out to and possible charges incurred by this library card.
- Hand your patron their library card and have them sign it.
- Place of residence There are several registration situations, depending on where the patron resides (See Part E of this Section).
 - B. HOW TO SEARCH FOR PATRON RECORDS TO AVOID DUPLICATION OF RECORDS

BEFORE creating a new record, use one or more of the patron searching features to search for the patron to prevent duplicate records

To get to the main Patrons page, click on the Patrons link on the top of the screen. The main Patrons page lists three patron searching options:

B™	Enter patron card numb	Search the Catalog	y: Surname	Check In
Search/Browse Patrons		Search the cotalog	checkout	checkin
Add New Patron	Borrower Cart ⊕ New ▼			
	Browse by last name: <u>A B C D E F G H I J K L M</u>	NOPQRSIUVWXYZ		
	Advanced Patron Search Show Advanced Search Options			

1. Search Patrons feature in the page banner aka Banner Search

The banner search box sort order defaults to Surname, with the options to sort by Cardnumber. First and last names can be entered in any order and names can be truncated.

Example of searching in the banner search field: Entering tim johns or johns tim will get the same search results and will include all trailing characters after the m in tim and the s in johns (so Tim, Timothy, Timoteo, Johnson, Johnston, etc. would be included in your results)

2. Browse by last name

This feature allows you to browse a list of patrons whose last names begin with the same letter. You may use this feature to double check for mildly misspelled names or a variation in the spelling of a surname

3. Advanced Patron Search

Almost every field in a patron record is searchable using this feature. You can search one data field or multiple fields at the same time. Use this feature to search for unique identifiers in the patron record (like birthdate, email, phone number, borrower number, or address).

	Patron Identity
	Search Patrons
	Borrower number:
	Borrower Cardnumber:
	Sumame:
	Firstname:
	Patron Branch: All Branches
	Category: All Categories
	DL Login:
	Sort Field 1:
	Registration
	Before Date:
	Expiry
	Date of Birth
	Refere Date:
	Main Address
	Address:
	City, State:
	Zip Code:
	Address:
	City, State:
	Contact
	Email (Home):
	Email (Work): No Value
	Phone: ON Value
1	Notes
	DL Note:
	Circulation Note:
	Flags
	Debarred:
	Gone, No Address:
	Lost Card:
-	Dennis Determine Add Dennike to a Link (A New Link New edge)
l	Search Patrons Aud Results to a LIST A New LIST Named V

You can use truncation to find all the patrons that start with that specific character string in that particular field.

For example:

If you are trying to find all the patron records that have the last name of Olsen or Olson or Olsonn that live in the City of Stoughton, you could enter the following in each of the needed fields:

In the Patron Identity area Surname = Ols In the Main Address area City, State = STOUGHTON WI

Using truncation (only typing the first part of the name) in the Surname field will yield results that **start with that character string**.

Patron Identity:

- Borrower number: Bibliovation borrower number, never changes.
- Borrower Cardnumber: patron barcode; can change when cards become lost and are replaced.
- Surname: patron last name or Organization name
- Firstname: patron first name
- Patron Branch: library in patron's record; also default pickup location
- Category: patron category: Adult, Juvenile, Organization, etc.
- DL login: patron barcode
- Sort Field 1: patron's residential code (aka PSTAT)
- Sort Field 2: occasionally used for special projects, otherwise do not use

The next three search fields can be used in conjunction to narrow down a search for a specific date:

Registration:

- After Date: select patrons who registered after a particular date
- Before date: select patrons who registered before a particular date
- When searching for patrons who registered at a specific library on a particular date, you can set parameters in fields to narrow your search. For examples, to find a patron who registered at BAR on 4/1/2011, set the following
 - Patron Branch = BAR,
 - Registration After Date = "03/31/2011 and
 - Registration before date = "04/01/2011"
- You will extract a list of patrons with a Home library of BAR and a registration date of 04/01/2011.

Expiry:

- After Date: select patrons whose records expired or will expire after a particular date
- Before date: select patrons whose records expired or will expire before a particular date

Date of Birth: use the mm/dd/yyyy format.

- After Date: select patrons with a birthdate after a particular date.
- Before date: select patrons with a birthdate before a particular date
- When searching for a specific day, enter the same date in both fields. Example: After Date: 03/14/1960; Before Date: 03/14/1960 you will get a list of patrons with that birthdate.

1. ENTRY FORMAT FOR PATRON RECORDS

In order to simplify data entry and to facilitate data extraction, please use these guidelines and abbreviations when you are entering patron records:

- 1. Use all CAPITAL LETTERS when entering the patron name and address information.
- 2. Do not use any punctuation in the patron name and address fields
- 3. In the First name field: enter first name as it appears on the library card application (under "Name:"), AND patron's full middle name or initial if shown on ID or provided on application.
- 4. In the Surname (Last name) field: If the patron has a name suffix (Jr., Sr., III), enter the suffix after the last name in the Surname field. Example: HOWELL III (no period after the suffix and no comma after the last name).
 - a. For names with apostrophes—do not use the apostrophe and do not leave a space. Example: OMALLEY
 - b. For names that have St or Saint –do not use the period but do leave a space between the ST and the rest of the name (treat it as two last names). Example: ST ARNOLD
 - c. For names that may appear to have spaces between parts of the name---do not leave spaces in the database. Example: Van Der Wall becomes VANDERWAL in our database. (This will make it easier for the truncated holds slips as well)
 - d. For double last names—do not use a hyphen but do leave a space between the two names. Example: HILLS MEYER
- 5. In the **Other Name** field: **(use only if patron filled out the Name on Photo ID section of application and it differs from Surname and/or First name on the app)**: enter the full name as it appears on the photo ID in the following format: first name, middle name or initial, last name.
- 6. If only a cell phone number is provided—put it in the **Phone (primary**) field (this way it appears on the left side of the cko screen).
- Use the Common Postal Abbreviations listed below for street and directional designations. A full list of all USPS road abbreviations is also posted on our CODES webpage. incorrect format: 1234 SOUTH GRAND CANYON DRIVE correct format: 1234 S GRAND CANYON DR

Here are two lists of common road abbreviations. For the entire list of USPS road abbreviations refer to the document "<u>Highway designation and road abbreviations</u>" posted on the ILS Support/Codes web page. Based on the US Postal Service and the US Census Bureau highway designations, the following are recommended for data entry in our database:

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AVE	Avenue	MTN	Mountain	WAY	Way
BLV	Boulevard	PKWY	Parkway	RM	Room
D					
CTR	Center	PL	Place	STE	Suite
CIR	Circle	PLZ	Plaza	Ν	North
СТ	Court	RDG	Ridge	E	East
DR	Driveway	RD	Road	S	South
EXPY	Expressway	SQ	Square	W	West
HTS	Heights	ST	Street	NE	Northeast
HWY	Highway	STN	Station	NW	Northwest
IS	Island	TER	Terrace	SE	Southeast
JCT	Junction	TRL	Trail	SW	Southwest
LK	Lake	ТРКЕ	Turnpike		
LN	Lane	VLY	Valley		

HIGHWAY DESIGNATIONS

COUNTY RD

HWY

COUNTY HWY

STATE HWY

US HIGHWAY

Lettered highways are County highways or County roads. Numbered highways are US highways or State highways.

8. Use the # symbol to indicate the apartment, suite or trailer number. incorrect format: 555 RIMROCK ROAD Apt. 15

correct format: 555 RIMROCK RD **# 15** USPS states that if you use the number symbol you should place a space between the symbol and the number.

9. Enter the number of the apartment on the same line as the street address if possible. incorrect format: 1414 MOCKINGBIRD LANE APT. 13

correct format: 1414 MOCKINGBIRD LN # 13

10. You can choose the City, State from the pull-down menu or type it in (do not use a comma between the city and state). You may have to re-enter the ZIP code, if the city has multiple ZIP codes.

C. SCLS GUIDELINES FOR REGISTERING PATRONS

SCLS has developed guidelines for patron registration procedures, to ensure consistency within the System, within LINKcat libraries and within non-LINKcat libraries. These guidelines will assist libraries in dealing with registration of patrons other than those who reside within the taxing jurisdiction of their

library. In January 1999, PLAC (now the SCLS Administrative Council) adopted the following guidelines for registering patrons from other libraries. All SCLS libraries should follow these guidelines when registering patrons.

These guidelines have been developed in an effort to standardize library card registration procedures throughout the system. They are intended to facilitate the acceptance of library card registration forms from one another's patrons. As such, they should be regarded as minimum standards which don't supersede stricter local standards. A common registration form, available in English and Spanish, is provided for use in all libraries.

DEFINITIONS:

SCLS – South Central Library System

LINKcat libraries – term used to describe the group of libraries sharing the Bibliovation ILS. LINKcat is the public name of the shared Bibliovation software and Public Access Catalog (PAC)/Discovery Layer. Non-LINKcat libraries – term to describe libraries not part of the Bibliovation ILS database. ILS – Integrated Library System – software used by libraries for circulation, cataloging, online catalog, serials and acquisitions.

The following guidelines should be considered basic precepts for SCLS library card registration:

- a. Libraries should provide patrons with cards rather than keeping cards on file at the library.
- b. SCLS library patrons should have only one library card per ILS.
- c. Non-SCLS library patrons can be registered according to these guidelines.
- d. LINKcat libraries should follow LINKcat procedures when registering patrons in the Bibliovation database. For LINKcat libraries, a library of residence is defined as the library in the municipality in which the patron has a legal place of residence.
- Procedures for accepting adult registrations (18 and over):
 - If the patron wants to check out materials at the time of registration, a photo ID and proof of address must be furnished.
 - If the patron does not have proof of address, they may not be allowed to check out materials at the time of registration. The library card may be mailed to the address given by the patron, based on local library policy. This will serve as verification of the address.

Below are listed several forms of acceptable identification, varying in their validity for verifying name and/or address. Remember: A Photo ID of some sort is required.

Type of ID	Valid for Name	Valid for Address
current Driver's license	yes	yes
current State ID card	yes	yes
current Military ID with photo	yes	yes
current Student ID with photo	yes	no

Acceptable forms of ID for verifying name and/or address:

current Permanent Resident card	yes	yes
current Employer ID with photo	yes	no
current Credit card with photo	yes	no
Hunting or fishing license	no	yes
Checkbook	no	yes
Utility bill	no	yes
Mail at current address;	no	yes
postmarked within 30 days.		
Current lease or mortgage	no	yes

- Procedures for accepting juvenile and young adult registrations:
 - If an applicant is considered a juvenile per local library policy, a parent or legal guardian identification and signature may be required.
 - LINKcat policy is one library card per patron, regardless of age.
 - A library staff member should search their patron database for the patron's name (including previous names), using a variety of spellings, to avoid adding a duplicate record. Ask if they have ever previously had a library card.
- After the patron has completed the registration form and is still at the registration desk, library staff should confirm that all required data (name, address, birthdate) has been filled in and that the data matches the information on the photo ID. Verify their email address (if submitted) and assign them a PIN if they do not have a 4 digit numeric number they want to use. *(Currently the birthdate is not a required field)
- A registration form for an individual should be sent to the patron's library of residence, which is based on their legal place of residence and/or their PSTAT. A registration form for an organization (teacher, school, business) should be sent to the library in the municipality in which the organization is located.
 - When the registration form is received at the library of residence, staff should re-search the patron database to confirm that the new record is not a duplicate.
 - \circ $\;$ Staff should confirm that the correct PSTAT has been entered in the record.
 - The PSTAT for an organizational record, like a card for a teacher at a school, should be based on the municipality in which the organization is located.
- If a patron reports an address or name change, have the patron complete a new registration form, noting the former name and/or address and barcode number on the registration form. This information may then be entered immediately into the Bibliovation database. The form should be marked "CHANGE" and sent to the patron's library of residence.
- If a patron reports a lost card, mark their patron record to reflect this, and a new registration form should be completed. A replacement cost may be charged and collected at that time. The form should be marked "LOST CARD" and sent to the patron's library of residence. Bibliovation libraries can mark the barcode "Lost" in the patron database. The CSS is still discussing whether this procedure is necessary.

Part D revised by PLAC Dec. 2009 CSC revised Nov. 2012 AC approved Jan. 2013 CSS revised mm/yyy AC approved mm/yyy

D. SUMMARY OF VARIOUS REGISTRATION SCENARIOS

For ALL patron registrations, be sure to follow the general SCLS guidelines listed above. These guidelines apply to registration at all SCLS ILS libraries regardless of LINKcat membership. You should also follow the basic registration steps listed in Part A: Information about Patron Records.

Patrons who come to your library to register for a library card will fall into different categories depending on their place of residence. Listed below are the various registration situations you may encounter, along with a procedural summary for each. Remember that a library's "district" includes all municipal divisions that pay taxes to support that library. Patrons who reside in that district are considered "resident" patrons of the library; all others are considered "non-residents." In light of the current efforts to determine "resident" and "non-resident" use of a library, please ensure that the PSTAT accurately reflects the patron's legal place of residence.

Here are different patron registration situations and the general procedures to follow for each situation. Refer to earlier portions of the manual for more information on entering data in the patron record.

- 1. Patron resides in your own library's district each LINKcat library should have policies and procedures for handling the registration of patrons who reside in their library district.
 - a. New card Check ID and proof of address, enter information into Bibliovation patron record, and issue patron card.
 - b. Lost card Follow procedure for providing new card, and replace "Lost" barcode (see Part M: Replacing a Patron Barcode).
 - c. Renewal Verify patron information, update patron record if necessary and renew the patron record.
 - d. Patron is not carrying card follow your local policy.
 - e. Patron just moved into your district what to do with their old card?
 - i. If from a LINKcat library, patrons may continue to use their old card if they would like, update patron record as needed. If replacing card, destroy old card.
 - ii. If from a non-LINKcat library, you may, if the patron no longer wants the card, send it back to the patron's original Home library so they may update their records.
- Patron resides in the district of another SCLS ILS library. Refer to your list of SCLS libraries. Remember that any patron residing anywhere in Adams County, Portage County or in rural areas of Dane County, should be regarded as residing within the district of a LINKcat library. For patrons residing in rural areas of other SCLS counties, see 3 and 4 below.
 - a. New card Check ID and proof of address, enter in Bibliovation, issue library card and send registration form to patron's Home" library for their records.

b. Lost card - Follow procedure for providing new card, and replace "Lost" barcode (see ILS Circulation Manual ver. 7.02 Patron Record and Registration rev. 6/23 Part M: Replacing a Patron Barcode).

- c. Renewal Verify patron information, update patron record if necessary and renew the patron record.
- d. Moved Depending on where they moved to, check ID and proof of address, and act accordingly.
- e. Patron is not carrying card follow your local policy.
- 3. Patron resides in the district of an SCLS non-LINKcat library. Refer to the <u>SCLS Member Library</u> <u>Directory</u> for up-to-date information.
 - a. Has card from their home library, but without a LINKcat barcode Check photo ID and proof of address, enter in Bibliovation, place barcode on card they are carrying.
 - b. Patron does not have their card with them Check ID and proof of address, enter in Bibliovation, and issue the patron a library card.
 - c. Renewal Verify patron information, update patron record if necessary and renew the patron record.
- 4. Patron resides in SCLS but does not reside in a district that supports a library. This area includes rural Columbia, Green, Sauk, and Wood. Patrons in this category may be treated in several ways, depending on their county.
 - a. If the patron is from your county and you have a supply of county cards you can follow the rules for a new card (1 a) and either issue your library's card or a county card.
 - b. If patron is not from your county but is from Columbia, Green, or Sauk counties:
 - i. Check ID and proof of address, and enter information in Bibliovation.
 - ii. Issue your library card or county card, if you have one.
 - iii. Send the completed patron application to the county resource library (Columbia Co Portage PL; Green Co Monroe PL; Sauk Co Baraboo PL) for their records.
 - c. If the patron is not from your county but is from Wood County: Wood County does not issue a county card, but MCM acts as county resource library.
 - i. Check ID and proof of address, and enter information in Bibliovation.
 - ii. Issue a library card from your library.
 - iii. Send the completed patron application to Wisconsin Rapids PL for their records.
- 5. Patron resides in a WI library system that has reciprocal borrowing privileges with SCLS. Reciprocal borrowing privileges means that SCLS libraries agree to honor library cards from other library systems and these other systems will honor our patron cards. [This includes all library systems in Wisconsin other than Milwaukee County.]
 - a. If the patron has their card from their home library/System.
 - i. Have the patron fill out a patron registration form.
 - ii. Require photo ID.
 - iii. Require proof of address.
 - iv. After entering the patron information in Bibliovation, place the LINKcat barcode on their Home library/System card or issue them a library card from your library.
 - b. If the patron does not have a home library card with them, the library has several options, including but not limited to the following:
 - i. Do not allow registration or checkout.
 - ii. Allow the patron to register and provide them with a card from your library.
 - iii. Allow the patron to register and purchase a Deposit card.

- iv. Allow the patron to register and purchase a Membership.
- 6. Patron resides in Milwaukee County Federated Library System, a system that has no reciprocal borrowing privileges with SCLS. You are not required to lend any materials to these patrons or to take their registration; whether or not you choose to register these patrons depends on your local library policy. If your library allows registration of patrons living in Milwaukee County, follow these steps:
 - a. If the patron has their card from their home library/System.
 - i. Have the patron fill out a patron registration form.
 - ii. Require photo ID.
 - iii. Require proof of address.
 - iv. After entering the patron information in Bibliovation, place the LINKcat barcode on their Home library/System card.
 - b. If the patron does not have a home library card with them, the library has several options, including but not limited to the following:
 - i. Do not allow registration or checkout.
 - ii. Allow the patron to register and provide them with a card from your library.
 - iii. Allow the patron to register and purchase a Deposit card.
 - iv. Allow the patron to register and purchase a Membership.
- 7. Patron resides in another state. You are not required to lend any materials to these patrons or to take their registration; whether or not you choose to register these patrons depends on your local library policy. If your library allows registration of patrons living out of state, follow these steps:
 - a. If the patron has their card from their home library/System:
 - i. Have patron fill out patron registration form.
 - ii. Require photo ID.
 - iii. Require proof of address.
 - iv. After entering the patron information in Bibliovation, place the barcode on their Home library/System card.
 - b. If the patron does not have a home library card with them, the library has several options, including but not limited to the following:
 - i. Do not allow registration or checkout.
 - ii. Allow the patron to register and provide them with a card from your library.
 - iii. Allow patron to register and purchase a Deposit card.
 - iv. Allow patron to register and purchase a Membership.

E. CREATING A PATRON RECORD

Fields in the patron record

Here is a list and an explanation of all the fields in a Bibliovation patron record in the order found in the New Patron template. Required fields are in red. Different Patron Categories have slightly different templates.

NOTE: the "Add New Patron" link in the left sidebar is now functional, but defaults to the Adult patron form.

From the main Patrons screen, click on the New button and select the patron category for the record you are creating.

Staff <u>H</u> ome <u>C</u> irculation	<u>P</u> atrons <u>S</u> earch More → 🖬 Hide Masthead		SCLS Headquarters
B™	Enter patron card number or partial name	der by: Surname V	
	Search Patrons Search the Catalog	Check Out Check In	
TEST	TEST TEST TEST	TEST TEST	TEST TEST
Search/Browse Patrons			
Add New Patron	Adult Adult Staff Bulk Loan Do not use - Administrative Staff DoNotUse Eine Free Or Show Advanced Search Options	Ζ	

For this example, I have selected "Adult". The "Add New Patron" screen in Bibliovation 7.02 is arranged in a different order than previous versions.

Library Management:

- Category: The Patron Category works in conjunction with the item type to set the Circulation Issuing Rules for each library. See <u>Section X Circulation Codes and settings</u> for more information about these codes and rules.
- Card number [*Required field*]: patron's barcode number
- Library: patrons' preferred pickup location, select name of library from pull-down list.
- Sort 1 [*Required field*]: Patron Statistical Information/PSTAT we use this field to define the patron's legal residence by a code. That code may be the municipality's Census Tract, city District, city Ward or other code. Use the pull-down list to select the correct name of the municipality that the patron lives in.
- Sort 2: Unused at this time.

Patron Identity – use CAPITAL LETTERS when entering patron data.

- Surname [*Required field*]: Enter patron's Last name [NO COMMA].
 - If the patron has a name suffix (Jr, Sr, III), enter the suffix after the last name in the Surname field. Example: HOWELL III (no comma before, no period after the suffix)
- First name [*Required field*]: Enter patron's First name and Middle name or Middle initial.
 - \circ If the patron has a "daily" name, that they prefer to use that is different from their

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identification, place their name in this field.

- If entering only the Middle initial, place a period after it.
- Birth date: use the Calendar widget or enter the date as YYYY-MM-DD or DD/MM/YYYY. The form will only accept these date formats. This is not a Required field but is very useful as a unique identifier for patrons.
- Initials: Enter a Middle Initial for use in Hold Found slips.
- Other name: If the patron has a name different from their identification, place the name in the "Surname" and/or the "Firstname" fields and the full name from their Photo ID in the "Other name" field.
- [Gender]: Female, Male or N/A: NOT REQUIRED. Leave as N/A unless your local library policy requires a gender. Use N/A for other libraries, businesses, organizations, or institutions.

Guarantor information – these fields will display for all patron records as part of the Patron Group functionality. You do not need to fill in this section when creating a new patron unless you want to link a Juvenile record to an Adult record.

- Surname
- First name
- Relationship

Main Address: this is the patron's MAILING address

- Address [*Required field*]: Primary mailing address. Enter the street number and name in this field, including apartment or building numbers.
- City, State: manually enter the city and state in this field OR choose the City/State combination from the pull-down menu on the right. There may be multiple city listings in the pull-down menu you will have to confirm the correct zip code.
 - IF you do not select a City from the pull-down menu, enter the data as CITY ST (e.g. BARABOO WI). Do NOT place a comma between the city and state.
- Zip/Postal Code
- Country: DO NOT USE

Contact: contact information; how to contact the patron.

- Phone (primary): enter using the xxx-xxx format for phone hold notices. Note: For all phone number fields, you must use a 10-digit phone number and include the area code.
- Phone (secondary): enter using the xxx-xxx format.
- Phone (cell): enter using the xxx-xxx format. Use this field for a cell number that is NOT the primary phone number.
- SMS alert (cell): not used for delivering text messages.
- Email (primary): enter using lowercase letters. Staff can enter multiple email addresses, separated by a comma or semicolon (;) and the patron will receive the notices at both addresses.
- Email (secondary): enter using lower case
- Fax: enter using the xxx-xxx format

Alternate Address: Use for the patron's RESIDENTIAL address when the mailing address is a P.O. Box. These fields are also used by the Juvenile patron template and the Organization patron template to display Guarantor information (if the accounts are linked) or alternate contact information.

Address

- Address 2
- City, State
- Zip/Postal code
- Country: DO NOT USE
- Phone
- Email
- Contact note

Alternate Contact: use these fields to provide information about an Alternate Contact for the patron.

- Surname
- First name
- Address
- Address 2
- City, State
- Zip/Postal code
- Country: DO NOT USE
- Phone

Library set-up

- Registration date: date patron was registered automatically populated when you create a record.
- Expiry Date: automatically populated when the patron record is saved based on the Patron Category selected. Can be modified.
- Discovery Layer Note: free-text note field that is displayed in the patron's Dashboard in the Discovery Layer and in the patron's Details screen in the Staff View.
- Circulation Note: free-text note field that is wholly displayed in the patron's Check Out screen and partially displayed in the patron's Details screen in the staff view.

DL (Discovery Layer) login

- DL login [*Required field*]: ALWAYS enter the patron's barcode number here. If you do not enter the barcode number here, the patron's FIRSTNAME.LASTNAME will be auto filled.
- Password [*Required field*]: MUST be a numeric password, between 4 and 16 digits in length. These parameters are required in order to work with the Talking Tech (telephone messaging) software and other third-party vendors.

Patron Messaging Preferences – See Part F

Patron Account Flags – These do not appear in the patron record until after the new record is Saved. If you make changes to these settings, always click "Save" after making the changes.

- Debarred check the Yes radio button to completely block the patron from checking out
 materials and placing holds until they resolve the issue that caused them to be Debarred. The
 message "Patron is debarred" displays as a Block on the patron's Check Out screen. Use the
 Restriction Reason Message to define the restriction reason for other library staff. Click the "Lift
 restriction" link on the Check Out screen or select the "No" radio button in the Details screen
 (and Save) to turn it off.
- Exclude from Collection check the "Yes" radio button to prevent this patron record from being

submitted to the UMS Collection agency. Click the "No" radio button (and Save) to turn it off.

- Gone no Address Check the "Yes" radio button to have the message "Patron address is in doubt" display as an Alert on the patron's Check Out screen. You must manually click the "No" radio button and save the change to turn it off.
- Lost Card check the "Yes" radio button to indicate that this cardumber has been reported as Lost. Patron Block will display on the patron's check out screen stating "Patron's card is marked Lost". If and when this cardnumber is found or replaced, you MUST manually check the "No" radio button.

F. PATRON MESSAGING PREFERENCES

ONLY select notices listed in the Circulation/Borrowing section. The notices in the other sections have not been tested. We do not have a way to hide these settings.

Precise information about how Messages/Notices are generated and delivered is explained in more detail in <u>Section XIII Notices</u>, <u>Messaging preferences and Messaging Queue</u>.

In order to enable a previously unselected notice option, *you must click the checkbox in the "Override role prefs" column* and then select the delivery method, Email, TTtext or TTvoice. See below for specific options.

What notices we (can) provide and the delivery method(s):

- Advance Notice: Email only. If checked, an automatic email notice will be generated by the system reminding the patron about items due; generated **two** days prior to the due date. **DO NOT USE** if the patron has selected the (1 day) Item DUE notice option.
 - Digest: **ALWAYS** choose this option, *in addition to the notice type*, to have more than one notification appear in each email.
- *Hold Canceled*: Email or print only. If checked, notice that a hold for the patron was canceled will be generated.
- *Hold Filled*: Print is the default. If checked, email, phone, and text (Email, TTvoice, TTtext) notice(s) will be generated informing the patron that a hold or holds are available for pickup. Notice is generated when the item/items are checked in at the pickup location.
 - Digest: ONLY select for Email notices. Phone and text notices are "digested" after being sent to the Talking Tech server.
- *Item Check-in*: TYPICALLY A STAFF NOTICE; uses default formatting. Email only. If checked, a patron can receive email notification of the check in of their returned items.
- *Item Checkout*: TYPICALLY A STAFF NOTICE; uses default formatting. Email only. If checked, patron will receive email notification of items checked out to their record.
- *Item DUE*: Email only. If checked an automatic email notice is generated and sent **one day** prior to the due date reminding the patron about items due. **DO NOT USE** if patron has selected the (2 day) Advance Notice option. This notice does not include title information.
- *Item Lost*: Email only. If checked, patron will receive an email message.
- *Item Overdue* Email or print only. Not an option for phone or text.
- Item Recall Notice WE DO NOT USE
- Outstanding Fines Not enabled for use. This is separate from the script that runs our Billing notices.

After making all the additions and changes to this record, Make Sure You scroll down to the bottom of the screen **and click the Save button**.

- G. COPYING A PATRON RECORD
- Copy patron record
 - Start from either a Patron Checkout or Details screen.
 - On the work tool bar, click on the New button and select the "Copy patron" option.
 - The system provides a template based on the record you are copying (Adult to Adult, Adult Staff to Adult Staff, etc.).
 - Fill in the form for the patron. Notice that some fields are pre-populated with information.
 - \circ $\;$ When done, scroll down to the bottom of the screen and click the Save button.

H. ADDING A CHILD TO A PATRON RECORD

- Add Child
 - Start from either a Patron Checkout or Details screen.
 - On the work tool bar, click on the New button and select the "Child account" option.
 7.02 KNOWN PROBLEM: The system is not defaulting to a juvenile template from this button. You will need to make certain you select a Juvenile Patron Category until this is fixed.
 - Fill in the form for the patron. Notice that some fields are pre-populated with information.
 - When done, scroll down to the bottom of the screen and click the Save button.
 - Notice that the Guarantee (child) has a digital connection to the Guarantor (guardian) listed. You can access the other record by clicking on the link.

I. ADDING A GUARANTOR TO A JUVENILE RECORD

- Attach a Guarantor (this action will also start a Patron Group in the Guarantor's record. See Part R in this Section for more details and instructions.)
 - Setting up a Guarantor/Guarantee relationship for two existing records can ONLY BE SET from the JUVENILE RECORD, unless you use the Patron Group functionality mentioned above.
 - If you need to attach an already existing Adult record to an already existing Juvenile record as a Guarantor (or Guardian), follow these steps:
 - Pull up the Juvenile record.
 - Click the main Edit button
 - In the Guarantor Information section enter the Surname and First name of the existing patron record that you want to make the Guarantor/Guardian of this juvenile record and click the "Set to Patron" button.
 - You will get a pop-up window labeled "Search for Guarantor". Enter the surname, first name again in the pop-up box and click Search. If more than one result is extracted choose the correct record.
 - Click the Select button to choose the record.
 - The Adult name and borrower number (with hyperlink) will display in the Juvenile record. "Guardian" is the only option available in the Relationship field.
 - CLICK THE SAVE BUTTON AT THE BOTTOM OF THE RECORD. This change will not be saved otherwise.

- The Juvenile name (with hyperlink) will display in the Adult's record in the "Guarantees" field and in the Patron Group of the Adult's record.
- The Patron Group link in the Juvenile's record will state that the "Patron is a dependent of patron account [Guarantor]".

J. EDITING A PATRON RECORD

Patron Records can be edited from the patron's Check Out or Details screens. Knowledge of basic registration procedures is required.

- 1. Access the patron record to be edited
- 2. Either click on the Edit button in the work tool bar or click the edit button below each section of the patron record (the latter can only be done in the Details screen).
- 3. Enter the changes directly into the fields to be edited.
- 4. When the changes are complete, scroll down to the bottom of the screen and click the Save button.

K. RENEWING AN EXPIRED OR SOON TO BE EXPIRED PATRON RECORD

If the patron's record has already expired, this block will display on their Check Out screen:

Patron is blocked. Please resolve the following conditions: Patron's card expired on 05/27/2019. <u>Renew</u> or <u>Edit Details</u>

- Review the patron record.
- To renew this record without modifying the patron record, click the Renew link.
- If modifying the patron record, click the Edit Details link and update information before renewing the record. You can manually change the expiration date if you are editing the patron record, or save the record and click the Renew link from the Check Out screen.
- To allow a one-time checkout based on your library policy, click the Edit Details link and change the Expiration date in the patron record to tomorrow. Scroll down to the bottom of the screen and click the Save button.

If a patron's record has not yet expired but is within 30 days of expiring, you will see this Alert on the Check Out screen.



Follow the same procedures listed above to renew this record.

NOTE: As of January 2017, SCLS is using MailChimp to send email notification (only) to patrons with a record Expiry Date of the next month (e.g., March email to patrons with April expiration dates).

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L. **REPLACING A PATRON BARCODE**

A new barcode can only be assigned in the patron's Detail screen. Assign a new barcode when the existing active barcode has been reported lost or a patron's card is damaged beyond use. Bibliovation only allows one (1) active barcode/card number per patron record.

- 1. Call up the patron's Details screen.
- 2. Click the edit button under the Library management section.
- 3. Enter or scan the new barcode number into the Card number field.
- 4. Then scroll down to the DL login field and scan the new barcode number into that field as well.
 - a. NOTE: If the patron has a custom DL login (something other than their barcode), then do not enter the new barcode in this field. The patron will be able to use either their custom login OR their new barcode to log in.
- 5. Scroll down to the bottom of the screen and click the Save button.
- 6. The system will automatically move the "lost" or old card number into the Previous Card numbers section of the Patron Record.

If the patron recovers the old card and prefers it over the new number, follow these steps:

- a. Highlight the card number they want in the Previous Card numbers section.
 - b. Click the Restore button,
 - c. The system will automatically Restore the old number and place the "newer" number into the Previous Card number section.
 - i. **PROBLEM:** if staff repeatedly Restore a specific or "favorite" cardnumber for a patron, the system will retain every restoration in the Previous Cardnumbers field. A cardnumber that has been restored multiple times will produce multiple results in the Patron Search results screen. Search for patron 99999999999999 in the Sandbox to see an example.
 - d. If you Restore the old barcode, you must also change the DL login back to the Restored card number.

Bibliovation retains *all* card numbers moved into the Previous Card number section and provides the date that the number was moved there.

What else needs to be done after changing a patron's barcode?

When you have to change a patron's barcode (Card number field), here's a list of other tasks you may have to do if the patron uses the following library resources:

LINKcat

- Enter the new patron barcode in the patrons' DL login field.
 - **NOTE**: If the patron has a custom DL login (something other than their barcode), 0 then do not enter the new barcode in this field. The patron will be able to use either their custom login OR their new barcode to log in.
- Access: patron will be able use the new barcode to log into LINKcat immediately.

Digital Library

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• If the patron uses the digital library, the previous barcode and new barcode will need to be merged on Overdrive Marketplace. (Current as of 01/30/2023).

M. OTHER PATRON RECORD INFORMATION

Patron account numbers: Each patron has multiple numbers associated with their patron record:

- *Borrower number*. These numbers are automatically assigned by the Bibliovation system. When a new patron record is created, the Bibliovation system assigns an identification number, which then becomes the "key" to that record.
- *Card number*. Otherwise known as patron barcodes, these numbers are entered into the record by staff when a patron record is created or to replace a lost card number. Barcodes can be manually entered or scanned.
 - Warning: Found With Previous Cardnumber if a previous card that was replaced is scanned or entered by staff at Check Out, staff will get an error message that says "No match found. Search Patrons." Click on Search Patrons. The system will produce this search result with this warning message in the Card column:

Res	lesults 1 to 1 of 1 found for '29078006068582'										
Add	Selected Borrowers To Cart										
	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note			
	29078008083282 Warning: Found With Previous Cardnumber	DYNIX, DANGER T CELL #43 Arkham Asylum GOTHAM CITY 00000	Limited Use (A)	SGR	12/01/2020	0/0	0.00		Add to Cart		

This is the **ONLY** warning staff will get that the barcode scanned is not the patron's current, active barcode. If you allow check out, <u>the items will be checked out under the patron's active barcode</u>. Staff at libraries should follow their local library procedure for dealing with situations when patrons present a replaced/lost cardnumber.

- [Repeatedly] Restored cardnumber If library staff repeatedly Restore the same cardnumbers for a patron, a display issue will occur when that cardnumber is scanned. Look at Previous Cardnumbers for Homer J Simpson in the Bibliovation Sandbox for an example (enter 29078020135813 in a "Patron Search" search box and view the results).
- *DL login.* DL login should also be the patron's barcode. When a "lost" barcode is replaced, you will also have to change the DL login. Only staff can modify the DL login field.
- *DL Password*. Staff will enter a password/PIN at the point of patron registration. Patrons may change their own password/PIN by logging into their account in the Discovery Layer. Passwords (PINs) are required for all patron records; it provides greater security for the patron in the event of a lost card. The password/PIN is required for accessing the patron's account in the Discovery Layer, using MyPC and when calling into Harriet, (Talking Tech / telephone notification system).
 - Not all LINKcat libraries require patrons to use their password/PIN when checking out on Self Check units. In order to Call In to Harriet (Talking Tech / telephone notification system), the patron's password/PIN *must* be numeric characters only and must be between 4 and 16 digits in length.

N. BORROWER CART

This option on the main Patron screen allows staff to change the same patron variables for a group of patrons at one time. You can select family members and change the address information for all records at one time. It is very important to pay close attention to what you are doing to prevent mistakes. DO NOT use this feature unless you have practiced in the Sandbox and you are confident that you know exactly what you are doing. As of 7.02, staff will no longer see the "Batch Delete Borrowers" button in the Borrowers Cart.

For example, in the Sandbox, at the main Patron screen, search for patrons with the last name "Dynix". You will see these search results:

R	esults 1 to 9 of 9	9 found for 'dynix'							
Ad	d Selected Borrowe	ers To Cart							
	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
	29078008083282	DYNIX_DANGER_T CELL #43 Arkham Asylum GOTHAM CITY 00000	Limited Use (A)	MAD	07/01/2021	0/3	0.00		Add to Cart
	29078008999982	DYNIX, DARLENE 789 SECOND ST #5 TEST PATRON MADISON 00000	Adult (A)	моо	11/08/2022	0/0	60.22	Testing the fix to the Borrower Cart scroll bar.	Add to Cart
	29078007455580	DYNIX, DEBBIE 505 N ROSA RD TEST PATRON MADISON WI 53705	Juvenile (C)	SGR	12/01/2024	0/0	102.00		Add to Cart
	29078007446951	DYNIX, DEMO PRESSREADER TEST PATRON 505 N ROSA RD MADISON WI 53705	Adult (A)	MCF	04/01/2021	0/0	0.00		Add to Cart
	29078007455648	DYNIX, DIABLO TEST PATRON TEST PATRON BARABOO WI 53559	Adult (A)	BER	04/15/2020	0/0	84.95	NCOA undeliverable 11/2017. Remove this note when address has been updated.	Add to Cart
	29078008083670	DYNIX_DING 400 DYNIX DRIVE TEST PATRON BLACK EARTH WI 53515	Adult (A)	SEQ	11/30/2020	0/0	-17.99	Testing the fix to the Borrower Cart scroll bar.	Add to Cart
	26657000588803	DYNIX, DOWN 201 W MIFFLIN ST ATTN: MAD/MNS MADISON WI 00003	Adult (A)	BER	12/31/2999	0/0	0.00	29078005230076	Add to Cart
	29078007713343	DYNIX, HELEN L. 1318 ROSEDALE AVE MADISON WI 53714	Adult (A)	WID	11/02/2020	0/0	19.24		Add to Cart
	29078006067618	DYNIX, RITA BOOK 1000 NICHOLS RD MONONA WI 53716	Adult (A)	WID	01/31/2024	0/4	0.00		Add to Cart

- Click on the box in the first column to select the patrons you want to change or click the top left box to select all of the records in the search results.
- Click the button "Add to Borrower Cart." The cart will now have a number next to it, the number of patron records you selected to go into the cart.
- Click on the link to the cart "Borrower Cart #." You will be provided with a screen of fields that you can modify and will be applied to all of the patrons/borrowers in the cart.
- Click the "Batch Edit Borrowers" button.
- You will get a pop-up asking you to confirm that you wish to make changes to all of these records in the Borrower Cart.
- Make the changes and click the Save button at the bottom of the screen.
- The next screen is a report of the patrons you successfully batch edited along with a pop-up asking if you wish to clear the Borrowers Basket at this time. It is recommended that you clear the basket after every group of batch changes.

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• REMEMBER: Be responsible; any changes you make to a patron record are recorded, by login, in the patron edit history table.

O. CHANGING PASSWORDS FOR STAFF LOGIN ACCOUNTS

It is recommended that the passwords library staff use in their login accounts be changed on a regular basis or as needed after a staff member leaves employment at your library. Each library has at least two "staff" logins; the staffLIB and adminLIB logins. The admin login is the only login with permission to change staff passwords. Follow these steps to change the password for your staff login account(s).

- 1. Log into a session using your library's Staff Admin account.**
- 2. Access the Staff patron record.
- 3. Click on the Edit button for the Library Use section.
- 4. Change the Password.
- 5. Click the Save button at the bottom of the screen.

** Each library Director was given the login and password for the Staff Admin account for their library. If your library Director, or assigned staff, cannot remember the login and password for your Staff Admin login, please call the <u>SCLS Help Desk</u>. We will update and share information over the phone or via paper document in Delivery. We will not send updated login/password information via email.

- P. RELATED POLICIES
- <u>Patron records active barcodes, number of records</u>
- Patron Categories standardized parameters
- Adult Staff privileges and use of Internal patron category
- Patron data retention
 - Q. PATRON DATABASE CLEANUP PROCEDURES
 - 1. Changing a patron record from a Juvenile to an Adult patron category

This is a per library policy. Some libraries change their Juvenile records at age 16, some only after the patron's 18th birthday. Here are the instructions for converting Juvenile patron records (JU, LUJ) to Adult (AD, LU) categories.

- 1. Set-up your data search parameters.
 - Advanced Patron Search click on the Advanced Search Options hyperlink.
 - Patron Identity section / Patron branch = your library.
 - Patron Identity section / Category = Juvenile.
 - Date of birth section / Before date = 18 years before your set date. For example, if you want to convert all the Juvenile patrons that turned 18 on or before January 1, 2023, then subtract 18 from 2023 and enter the date in this field.
- 2. Scroll down to the bottom of the screen and click Search Patrons.

- 3. The system will extract a list of patrons that fit the criteria you entered. We do not have an export option from this page.
- 4. Review the records. Consider these issues:
 - If the juvenile record owes money; changing them to an Adult record may send the record to collections if your library is contracted with a collection agency. Libraries may decide not to convert a juvenile record with charges in order to prevent the account from being sent to collections and work with the patron to get the account cleaned up prior to changing the patron category.
 - Libraries may also decide to waive overdue charges incurred while the patron was a juvenile; especially if the library suspects that the fines were incurred by other family members. If the patron has Lost charges for items owned by another library, you must get permission from the library that owned the item and request that they waive those charges.
 - If the juvenile record is connected to a Guarantor (guardian), the link between the two records MUST be deleted, from the Juvenile record, or removed from the Leader's Patron Group, BEFORE you change the category to Adult.
- Records can be changed individually or can <u>be batch changed by using the Borrower Cart feature</u>. Read the directions thoroughly and <u>practice in the Sandbox</u> before using the Borrower cart feature in the Bibliovation Staff Client/Production database.

Repeat these steps to change LUJ (Limited Use-Juvenile) records to LU (Limited Use) or AD (Adult) records.

2. Patron Merge - Cleaning up duplicate patron records

This functionality is limited to the "LIB" Admin login. Go to <u>Circulation Manual Section 16 Circulation</u> <u>Tools</u> for explanation and instructions.

3. Annual Purge of Inactive Patrons

In December of each year, Inactive patron records will be purged from the system based on the following criteria:

- Patron record has had no issues (checkouts) for 2 years;
- Patron record has been expired for 1 year; and
- Patron has a balance of 20.00 or less.

SCLS staff will run a report of patron records, by Home library, which fit these criteria and will send the report(s) out to the libraries for review. After the review period, SCLS staff will re-run the report to remove any* updated records and will purge the remaining records from the shared patron database.

*If, during the review period, you see patron records on this report that you do not want purged, simply renew the record. You can choose to add a note to the record indicating that the record had been renewed without photo ID.

4. Annual Waive of "old" charges.

In November of each year, SCLS staff will run a report of all patron records that have the following:

- charges with a datestamp of 10 years old or older AND
- the *total old charges* for the patron are less than \$100.00.

The patron number and charges extracted will be submitted to LibLime with a request to "batch waive" all charges that fit the above parameters.

R. PATRON GROUP

Patron Group is an enhancement of the existing Guarantor/Guarantee functionality. Patron Group allows staff to connect patron records under a Leader of the Group. Staff will be able to check the Group and provide the Leader with the following information for all of the patrons in the group:

- Total number of holds (active and inactive total)
- Total number of Issues (checkouts)
- Total number of items overdue
- Total balance of fines (charges) owed

This is a useful tool for parents/guardians who want to know to know a summary of what their dependents have checked out and overdue.

We are currently blocking the display of the Patron Group information in the Discovery Layer to prevent confusion as this is a separate functionality from the LINKcat Mobile app Linked Accounts.

Staff create a Patron Group by accessing the link in the left sidebar menu on a patron record. For the record designated as the Leader, this will show any existing linked records, and provides options to link to additional existing records or create new patron records linked to the account.

Please do not add Adult records as dependents (despite some of the screen shots). During testing, we have found that adding an Adult patron as a dependent to a Patron Group, who also is a Leader for another Patron Group, seems to cause problems. For regular family groups, only assign one Adult as a Leader and add only juveniles as dependents. If you are creating a Patron Group for an Adult Leader, with a dependent that is also an Adult (caretaker, homebound liaison, etc., *make certain* that the dependent does not also have dependents.

Start in the record of the patron who will be the Leader. This will be the patron who monitors and/or manages the other accounts.

Search for patrons with the Surname of "Expired" and a library of "BAR".

TEST		TEST	TEST	TEST		TEST		-	EST TEST	TEST			
Search/Browse Patrons													
Add New Patron	L	Borrower Cart											
	Bro	wse by last name: <u>/</u>	BCDEEGHIJKLMN	OPQRSTUVWXYZ									
	Ad	vanced Patron	Search										
	Show Advanced Search Options												
	R	esults 1 to 4 of 4	found for "										
	Ad	d Selected Borrow	ers To Cart										
		Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note				
		29078007303608	EXPIRED, ANNIE 444 STREET MADISON WI 00000	Juvenile (C)	BAR	12/01/2024	0/0	0.00	re-test testing bc again	Add to Cart			
		29078006067741	EXPIRED. FLORENCE M. 122 MAIN ST TEST PATRON BARABOO WI 00000	Limited Use - Juvenile (C)	BAR	05/17/2021	0/0	0.50		Add to Cart			
	0	29078007446928	EXPIRED. GEORGE 333 DALTON ST TEST PATRON MADISON WI 00000	Adult (A)	BAR	11/04/2024	0/0	0.00		Add to Cart			
		29078007446936	EXPIRED_HAROLD 444 STREET MADISON WI 00000	Adult (A)	BAR	01/12/2026	0/0	0.00	Re-testing 7.02 fix for 61104 batch edit permission	Add to Cart			

Four records were extracted but HAROLD EXPIRED will only be the Leader/Guarantor for the two juveniles.

In Harold's Details screen, you can see that Annie is already connected to his account as a Guarantee.

			search Patro	ins			Search	the Catal	og		Check Out	Check	< In	
TEST	TEST			TES	τ			TES	T .		TEST	TEST	TEST	
HAROLD EXPIRED														
(29078007446936)	💠 New 🔻	🛒 Edit	⊚∞ C	hange l	Passw	ord	A Pri	nt 🕶 🗌	More 🕶					
	HAROLD		D (2907	8007	4469	36)								
						,								
	444 STREE	т									Library use			
2	MADISON	VI 00000									Card number: 2	9078007446	5936	
÷	Email (prima	irv):	holiversen(⊚sds i	nfo						Borrowernumber: 6	97559		
444 STREET	Initials:										Category: A	dult (AD)		
MADISON WI 00000	Date of birth		04/19/1939	•							Registration date: 0	5/30/2000		
holiversen@scls.info	Sex:		М								Expiration date: 0	1/12/2026		
Home Library: Baraboo-	Guarantees:										Library: B	araboo-Carr	negie Schadde Memorial Pu	blic Library
Carnegie Schadde	ANNIE EX	PIRED									Roles: [r	ione]		
Memorial Public Library	E 10										Category Roles:			
Check Out	Edit										PATRON			
Check out											Sort field 1:	ITERNAL		
Details	Upload Pat	on ima	ge								DL login: 2	9078007446	5936	
Patron Modification Log	EXPIRED. er	PIRED do iter the na	es not curre me of an im	ently ha nage file	ve an i e to upl	image : load.	availabl	e. To imp	ort an ima	ge for	DL password: *	****		
	Only PNG, G	IF, JPEG,	XPM forma	ts are s	upport	ted.					Circulation note: R	e-testing 7.0	02 fix for 61104 batch edit pe	rmission
Messages	Select the file	to upload:									Edit			
Proxy Borrowing	Choose File	No file ch	osen											
Detere Deveriesiese	Universit										Patron user prefe	rences		
Patron Permissions	Upload										Variable	Enable	d User value Role value	
Patron Accounting											Search behavior			
Patron Preferences	Patron me	ssagin	g prefer	ence	s						Messages and Notific	ations		
Patron Group	Asterisk (*) inc	licates a r	ole or cate	gory de	efault p	orefere	nce.				message_popup_durat	ion 🗌	10	
	Note that som	e messag	e types, su	ich as d	overdu	ie notic	ces, will	always	be deliver	ed by	predue_advance_days		2	
Lost Items	email in addition	on to any	settings se	lected I	below.						Timeouts			
History	Message		Override	Pon							server_timeout		9000	
Patron Merge	type	Scope	role	up	List	RSS	Email	TTtext	TTvoice	Digest	application_timeout		900	
	A		preis								SQL Reports			
	Circulation/F	ents	•								Holds Queue			
	Advance	Contin	9								Holds			
	Notice	Me	V				~				retain_hold_history		true	
		Sent to			_		_				Checkouts			

Click on the Patron Group link in the left sidebar.

		Search Patrons	Search the Catalog	Check	Out	Check In			
TEST	TEST	TEST	TEST	TES	т	TEST		TEST	TEST
HAROLD EXPIRED (29078007446936)	HAROLD EXPII This patron can view privileges allow. Add Existing Patron	RED :: Group the total issues, overdues an Add New Patron –	d fines for the following p	oatrons. Any	/ blocks may	v be overriden at th	e time of ch	eckout or placing	a hold, if staff
	First Name	Surname (Patron Catego	<i>гу</i>) н	lolds	Issues	Overdues	Fines	Actions	Blocks
<i>:</i>	HAROLD	EXPIRED (AD)		6	0	0	\$0.00	Leader	
444 STREET MADISON WI 00000	ANNIE	EXPIRED (JU)		7	0	0	\$0.00	Remove	
holiversen@scls.info Category: Adult (AD) Home Library: Baraboo- Carnegie Schadde Memorial Public Library Check Out Details Patron Modification Log Messages Proxy Borrowing Patron Permissions Patron Accounting Patron Accounting Patron Preferences Patron Group Lost Items		TOTALS		13	0	0	\$0.00		
History									
Patron Merge									

Florence Expired already has a record in the database, so I can click the "Add Existing Patron" button to link to her record to Harold's.

Enter the barcode or the name of the patron to add. Make sure the record displaying is the correct record before selecting it.

Staff <u>H</u> ome <u>C</u> irculation	n <u>P</u> atrons <u>S</u> ea	arch More 👻 🖪 Hide Masth	ead		-		L scastaff →
BR™		Select Patron					
		florence expire					
		Search Patro EXPIRED, FLORE	NCE M. (29078006067741)	697542 BAR	Check Ir		
TEST	TEST				TEST	TEST	TEST
HAROLD EXPIRED (29078007446936)	HAROLD EXPIF This patron can view privileges allow. Add Existing Patron First Name	RED :: Group rthe total issues, overdues and fine Add New Patron - Surname (Patron Category)	s for the following patrons. Holds	Any blocks may Issues	be overriden at the Overdues	time of checkout or Fines A	r placing a hold, if staff ctions Blocks
:	HAROLD	EXPIRED (<i>AD</i>)	6	0	0	\$0.00 Leade	er
444 STREET MADISON WI 00000	ANNIE	EXPIRED (<i>JU</i>)	7	0	0	\$0.00 Remo	ove
holiversen@scls.info Category: Adult (AD) Home Library: Baraboo- Carnegie Schadde Memorial Public Library		TOTALS	13	0	0	\$0.00	

		Search Patrons Search the Ca	talog Che	ck Out	Check In			
TEST	TEST	TEST TE:	ST TE	ST	TEST		TEST	TEST
HAROLD EXPIRED (29078007446936)	HAROLD EXP This patron can vie privileges allow. Add Existing Patro	IRED :: Group w the total issues, overdues and fines for t M Add New Patron •	the following patrons. A	ny blocks ma	y be overriden at th	e time of che	ckout or placing	a hold, if staff
	First Name	Surname (Patron Category)	Holds	Issues	Overdues	Fines	Actions	Blocks
?	HAROLD	EXPIRED (AD)	6	0	0	\$0.00	Leader	
444 STREET MADISON WI 00000	FLORENCE M.	EXPIRED (<i>LUJ</i>)	3	0	0	\$0.50	Remove	
holiversen@scls.info Category: Adult (AD)	ANNIE	EXPIRED (JU)	7	0	0	\$0.00	Remove	
Carnegie Schadde Memorial Public Library		TOTALS	16	0	0	\$0.50		
Check Out								
Details								
Patron Modification Log								
Proxy Borrowing								
Patron Permissions								
Patron Accounting								
Patron Preferences								
Patron Group								

Note that the Details tab for the leader record now shows both records linked under the Guarantees header.

			Search the Catalog	Check Out	Check In		
TEST	TEST	TEST	TEST	TEST	TEST	TEST	TEST
HAROLD EXPIRED (29078007446936)	⇔ New ▼ 👔 E	Edit 🕞 🕬 Change Password	🚝 Print 🔻 🛛 More 👻				
	HAROLD EXPI	RED (29078007446936))				
	444 STREET			Library use			
?	MADISON WI 000	000		Card number:	29078007446936		
	Email (primary):	holiversen@scls.info		Borrowernumber:	697559		
444 STREET	Initials:			Category:	Adult (AD)		
MADISON WI 00000	Date of birth:	04/19/1939		Registration date:	05/30/2000		
Cotogoour Adult (AD)	Sex:	м		Expiration date:	01/12/2026		
Home Library: Baraboo-	Guarantees:			Library:	Baraboo-Carnegie Scha	dde Memorial Public Library	
Carnegie Schadde	FLORENCE M. E	XPIRED		Roles:	[none]		
Memorial Public Library	ANNIE EXPIRED	2		Category Roles:			
Check Out	Edit			Sort field 1:	INTERNAL		
Details	Unload Patron In	nade		DL login:	29078007446936		
	opioau Fation III	nage		DL password:	***		

If you try to add a person to the group, and that person is already a member of another group, you will get a screen warning:

Staff Home Circulation Patrons Sear	ch More + 🖪 Hide Masthead	L scastaff →
	C Are you sure?	
	Patron is a member of another group. Add this member to this group anyway?	ek in
TEST TEST	Yes No	TEST TEST
HAROLD EXPIRED HAROLD EXPIRE	ED :: Group	

If you click Yes, the person will be removed from the other group and added to this one.

Another option from the Patron Group tab is to add a new patron record. Click the Add New Patron button. This will open a screen for adding a new patron, with the guarantor link already established:

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TEST	TEST	TEST TE:	ST	TE	ST	TEST		TEST	TEST
HAROLD EXPIRED (29078007446936)	HAROLD EXPIR	ED :: Group the total issues, overdues and fines for t	the following	g patrons. Ar	ny blocks may	be overriden at th	e time of ch	eckout or placing a	a hold, if staff
	privileges allow.	Add New Patron -							
	First Name	Adult		Holds	Issues	Overdues	Fines	Actions	Blocks
?	HAROLD	Adult Staff		6	0	0	\$0.00	Leader	
444 STREET MADISON WI 00000	FLORENCE M.	Do not use - Administrative Staff		3	0	0	\$0.50	Remove	
holiversen@scls.info Category: Adult (AD)	ANNIE	DoNotUse		7	0	0	\$0.00	Remove	
Home Library: Baraboo- Carnegie Schadde Memorial Public Library		Homebound		16	0	0	\$0.50		
Check Out		Inter Library Loan							
Details		Internal							
Messages		LINK Express							
Proxy Borrowing		Limited Use							
Patron Permissions		MFD-Half Year Paid							
Patron Accounting		MFD-Pay Per Item							
Patron Group		MFD-Year Paid Non-Reciprocal							
Lost Items		Organization							
History		Outer Library Loan Permissions Role							

Select the Patron Category from the list and create the new patron record.

Fill in all necessary and required fields and save. The new patron record is created with a link to the Leader record and the leader's Patron Group screen now displays the new group member:

		Search Patrons Sear	ch the Catalog (heck Out	Check In			
TEST	TEST	TEST	TEST	EST	TEST		TEST	TEST
HAROLD EXPIRED (29078007446936)	HAROLD EX This patron can privileges allow. Add Existing Pa	KPIRED :: Group view the total issues, overdues and fir atron Add New Patron -	nes for the following patrons	. Any blocks ma	ay be overriden at the	time of che	eckout or placing	a hold, if staff
	First Name	Surname (Patron Category) Holds	Issues	Overdues	Fines	Actions	Blocks
:	HAROLD	EXPIRED (AD)	6	0	0	\$0.00	Leader	
444 STREET MADISON WI 00000	FLORENCE M.	EXPIRED (LUJ)	3	0	0	\$0.50	Remove	
holiversen@scls.info Category: Adult (AD) Home Library: Baraboo-	ANNIE	EXPIRED (JU)	7	0	0	\$0.00	Remove	
Carnegie Schadde Memorial Public Library	SALLY	SKELLINGTON (AD)	0	0	0	\$0.00	Remove	
Check Out		TOTALS	16	0	0	\$0.50		
Details								
Patron Modification Log								
Messages								
Proxy Borrowing								
Patron Permissions								
Patron Accounting								
Patron Preferences								
Patron Group								

Add as many family members as needed to this leader/parent/head of household/guardian record. This record will show all members and their circulation status in the Leader's Patron Group screen; the dependent records will only show a link to the Leader record in their Details screen.

	(Search Patro	ins		Search	the Catal	log		Check Out	Check	In			
TEST	TEST		_	TES	r i		TES	т		TEST	TEST		TEST		TEST
SALLY SKELLINGTON (29078021120335)	♦ New ▼	💕 Edit	e e e e e e e e e e e e e e e e e e e	hange F	Passwor	rd 🖉 Pri	int 🗸 🗌	More 🕶							
	SALLY SK	ELLING	GTON (2	9078	02112	20335)									
	444 STREE	т								Library use					
?	MADISON V	VI 00000								Card number:	29078021120	335			
	Email (prima	ry):	holiversen(@ <u>scls.ir</u>	<u>nfo</u>					Borrowernumber:	1380288				
444 STREET	Initials:									Category:	Adult (AD)				
MADISON WI 00000	Date of birth	:	12/31/1960)						Registration date:	09/19/2022				
Category Adult (AD)	Sex:									Expiration date:	09/19/2026				
Home Library: Baraboo-	Guarantor:		EXPIRED.	HARO	LD					Library:	Baraboo-Carn	egie Schadde	Memorial Pul	blic Library	
Carnegie Schadde					_					Roles:	[none]				
Memorial Public Library	Edit									Category Roles: PATRON					
Check Out	Upload Patr	on Ima	ae							Sort field 1:			D (DANE)		
Details	SALLY SKEL	LINGTON	does not c	urrently	have ar	n image avai	lable. To	import an i	mage	DL login: 29078021120335					
Details	for SKELLING	TON, ent	er the nam	e of an i	image fi	le to upload.		1	-	DL login.	******	55			
Patron Modification Log	Only PNG, G	IF, JPEG,	XPM forma	ts are s	upporte	d.				DE password.					
Messages	Select the file Choose File	to upload: No file ch	osen							Edit					
Proxy Borrowing	Upload									Patron user pre	ferences				
Patron Permissions										Variable	Enabled	User value	Role value		
Patron Accounting										Search behavior					
i di on riccounting	Patron me	ssagin	g prefer	ence	s					Messages and Noti	fications				
Patron Preferences	Asterisk (*) ind	icates a r	ole or cate	gory de	fault pr	eference.				message_popup_du	ration		10		
Patron Group	Note that some	e messag	e types, su	ich as o	verdue	notices, wil	l always	be deliver	ed by	predue_advance_da	ys 🗌		2		
Lost Items	email in additio	on to any	settings se	lected b	pelow.					Timeouts					
Lost items	Mossago		Override	Pon						server_timeout			9000		
History	type	Scope	role	up	List F	RSS Email	TTtext	TTvoice	Digest	application_timeout			900		
Patron Merge	A	ante.	preis							SQL Reports					
	Announceme	mts								Holds Quana					

There are similar displays available to the patron under a Patron Group section of the Discovery Layer dashboard: WE NOT CURRENTLY DISPLAYING THE PATRON GROUP INFORMATION IN THE DISCOVERY LAYER IN CASE OF CONFUSION WITH THE LINKED RECORDS OPTION IN THE LINKCAT MOBILE APP.

A "dependent" patron can be removed from the group at any time, regardless of current circulation status. This does not delete the patron record; it just removes it from this group.

From the Leader's Patron Group screen, click the Remove button:

HAROLD EXPIRED (29078007446936)	HAROLD EXPIR This patron can view privileges allow. Add Existing Patron	ED :: Group the total issues, overdues and fines for t Add New Patron •	he following patrons. A	ny blocks may	/ be overriden at th	e time of ch	eckout or placing	a hold, if staff
	First Name	Surname (Patron Category)	Holds	Issues	Overdues	Fines	Actions	Blocks
-	HAROLD	EXPIRED (AD)	6	0	0	\$0.00	Leader	
444 STREET MADISON WI 00000	FLORENCE M.	EXPIRED (<i>LUJ</i>)	3	0	0	\$0.50	Remove	
holiversen@scls.info Category: Adult (AD)	ANNIE	EXPIRED (JU)	7	0	0	\$0.00	Remove	
Carnegie Schadde Memorial Public Library	SALLY	SKELLINGTON (AD)	0	0	0	\$0.00	Remove	
Check Out		TOTALS	16	0	0	\$0.50		

And click Yes in the pop-up to confirm



From the Guarantee's record, on the Patron Group tab, click the Remove button and confirm.

B™	Enter patron card numbe	er or partial name order by	/: Surname 🗸	•		
TEST	Search Patrons	Search the Catalog	Check Out	Check In	TEST	TEST
FLORENCE M. EXPIRED FLO (29078006067741) Patron	RENCE M. EXPIRED :: Group	IOLD EXPIRED Remove				

And click Yes in the pop-up to confirm.

Stan nome Circulation Fations				L scastaff →
	🕑 Are you sure?			
	Confirm patron removal from this group.			
TEST TEST	Yes	No eck In	TEST	TEST
FLORENCE M. EXPIRED (29078006067741) Patron is a depen	1. EXPIRED :: Group dent of patron account HAROLD EXPIRED Remove			
B	Enter patron card number or partial name order by: Surname	Check In	_	
TEST TEST	TEST TEST TEST	TEST	TEST	TEST
FLORENCE M. EXPIRED (29078006067741) Patron is no longe Patron is no longe 122 MAIN ST 122 MAIN ST 125 PATRON BARBOD W00000	1. EXPIRED :: Group er a dependent. Add to another Patron's Group			
				-

In that patron's record, you will see a button that provides the option to link this patron record to another family group. Click that button and enter another Leader name.

Staff <u>H</u> ome <u>C</u> i	irculation <u>P</u> atrons	<u>S</u> earch More	🗕 🖪 Hide	Masthead			SCLS Headquarters	L scastaff →
AB	м	Enter patror	Select Pat	tron or				
		Search Patro	EXPIRED,	GEORGE (290780074469	28) 697556 MAD	Check In		
TEST	TEST					TEST	TEST	TEST
FLORENCE M. E	APPRED FLORENCE Patron is no lor	M. EXPIRED ::	Group add to anothe	r Patron's Group				
BR		Enter patron ca	ard number of	r partial name order b	y: Surname 🗸 🕨	•		
		Search Patrons		Search the Catalog	Check Out	Check In		
TEST	TEST	те	ST	TEST	TEST	TEST	TEST	TEST
FLORENCE M. E	Patron is a dep	M. EXPIRED ::	Group count GEORGI	E EXPIRED Remove				

Then check the Leader's Patron Group screen to confirm the change.

B™		Enter patron card number or part	ial name order by:	Surnar	ne 🗸	Þ			
		Search Patrons Searc	th the Catalog	Cheo	tk Out	Check In			
TEST	TEST	TEST	TEST	TE	ST	TEST		TEST	TEST
GEORGE EXPIRED (29078007446928)	GEORGE EXPIF This patron can view privileges allow. Add Existing Patron	RED :: Group the total issues, overdues and fin Add New Patron -	es for the following p	atrons. Ar	ny blocks may	r be overriden at th	e time of ch	eckout or placing a	a hold, if staff
	First Name	Surname (Patron Category)) F	lolds	Issues	Overdues	Fines	Actions	Blocks
:	GEORGE	EXPIRED (AD)		3	0	0	\$0.00	Leader	
333 DALTON ST TEST PATRON	FLORENCE M.	EXPIRED (LUJ)		3	0	0	\$0.50	Remove	
MADISON WI 00000 *608-266-6069	JAMES	EXPIRED (WEB)		6	0	0	\$3.80	Remove	
Home Library: Madison PL- Central	KAREN	EXPIRED (AD)		0	0	0	\$40.00	Remove	
Check Out	MIRANDA	EXPIRED (AD)		0	0	0	\$0.00	Remove	
Details Patron Modification Log		TOTALS		12	0	0	\$44.30		

If a patron is a dependent member of a family group, their record must be removed from the group before you can delete the record. This can be done either from the Leader record, or from the dependent record.

If you want to delete the leader/parent record, you must first remove, or relink to a new leader, all of the dependent records.

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S. PATRON DELETE

See <u>Section XV! Circulation Tools</u> for information about deleting patron records.

T. PROXY BORROWING (BORROWER RELATIONSHIPS)

Proxy Borrowing automates the current manual process of Holds Pickup Authorization.

When the permissions are enabled, staff will be able to connect patron records together, allowing proxy borrowing.

In a patron record, staff will see the "Proxy Borrowing" link in the left sidebar. See the Patron Note that indicates that Harold has Hold Pickup Authorization (HPA) to pickup holds for Annie Expired.

			, i i i i i i i i i i i i i i i i i i i			check		
TEST	TEST	TEST	TEST	TEST	TEST		TEST	TEST
HAROLD EXPIRED (29078007446936)	♦ New - Edit Patron alert: ▲ The patron has 3 Clear Screen	Change Password	E Print • More • M	ute Sounds	Search to place hold f Patron notes:	or HAROLD EXPIF	ED (29078007446936	5) Search To Hold
LANE MAZOMANIE WI 53560 608-242-4711 holiversen@scis.info Category: Adult (AD) Home Library: Baraboo- Carnegie Schadde Memorial Public Library	Checking out to HA Enter item barcode or Specify Due Date:	ROLD EXPIRED (2907800) r text: Check member for Session: Clear	7446936) Out		01/28/2022 BAR * 04/27/2011 SCA * holds. * Delete Add A New Note	Permission to pic Hold Pickup Auth Archive	kup holds for Annie orization: has permis	Expired." Delete Archive sion to pickup Florence Exp
Check Out Details	show Checked Out (4)	Fines & Charges (0.00)	On Hold (7) Circulation Hist					
Patron Modification Log								
Proxy Borrowing	Date 1	litle		Date checked out	Check out	Item type	Call number	Renew select all I none
Patron Accounting	02/11/2022 The 390	mask and mirror (sound reco 78054143566	rding] / , by McKennitt, Loreen	a, 01/28/2022	SCA	CDAMS	CD NEW AGE MCK	(0 of max 2)
Patron Preferences	02/09/2022 Gey	sers / , by Gilbert, Sara 3907	3101349273	01/12/2022	SCA	BKJ28	+551.23 GIL	Not Renewable On Hold
Lost Items	02/09/2022 ANC	TEHR MFD FAST ADD 0001	2345678912	01/12/2022	SCA	ILL28		Not Renewable 0 of max 0
cost tierns	02/09/2022 MFC) FAST ADD 8905788448800	0	01/12/2022	SCA	ILL28		Not Renewable 0 of max 0
History								Banawal dua data:





Click the "New" button and select Borrowing relationship. You will see this screen:



It is important to search for patrons by patron barcode or by name, in LASTNAME, FIRSTNAME order. Search for EXPIRED, ANNIE

HAROLD EXPIRED (29078007446936)	New Edit Change Password Print More Add a new Borrowing Relationship for HAROLD EXPIRED Search for a patron
TEST PATRON 2424 WINDING ROAD LANE	Expired. EXPIRED, ANNE (29078007003608) - TEST PATRON, MAC EXPIRED, FLORENCE M. (29078006067741) - 333 DALTO EXPIRED, GEORGE (29078006068103) - 333 DALTON ST EXPIRED, HAROLD (29078007446936) - TEST PATRON, M EXPIRED, HAROLD (29078007446973), or SET PATRON, M EXPIRED, HAROLD (29078007446973), or SET PATRON, M
608-242-4711 holiversen@scls.info Category: Adult (AD) Home Library: Baraboo- Carnegie Schadde Memorial Public Library	Expired, Jane (29078007449294) - 111 STREET, PRAIRIE DJ EXPIRED, KAREN (29078007449895) - 111 STREET, MADT EXPIRED, LAZLOW (29078007460037) - 980 STREET, MA EXPIRED, MIRANDA (29078006068343) - TEST PATRON, 1 EXPIRED, SPENCER (29078015544987) - TEST PATRON, 1
Check Out	
Patron Modification Log	
Messages	
Proxy Borrowing	
Patron Permissions	
Patron Accounting	

Select the correct patron record.



"Direction" field:

• Confirm that the radio button "Allow HAROLD EXPIRED to borrow for this patron" is checked.

"Date Relationship expires" field

• This field defaults to "[no date]".

"Active" field

• This field defaults to "Active".

There are directions later in this document that describes how to set an expiration date or change a relationship to inactive once the relationship is established.

Click "Save" to save the relationship. Now you will see the relationship on the screen.

·		Search Patrons	Search the Cata	log	Check Out	Check In	_	
TEST	TEST	TEST	TES	т	TEST	TEST	TEST	TEST
HAROLD EXPIRED (29078007446936)	⇔ New ▼ HAROLD EXP	Edit 🕞 Change Password	erint →	More ▼	eople			
	Name	Date Expires	Active					
?	ANNIE EXPIRED		● Yes ○ No	Save <u>Delete</u>				

If the patrons have a reciprocal relationship, follow the same steps above but make this change in the "Direction" field:

• Confirm that the radio button "Allow this patron to borrow for HAROLD EXPIRED" is checked.



Save the relationship.

Now, in the screen, you will see that both relationships are displayed.

TEST	TEST	TEST	TEST	TEST	TEST	TEST	TEST
AROLD EXPIRED							
29078007446936)							
	🕂 New 🔻 🛛 😭	Edit Sem Change Password	🚝 Print 🕶 Mor	re 🔻			
	HAROLDEXH	IRED can borrow mate	erials for the follo	owing people			
	Name	Date Expires	Active				
2	ANNIE EXPIRED		Ves O No Save	Delete			
TEST PATRON	The fellowing	needle een herreur	taviale for UADC				
2424 WINDING ROAD	The following	people can borrow ma	aterials for HARC	DEDEXPIRED			
MAZOMANIE WI 53560	Name	Date Expires	Active				
608-242-4711	ANNIE EXPIRED		🗉 💿 Yes 🔿 No 🛛 Save	Delete			
holiversen@scls.info							
Category: Adult (AD)							
ome Library: Baraboo-							
Carnegie Schadde							
emorial Public Library							
Check Out							
check out							
Details							
ron Modification Log							
Messages							
Provy Borrowing							
riony borrowing							
Patron Permissions							
Patron Accounting							
Factori Accounting							

STEPS AT CHECKOUT

Annie has a hold waiting for her at BAR. Harold is in the library to browse items and is also picking up Annie's hold.

There are two ways to proceed but only one way clears Annie's hold request and marks it as issued.

PREFERRED CHECKOUT STEPS

Access Harold's record. Below the "Clear Screen button you will see the phrase "Checking out to HAROLD EXPIRED (29078007446936) for [Self]. This pull-down menu option is a result of the addition of a borrowing relationship.

Clear Screen	
Checking out to HAROLD EXPIRED (29078007446936) for Self	
Enter item barcode or text:	
Check Out	
Specify Due Date:	
Remember for Session: Clear	
Specify Checkout Date:	
show	

Once you click the arrow, you will see the optional relationship

Clear Screen		
Checking out to HAROLD EXPIRED (29078007446936) for	Self	~
Enter item barcode or text:	Self	
	ANNIE EXPIRED	
Check Out		
Specify Due Date:		
Remember for Session: Clear		
Specify Checkout Date:		
show		

For this example, we will have staff select ANNIE EXPIRED for the checkout (as the hold is on her record).

		Search Patrons	Search the Catalog	Ch	eck Out	Check In		
TEST	TEST	TEST	TEST	TEST	TEST	TE	эт	TEST
HAROLD EXPIRED (29078007446936)	⇔ New ▼	Edit Email Change Password	E Print • More • Mut	e Sounds				
?	Patron alert	as 3 overdue items checked out.						
TEST PATRON 2424 WINDING ROAD LANE MAZOMANIE WI 53560 608-242-4711	Clear Screen Checking out to Enter item barco	o HAROLD EXPIRED (29078007) de or text:	46936) for ANNIE EXPIRE	Se F	earch to place hold for H Patron notes: 01/28/2022 BAR "Pen 04/27/2011 SCA "Hold	AROLD EXPIRED	(29078007446936) holds for Annie Ex tion: has permissi	Search To Hold pired." Delete Archive on to pickup Florence Expire
holiversen@scls.info Category: Adult (AD) Home Library: Baraboo- Carnegie Schadde Memorial Public Library	Specify Due Date:	Remember for Session: Clear	ut		Add A New Note	hive		
Check Out	show							
Patron Modification Log	Checked Out (4	4) Fines & Charges (0.00) On	Hold (7) Circulation History					
Messages	Checked O	ut						
Proxy Borrowing Patron Permissions	Date 🔒	Title	٥	Date checked out	Check out library	• Item •	Call number	Renew select all none
Patron Accounting	02/11/2022	The mask and mirror [sound record 39078054143566	ing] / , by McKennitt, Loreena,	01/28/2022	SCA	CDAMS	CD NEW AGE MCK	(0 of max 2)
Patron Preferences	02/09/2022	Geysers / , by Gilbert, Sara 390781	01349273	01/12/2022	SCA	BKJ28	+551.23 GIL	Not Renewable On Hold
Lost Items	02/09/2022	ANOTEHR MFD FAST ADD 00012	345678912	01/12/2022	SCA	ILL28		Not Renewable 0 of max 0
History	02/09/2022	MFD FAST ADD 89057884488000		01/12/2022	SCA	ILL28		Not Renewable 0 of max 0
Patron Delete								Renewal due date:
							Override Renewal	Blocks: Renew checked ite

Check out the item on hold

D								
		Search Patrons	Search the Catalog	0	neck Out	Check I	n	
TEST	TEST	TEST	TEST	TEST	TEST	т	EST	TEST
HAROLD EXPIRED (29078007446936)	♦ New ▼	Edit 🛛 🐖 Change Password	Print ▼ More ▼ Mu	te Sounds				
?	Patron alert:	s 3 overdue items checked ou	ıt.					
TEST PATRON 2424 WINDING ROAD LANE	Clear Screen				Search to place hold for Patron notes: > 01/28/2022 BAR "Pe	HAROLD EXPIRE	ED (29078007446936 up holds for Annie (6) Search To Hold Expired." Delete Archive
MAZOMANIE WI 53560	Enter item barcod	e or text:	(440930) IOI ANNIE EXPIRE		» 04/27/2011 SCA "Ho	Id Pickup Autho	rization: has permis	ssion to pickup Florence Exp
MAZUMANIE WI 53560 608-242-4711 holiversen@scls.info Category: Adult (AD) Home Library: Baraboo-	Enter item barcod 3907807 Specify Due Date:	e or text: 2375422 Check			04/27/2011 SCA "Ha holds." Delete A Add A New Note	Id Pickup Autho rchive	rization: has permis	ssion to pickup Florence Ex
MA2UMANIE WI 53560 608-242-4711 holiversen@scls.info Category: Adult (AD) Home Library: Baraboo- Carnegie Schadde Memorial Public Library Check Out	Specify Checknut Date:	Remember for Session: Cites			04/27/2011 SCA "Ho holds." Delete A Add A New Note	Id Pickup Authon rchive	rization: has permis	ssion to pickup Florence Exj
MACUMANIE WI 53560 608-242-711 holiversen@scls.info Category: Adult (AD) Home Library: Baraboo- Carnegie Schadde Memorial Public Library Check Out Details cron Modification Log	Specify Checkout Date:	Arctocic Expirate (290 and a constraint) Arctocic Expirate (200 and a constraint) Arctocic Expirat	Out	y j	04/27/2011 SCA "Ha holds." Delete É Add A New Note	Id Pickup Autho rchive	rization: has permis	ssion to pickup Florence Exp
MACUMANIE WI 53560 608-324-711 holiversen@scis.info Category: Adult (AD) Home Library: Baraboo- Carnegie Schadde Memorial Public Library Check Out Details tron Modification Log Messages	Specify Checked Out (4) Checked Out (4)	ARCOD EAPIRED (29/300 e) 2375422 Check Remember for Session: Ciesy ar Fines & Charges (0.00) (It	Out Out Out Out Out On Hold (7) Circulation Histor	v	O4/27/2011 SCA "Ho holds." Delete £ Add A New Note	<u>ld Pickup Authon</u> r <u>chive</u>	rization: has permis	ssion to pickup Florence Exp
MA2CUMANIE WI 53560 608-324-2711 holiversen@scls.info Category. Adult (AD) iome Library. Baraboo- Carnegie Schadde Memorial Public Library Check Out Details ron Modification Log Messages Proxy Borrowing Patron Permissions	Specify Due Date: Specify Due Date: Specify Due Date: Specify Checkout Date Show Checked Out (4) Checked Out Date due	RACOL PAPIKED (29/300 a) a r faxt: 2375422 Check Remember for Session: Ciesy ar Fines & Charges (0.00) C it Title	Out Out On Hold (7) Circulation Histor	y Date checked out	O427/2011 SCA "Ho holds." Delete A Add A New Note Check out library	Item type	Call number	sion to pickup Florence Exp
MA2CUMANIE WI 53560 608-324-2711 holiversen@scls.info Category. Adult (AD) tome Library. Baraboo- Carnegie Schadde Memorial Public Library Check Out Details ron Modification Log Messages Proxy Borrowing Patron Permissions Patron Accounting	Checked Out (4) Checked Out (4) Checked Out (4) Checked Out (4) Oz(11/2022	ARCOLD EXPIRED (29/300 a) or fact: 2375422 Check Remember for Session: Ciesy ac Fines & Charges (0.00) C it Title Title	Out	y Date checked out Date checked	O427/2011 SCA "Ho holds." Delete A Add A New Note Check out library SCA	tid Pickup Author rchive titem type CDAMS	Call number CD NEW AGE MCK	Renew Renew Select all I none O (0 of max 2)
MACUMANIE WI 53560 608-324-711 holiversen@sds.info Category. Adult (AD) Home Library. Baraboo- Carnegie Schadde Memorial Public Library Oteck Out Details ron Modification Log Messages Proxy Borrowing Patron Accounting Patron Accounting Patron Preferences	Checked Out (4 Checked Out (4 02/11/2022 3 02/09/2022 5	Renember for Session: Clear ex- Fines & Charges (0.00) (It Title Title The mask and mirror (sound reco 90/78054143562	Out	y Date checked out 1/128/2022 01/12/2022	OA272011 SCA "Ho holds." Delete @ Add A New Note Check out library SCA SCA	Item type CDAMS BKJ28	Call number CD NEW AGE MCK +55123 GIL	Renew Renew Joint of pickup Florence Exp
MACUMANIE WI 53560 608-242-711 holiversen@sds.info Categor; Adult (AD) Home Library: Baraboo- Carnegie Schadde Memorial Public Library Check Out Details tron Modification Log Messages Proxy Borrowing Patron Permissions Patron Preferences Log Imper-	Checked Out (4) Checked Out (4) Checked Out (4) Checked Out (4) Checked Out 02/11/2022 1 02/09/2022 6	ARCOLD EXPIRED (29/300 a) ar fact. 2375422 Check Remember for Session: Cear ar: Fines & Charges (0.00) (It Title The mask and mirror (sound reco 90/78054143566 Seysers /, by Gilbert, Sara 3907 NOTEHR MED FAST ADD 000	Out Out On Hold (7) Circulation Histor rding)/, by McKennitt, Loreena 8101349273 12345678912 12	y Date checked out 01/28/2022 01/12/2022	OA/27/2011 SCA "Ho holds." Delete # Add A New Note Check out library SCA SCA SCA	Item type CDAMS BKJ28 ILL28	Call number CD NEW AGE MCK -551.23 GIL	Renew Renew seisst all I none (0 of max 2) Not Renewable <u>On Hold</u> Not Renewable 0 of max
MACUMANIE WI 53560 608-242-711 holiversen@scis.info Categor; Adult (AD) forme Library: Baraboo- Carnegie Schadde Memorial Public Library Check Out Details ron Modification Log Messages Proxy Borrowing Patron Accounting Patron Accounting Patron Accounting Patron Preferences Lost Items	Checked Out (4) Checked Out (4) Checke	ARCOD EXPIRED (29/300 a) ar fact. 2375422 Check Remember for Session: Ciear ar: Fines & Charges (0.00) C It Title The mask and mirror (sound reco 9078054143566 Servers J, by Gilbert, Sara 3907 MOTEHR MED FAST ADD 000 (FD FAST ADD 8905788448800)	Out Out On Hold (7) Circulation Histor yrdinoj/, by McKennitt, Loreena 8101349273 12345678912 10	y Date checked out Date checked	O4/27/2011 SCA *He holds.** Delete A Add A New Note SCA SCA SCA SCA	Item type CDAMS Kl28 Kl28 ILL28	Call number Co NEW AGE +551.23 GIL	Renew zelectall i none (0 of max 2) Not Renewable Qo Hold Not Renewable Q of max Not Renewable Q of max

ILS Circulation Manual ver. 7.02

Patron Record and Registration

This block will appear on the checkout screen

HAROLD EXPIRED (29078007446936)		
	Cannot check out item Vitamin C :	Patro
2	Please resolve the following conditions:	🔺 Th
TEST PATRON 2424 WINDING ROAD LANE MAZOMANIE WI 53560 608-242-4711 holiversen@scls.info Category: Adult (AD) Home Library: Baraboo- Carnegie Schadde Memorial Public Library	 The item is on hold and marked as WAITING for ANNIE EXPIRED (29078007303608, Baraboo-Carnegie Schadde Memorial Public Library). Override Block? Process hold, do NOT check out 	

Click the Override block checkbox and then the Override blocks and checkout button.

You will see information on the checkout screen that the items was checked out to Annie Expired.

TEST	TEST	TEST	TEST	TEST	те	ST	-	EST	TEST
HAROLD EXPIRED (29078007446936)	💠 New 🔻 📑	Edit 🕞 Change Password		Mute Sounds					
?	Patron alert	as 3 overdue items checked o	ut.						
TEST PATRON 2424 WINDING ROAD LANE	Clear Screen		07446036) for ANNIE EYD	IPED w	Search to place he Patron notes: 01/28/2022 BA	old for HAROLD E	XPIRED	(29078007446936) holds for Annie E	Search To Hold
MAZOMANIE WI 53560 608-242-4711 holiversen@scls.info	Checkout succe Enter item barcoo	ssful to ANNIE EXPIRED (2907 de or text:	'8007303608)		04/27/2011 SC holds." Dele	A "Hold Pickup A te Archive	Authoriz	ation: has permiss	ion to pickup Florence Expired
Category: Adult (AD) Home Library: Baraboo-		Check	< Out		Add A New N	ote			
Carnegie Schadde	Specify Due Date:								
Memorial Public Library	Specify Checkout Da	I Remember for Session: U Clear							
Check Out	show								
Details									
Patron Modification Log	Checked Out (4	4) Fines & Charges (0.00)	On Hold (7) Circulation Hi	story					
Messages	chicolica our (i	I mos a charges (s.ss)		otory					
Proxy Borrowing	Checked O	ut							
Patron Permissions	Date due	Title		 Date checked out 	Check of library	ut _† Iten typ	1 9 *	Call number *	Renew select all none
Patron Accounting	02/11/2022	The mask and mirror [sound rec Loreena, <u>39078054143566</u>	ording]/, by McKennitt,	01/28/2022	SCA	CDAM	S	CD NEW AGE MCK	(0 of max 2)
	02/09/2022	Geysers / , by Gilbert, Sara 3907	78101349273	01/12/2022	SCA	BKJ28		+551.23 GIL	Not Renewable On Hold
Lost items	02/09/2022	ANOTEHR MFD FAST ADD 000	12345678912	01/12/2022	SCA	ILL28			Not Renewable 0 of max 0
History	02/09/2022	MFD FAST ADD 890578844880	00	01/12/2022	SCA	ILL28			Not Renewable 0 of max 0
Patron Delete									Renewal due date:
								Override Renewal E	Blocks: Renew checked items

The item is not checked out to Harold's record, is listed as a checkout on Annie's records and recorded in her Holds History as "issued".

TEST	TEST TEST TEST TEST	TEST TEST TEST TE					
ANNIE EXPIRED (29078007303608)							
	Edit Change Password Print • More • Mute Sounds						
	Patron alert:						
?	A The patron has 4 overdue items checked out.						
TEST PATRON 4610 S BILTMORE LN #101	Clear Screen	Search to place hold for ANNIE EXPIRED (29078007303608) Search To Hold Patron notes:					
MADISON WI 53718 608-242-4711	Checking out to ANNIE EXPIRED (29078007303608) for Self	02/11/2022 SCA "HPA for HAROLD EXPIRED." Delete Archive					
holiversen@scls.info Category: Juvenile (JU)	Check Out	Add A New Hole					
Carnegie Schadde Memorial Public Library	Specify Due Date:						
Check Out	Specify Checkout Date:						
Details	SILVY						
Patron Modification Log	Checked Out (6) Fines & Charges (0.00) On Hold (2) Circulation History						
Proxy Borrowing	Checked Out						
Patron Permissions	Date _ Title	Date Check out Item Call Renew					
Patron Accounting Patron Preferences	03/11/2022 Vitamin C : the real story : the remarkable and controversial healing factor / , by Hickey, Steve, 39078072375422	02/11/2022 SCA BKA28 615.328 H526v 0 (0 of max 2)					
Lost Items	02/23/2022 Mobituaries : great lives worth reliving / , by Rocca, Mo <u>39078102417947</u>	01/26/2022 SCA BKA28 920.02 R581m (0 of max 2)					
History	02/08/2022 Meet Godzilla /, by Greenberger, Robert. <u>39078058825259</u>	01/11/2022 SCA BKJ28 +791.43 GRE Hold					
Patron Delete	02/08/2022 saw in the home workshop with more than three hundred photographic illustrations and line drawings_39078020258613	01/11/2022 SCA BKA28 621.9 GET C (0 of max 2)					
	02/08/2022 JV-Problem #01 39078035361352	01/11/2022 SCA BKA28 MAD NF Not Renewable On Hold					
	02/08/2022 JV-Problem #01 39078035361535	01/11/2022 SCA BKA28 MAD NF Not Renewable On Hold					
		Renewal due date:					
		Override Renewal Blocks:					
-							
	Search Patrons Search the Catalog	Check Dut Check In					
TEST	TEST TEST TEST TEST	TEST TEST TEST TE					
ANNIE EXPIRED (29078007303608)	i Edit i i i i i i i i i i i i i i i i i i						
	Reading Record Holds History Patron Edit History Archived Patron Notes						
	Holds History						
•	Call	Ham Diacod Evoirod/canceled					
TEST PATRON 4610 S BILTMORE LN #101	Title Author Auth	type Barcode • Haced • Status • Capitocontector date					
MADISON WI 53718 608-242-4711 boliwarson@cclc.info	controversial healing factor/ Hickey, Steve, H526v	BKA28 <u>39078072375422</u> 2022-02-11 issued 2022-02-11					
Category: Juvenile (JU) Home Library: Baraboo-	The mask and mirror [sound recording] / Kockermit, Loreena,	2021-04-08 canceled 2022-01-28					
Carnegie Schadde Memorial Public Library							
Check Out							
Details							
Patron Modification Log Messages							
Proxy Borrowing							
Patron Permissions							
Patron Accounting							
Patron Preferences							
History							

ALTERNATE CHECKOUT STEPS

IF your library's policy is to check out the hold to the patron standing in front of you, instead of checking the item out to the patron that placed the hold, you will have to go to record of the patron that placed the hold and cancel that hold.

Malcolm Reynolds and Ivan Vorpatril have a proxy borrowing relationships and Malcolm is picking up a hold for Ivan at the REE library.

		Search Patrons	Search the Catalog	Check Out	Check In		
TEST	TEST	TEST	TEST	TEST	TEST	TEST	TEST
IVAN VORPATRIL (29078017854129)	⇔ New ▼	Edit 🕞 Change Passwo	rd 🖉 Print 🔻 More 🔻	Mute Sounds			
?	Patron alert	as a credit of -39.99.					
TEST PATRON 4610 S BILTMORE LIN #101 MADISON WI 53718 608-242-4711 holiversen@scis.info Category: Adult (AD) Home Library: Reedburg Public Library Check Out	Clear Screen Checking out Enter item bar Specify Due Date:	to IVAN VORPATRIL (29078 code or text: Che	8017854129) ck Out Clear	Search to p Patron n > 05/17/2 Delete Add A Holds w > Bird bra day loar Waiting 3907807	Nace hold for IVAN VORPA otes: 121 SCA "Patron allowed Archive New Note aiting: ins : the intelligence of crow), by Savage, Candace, 1at Reedsburg Public Lit (4547192)	TRIL (29076017854129) Search To H to pick up holds for Malcolm Reyn ws_ravens_magpies_ and jays_/ (Boo prary until 2022-02-03 (barcode	iold ." k, adult, 28
Patron Modification Log	Checked Out (1) Fines & Charges (0.00)	On Hold (10) Circulation	on History			
Messages Provy Borrowing	Checked O	ut					
Patron Permissions	Date due	Title	Date checked out	Check out library	ltem ¢ Call type turn	ber Renew select all none	
Patron Accounting	02/18/2022	<u>JV-Problem #01</u> 39078035361006	02/11/2022	SCA	VR7 REE AN	IF Not Renewable On Hold	1
Lost Items						Renewal due date:	
History					Ovorri	da Panawal Blacks: 🗖 Panaw char	kad itame

Access Malcolm's record and leave the Checkout option as Self

Check out Ivan's hold to Malcolm's record.

MALCOLM REYNOLDS	
(29078013982007)	♦ New +] 🛒 Edit] 🚋 Chance Password] 🖉 Print +] More +] Mule Sounds
TEST PATRON 4610 S BILTMORE LN #101 MODISON WI 53718 603-242-4711 holiversen@scli.nfo Category: Aduit (AD) Home Library: SCLS Headquarters	Clear Screen Checking out to MALCOLM REYNOLDS (29078013982007) for Self Checking out to MALCOLM REYNOLDS (29078013982007) for Self Check Out Specify One Date: Specify One Date: Specify One cloud Dat
Check Out	Checked Out (1) Fines & Charges (0.00) On Hold (11) Circulation History
Details	Checked Out
Patron Modification Log Messages	Date due Title Date checked out library type Call number selectal inone
Proxy Borrowing	03/11/2022 SCA BKA28 741.5973 Sw23s v3 Renewable On Hold
Patron Permissions	Renewal due date
Patron Accounting	
Patron Preferences	
Lost Items	
History	
Patron Delete	

MALCOLM REYNOLDS (29078013982007)	
(25070015502007)	A New • If Edit Description Password Print • More • Mute Sounds
TEST PATRON 4610 5 BILTMORE UN #101 MADISON WI 53718 608-242-4711 holiversen@scis.info Category: Aduit (AD) Home Library: SCLS Headquarters	Clear Screen Checking out to MALCOLM REYNOLDS (29078013982007) for Self There item barcode or text: 39078074547192 Check Out Specify Due Date: Specify Checkout Date: Show
Check Out	Checked Out (1) Fines & Charges (0.00) On Hold (11) Circulation History
Details	Checked Out
Patron Modification Log	
Messages	due Title Date checked Check out them Call Concernance Check out them sets at none
Proxy Borrowing	03/11/2022 SCA BKA28 v3.15973 Sw23s Not Renewable On Hold
Patron Permissions	Reneval due date:
Patron Accounting	
Patron Preferences	
Lost Items	overnoe Reflewal blocks. U reflew checked weins
History	
Patron Delete	
https://scls-sandbox.bibliovation.co	om/cgi-bin/koh/circ/circulation.pl?borrowernumber=920340=checkedout

Block message

TEST	TEST TEST	TEST	TEST	TEST	TEST	TEST TI
MALCOLM REYNOLDS (29078013982007)	💠 New 🔻 📑 Edit 😥 Emer Change Pase	sword 🖉 Print 🔻 More 👻	Mute Sounds			
TEST PATRON TEST PATRON 4610 S BILTMORE LN #101 MADISON WI 53718 Bollversen@scisi.nfo Category.rduit (AD) Home Library. SCLS Headquarters	Cannot check out item E Please resolve the following conditions: The item is on hold and marked as W Reedsburg Public Library). Override Block? Process hold do NOT check o Coverride blocks and c Coverri	ird brains : AITING for IVAN VORPATRIL (29 21 heck out (y)	9078017854129,			
Details Patron Modification Log Messages	Clear Screen Checking out to MALCOLM REYNOLD Enter item barcode or text:	S (29078013982007) for Self	~	Search to place hold for N Patron notes: 04/29/2021 MTH "Hol Malcolm. hjo/sca"	IALCOLM REYNOLDS (29 d Pickup Authorization: I lelete Archive	078013982007) Search To Hold
Proxy Borrowing				04/29/2021 MTH "Umb Add A New Note	orella was left at the library.	hjo/sca"
Patron Permissions	Specify Due Date:			AND A NEW NOLE		
Patron Accounting	Remember for Session:					
Patron Preferences	Specify Checkout Date:					
Lost Items						
History	Checked Out (1) Fines & Charges (0)	0) On Hold (11) Circulation	History			
Patron Delete	Checked Out (1) Filles & Charges (0.)	or noid (1) Circulation	Thistory			
	Checked Out					
	Date 🔺 Title	•	Date checked out	Check out library	Item	ber Renew select all I none

Click override Block checkbox and click the Override blocks and checkout button.

Item is checked out to Malcolm's record

MALCOLM REYNOLDS (29078013982007) (29078013982007) TEST PATRON 46105 SILTMORE LN #101 MADISON WI 53718 608-242-471 holiversel@sds.info Category: Adult (AD) Home Uberay: SCLS Headquarters	♦ New Clear Screen Checking out to MALCOLM REYNOLDS (29078013982007) for Self Enter item barcode or text: Specify Due Date: Specify Check Out: Specify Check Date: Specify Check Date: Show Second Date: Specify Check	<u>To Hold</u> To pick up holds for
Check Out	Checked Out (2) Fines & Charges (0.00) On Hold (11) Circulation History	
Details	Checked Out	
Patron Modification Log Messages	Date due Title Date checked Check out Item Call Renew	none
Proxy Borrowing	03/11/2022 SCA BKA28 598.864 SAVAG Not Rem	ewable On Hold
Patron Permissions	20/11/2022 Surger Thing Lepling the brach / by Durat Jeeb 2007062206621 02/11/2022 SCA PKA29 741.5973 SW238 Net Part	awable On Hold
Patron Accounting		
Patron Preferences	Reneval	due date:
Lost Items		and the sheet of the second
History	Overnde Renewal Blocks: U R	snew checked item:
Patron Delete		

Ivan's hold request is not filled, the hold request is still on Ivan's On Hold list with a Barcode of "Item is waiting" and a "Reshelve after" date. (Columns related to hold expiration date were re-labeled "Reshelve after" in 7.02.)

TEST PATRON 4610 S BILTMORE LN #101 Malioson wi 59718 608-242-4711 holiversen@sclainfo doubler.libray: Reedsburg Public Libray: Reedsburg Public Libray: Check Out Details Patron Modification Log Messages	Patron ale ▲ The patron Clear Screen Checking ou Enter item bar Specify Due Dat Specify Checkoo Show Checked Our	ert: h has a credit of -39.99. It to IVAN VORPATRIL (29 code or text: Remember for Session: (1) Fines & Charges (0.0	07801785412 Check Out] Dear 0) On Hole	9) for Self	ion History	Searn Pat	ch to place tron note 5/17/2021 Archive Add A Nev	hold for IVAN V S: SCA "Patron all v Note	ORPATRIL (2907	7801785412 9 holds for l	9) <mark>Search To Hold</mark> Malcolm Reynold] s.* Delete
Patron Permissions	Patron cu	urrent holds	Item	Call		Pickup			Wait	Suspend	Resume	
Patron Accounting	date 🏛	Title \$	Туре 🇳	Number *	Barcode 🔹	At	 Notes 	Priority 🔹	Expires	(all: 🗆)	On	Delete? •
Patron Preferences	02/08/2022	JV - Test Item 06.				Public Library		2		0		No 🗸
Lost Items	02/04/2022	<u>The future falls /</u> , by Huff, Tanya				Reedsburg Public Library		1				No 🗸
Patron Delete	01/26/2022	Echo : an elephant to remember /				Reedsburg Public Library		1				No 🗸
	01/26/2022	Home alone 2 : lost in New York /				Reedsburg Public Library		2				No 🗸
	01/25/2022	100 easy checkmates /, by Evans, Larry,				Reedsburg Public Library		4		D		No 🗸
	04/14/2021	<u>The midnight library [text</u> (<u>large print)] /</u> , by Haig, Matt,				Reedsburg Public Library		68		O		No 🗸
	04/09/2021	Bird brains : the intelligence of crows, ravens, magpies, and jays /, by Savage, Candace,			Item is waiting	Reedsburg Public Library	,	1	02/03/2022			No 🗸
	12/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.				SCLS Headquarters		2				No 🗸
	12/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.				SCLS Headquarters	;	3		0		No 🗸
	12/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.				SCLS Headquarters		4				No ¥
	Save Change	s										

Item is not registered in Ivan's Holds History as "issued".

TEST	TEST	TEST	TES	т	TEST TEST		TEST	TEST	TEST
Detail									
MARC	Place a hol	d on Bird brain	s : the intellig	ence o	f crows, ravens, magpies, an	d jays /			
ISBD									
Edit Items	Select patron	n for new hold							
Item Statuses	Refresh view								
Holds	Existing holds	Search Clear							
Checkout History									
Modification Log	Priority 👻	Patron 🗢 Note	s 🗢 Date	٠	Pick up Library	Details 🕈	Suspended	Waiting/ Resume	
	1 • !		2021-04-	09 11:23:24	Item being transferred to Reedsburg Public Librar	y No Barcode		Waiting since 01/26/2022	
	Update							·	

TOU WIII HAVE TO CALLET IVALLS HOLD OF THE REFIT THAT IVIALOUTH CHECKED OUT TO THIS	You will have to canc	el Ivan's hold	on the item	that Malcolm	checked out for him.
---	-----------------------	----------------	-------------	--------------	----------------------

atron cl	urrent noids										
Hold date	Title 🔹	Item Type	Call Number *	Barcode 🔹	Pickup At	Notes	Priority 🔹	Wait Expires	Suspend (all:)	Resume On	Delete? •
2/08/2022	JV - Test Item 06.				Reedsburg Public Library		2		0		No 🗸
2/04/2022	The future falls /, by Huff, Tanya				Reedsburg Public Library		1				No 🗸
1/26/2022	Echo : an elephant to remember /				Reedsburg Public Library		1				No 🗸
1/26/2022	Home alone 2 : lost in New York /				Reedsburg Public Library		2				No 🗸
01/25/2022	100 easy checkmates /, by Evans, Larry,				Reedsburg Public Library		4				No 🗸
04/14/2021	The midnight library [text (large_print)] /, by Haig, Matt,				Reedsburg Public Library		68		0		No 🗸
04/09/2021	Bird brains : the intelligence of crows, ravens, magpies, and jays <u>/</u> , by Savage, Candace,	2		ltem is waiting	Reedsburg Public Library		1	02/03/2022			Yes 🗸
2/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.	2			SCLS Headquarters		2			D	No 🗸
2/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.	2			SCLS Headquarters		3				No 🗸
2/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.	2			SCLS Headquarters		4		0		No 🗸

Place a hold on Bird brains : the intelligence of crows, ravens, magpies, and jays /

Edit Items
Select patron for new hold

Item Statuses Refresh view

Detail

Checkout History Modification Log

MODIFYING THE PROXY BORROWING RELATIONSHIP

TEST	TEST	TEST	TEST	TES	-	T TEST	T TEST TEST	T TEST TEST TEST
ANNIE EXPIRED								
(29078007303608)	⇔ New ▼ B E	Edit See Change Password	Print - More	•				
	ANNIE EXPIREI	D can borrow material	s for the followi	ng peop	le	le	le	le
	Name	Date Expires	Active	_				
7	HAROLD EXPIRED		🖲 🔍 Yes 🔿 No 🛛 Sa	ve <u>Delete</u>				
•								
TEST PATRON	The following p	eople can borrow mat	erials for ANNIE					
MADISON WI 53718	Name	Date Expires	Active			Ē	7	Ī
608-242-4711				Delete				
Category: Juvenile (JU)	TIAROED EXTIRED							
Home Library: Baraboo-								
Carnegie Schadde Memorial Public Library								
memorian abite cloreny								
Check Out								
Details								
Patron Modification Log								
Messages								
Proxy Borrowing								
Patron Permissions								
Patron Accounting								

A proxy borrowing relationship can be modified at any point to

- Add, change or remove an expiration date; using the Calendar widget is the most efficient way to change this field.
- Make the relationship inactive or active by clicking the radio buttons.
- Delete the relationship by clicking the Delete link.