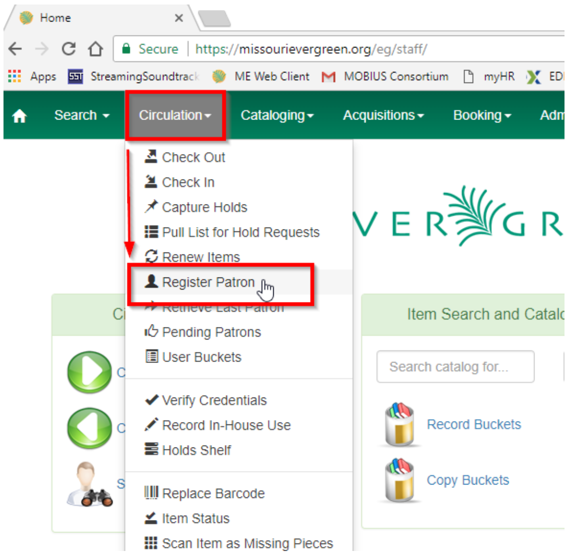
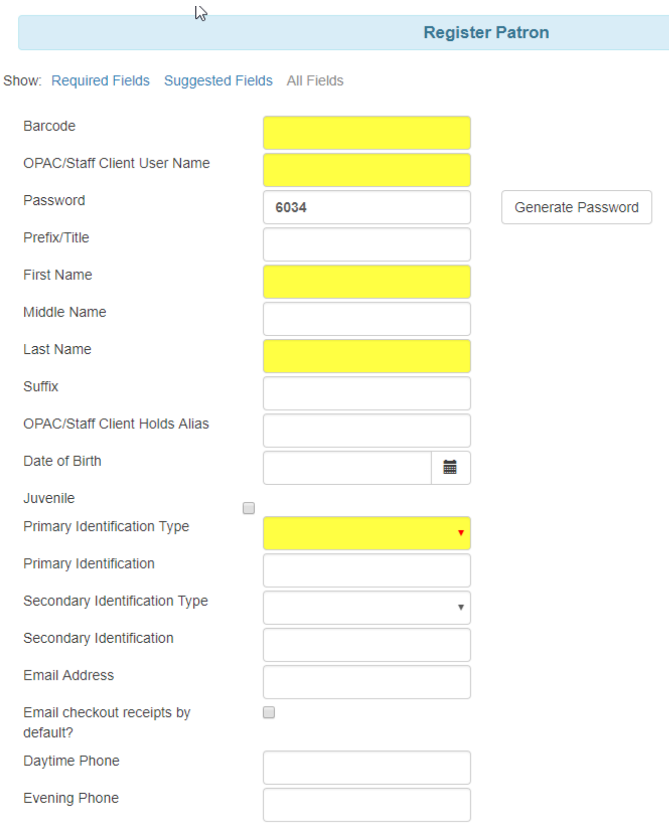
Information from Missouri Evergreen : http://libraries.missourievergreen.org/content/circulation

Registering New Patrons

To register a new patron, you can use the “Register New Patron” choice from the Circulation text menu at the top, use the keyboard command Shift+F1, choose “Patron Registration” from the button bar, or choose “Register Patron(s)” from the menu on the main page.



On the registration form that comes up, all fields that are required, either by Evergreen or by your library system/branch, are highlighted yellow and the boxes contain a caution symbol. **Patron**
Record Fields (Required Fields have an * below and show up in yellow in the staff client.)



Register Patron

Show: Required Fields Suggested Fields All Fields

Barcode
OPAC/Staff Client User Name
Password 6034 Generate Password
Prefix/Title
First Name
Middle Name
Last Name
Suffix
OPAC/Staff Client Holds Alias
Date of Birth
Juvenile
Primary Identification Type
Primary Identification
Secondary Identification Type
Secondary Identification
Email Address
Email checkout receipts by default?
Daytime Phone
Evening Phone

Date of Birth: Patron's date of birth, entered in the format mm/dd/yyyy

Juvenile: Check if you want to indicate that the patron is a juvenile.

***Primary Identification Type**: Use this box for the tan cards (Adult 18+) (not highlighted)

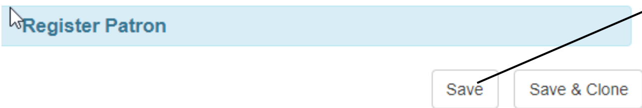
***Secondary Identification Type**: Use this box for parent/guardian information: Pink and green cards. (not highlighted)

Email checkout receipts by default?: The user can choose to have checkout receipts emailed rather than printed. The user must choose this setting prior to checking out items.

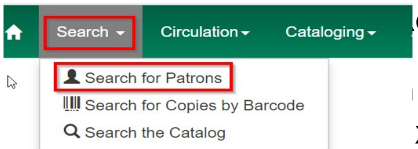
NEW NEW NEW
Statistical Categories
At bottom of page: Until it goes away place the following information in the boxes. MS and NR will change if needed:
Demographic - Adult
Funding - Resident
Residency – Resident
(Even if it is a nonresident card or a child) You will NOT be able to save the form unless this information is entered.

Finishing Registration

After you have completed the patron registration form, click on the Save button. If the screen refreshes and brings up a blank form, you have successfully registered the patron. If it does not, there is some required information that is missing from the form.

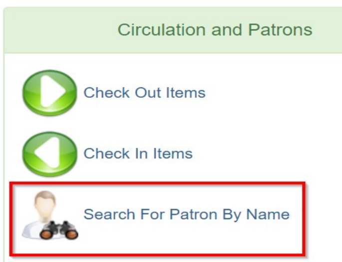


Searching for and Viewing Patron Records



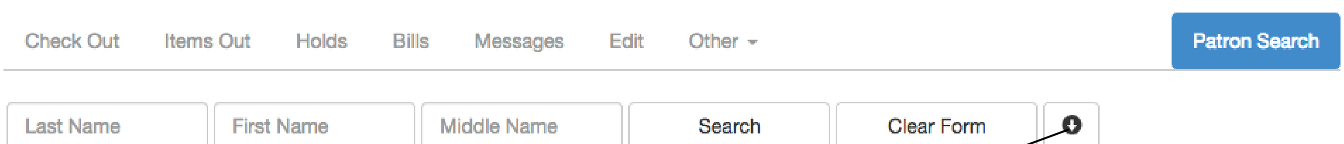
ecords:

rcode/card, you can use the Check Out option from the main xt menu. If the patron does not, use the “Search for Patrons” xt menu or choose “Search for Patron by Name” on the main

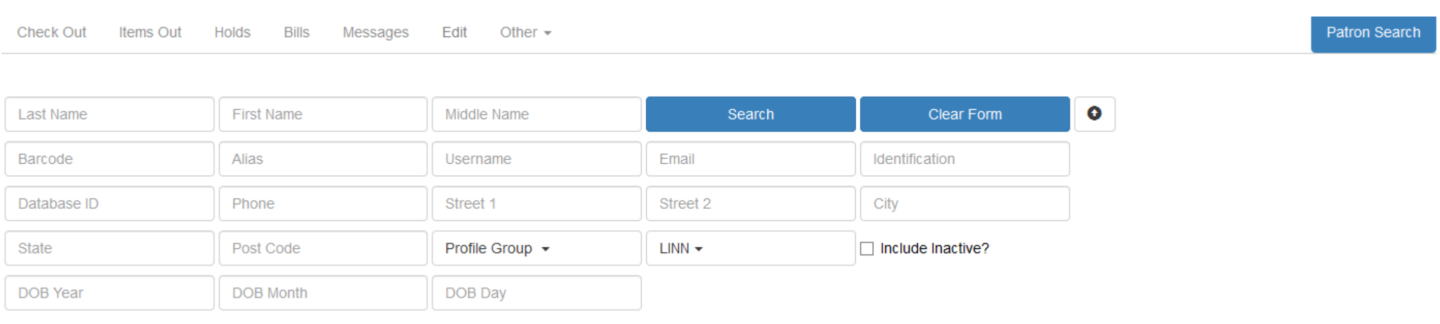


Patron Search screen will display. It will contain options to search on the following fields:

- Last Name
- First Name
- Middle Name



Next to the *Clear Form* button there is a button with an arrow pointing down that will display search fields.



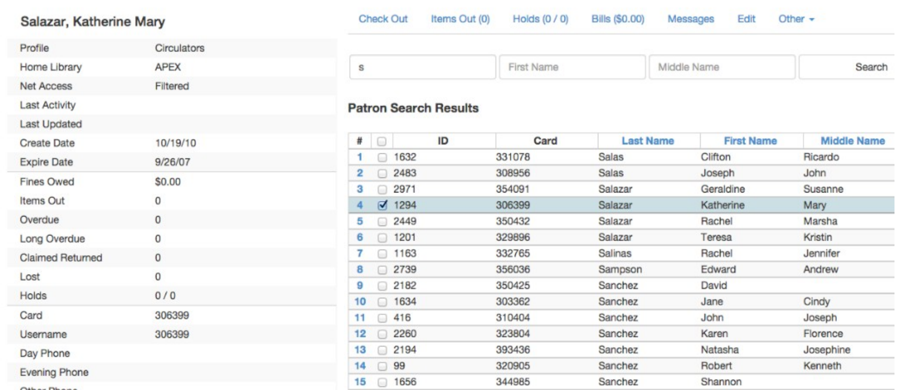
To include patrons marked “inactive”, click on the *Include Inactive?* checkbox.

Some search tips:

- Search one field or combine fields for more precise results.
- Truncate search terms for more search results.
- Search ignores punctuation such as diacritics, apostrophes, hyphens and commas.
- Searching by Date of Birth: Year searches are "contains" searches. E.g. year "15" matches 2015, 1915, 1599, etc. For exact matches use the full 4-digit year. Day and month values are exact matches. E.g. month "1" (or "01") matches January, "12" matches December.

Viewing Patron Records

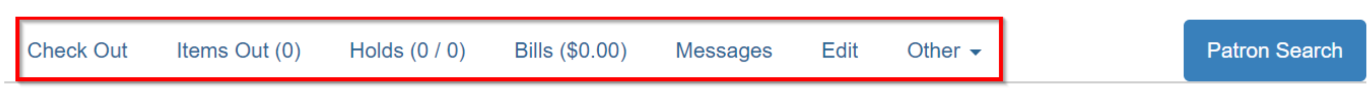
Once you have located the desired patron, click on the entry row for this patron in the results screen. A summary for this patron will display on the left-hand side.



The *Patron Search* button on the upper right may be used to resume searching for patrons.

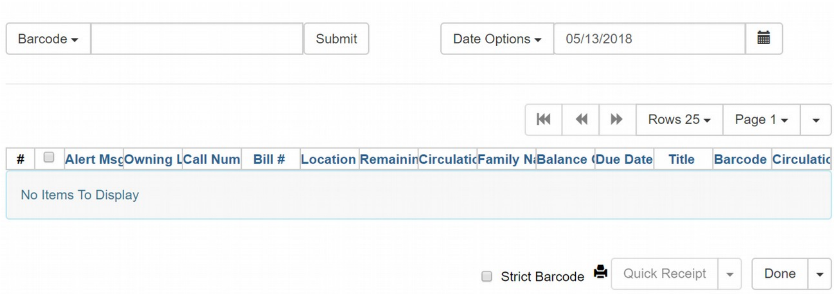
Elements of the Patron Record

You are presented with a set of action buttons across the top, which allow you to check out items to the patron, view items the patron has checked out, view and place holds, view and create bills, edit the patron record, add or view system messages about the patron, and various other functions.



Check Out

The Check Out screen is where you check out items. More will be covered on this function in the documentation on Checking out and Renewing.



Items Out

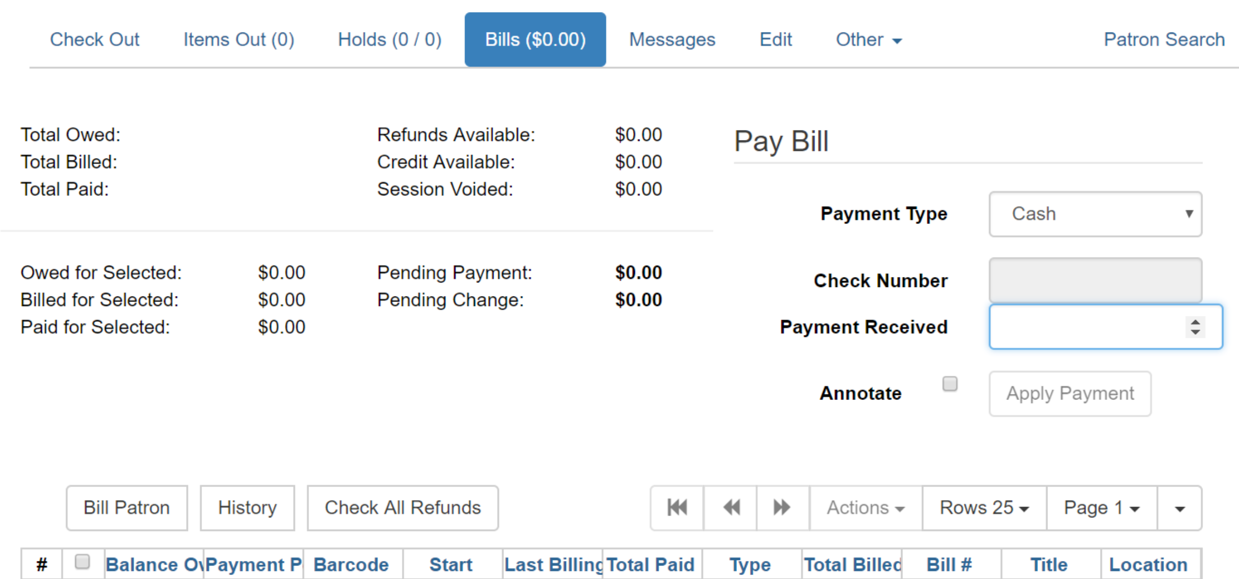
The Items Out button shows all items a patron has checked out, as well as items which have been marked Lost while checked out to the patron, long overdues, claims returned items, and unpaid billings.

Holds

The Holds button allows you to view the holds a patron has and their status. You can also place holds for a patron here.

Bills

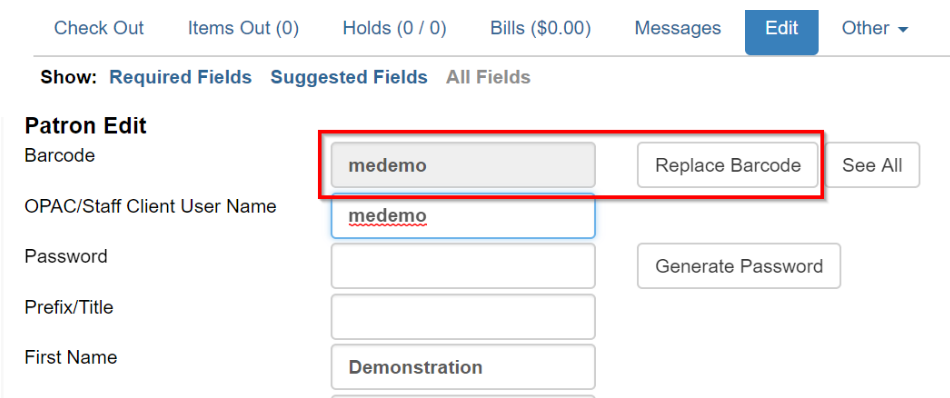
The Bills button brings up the billing screen, which shows how much the patron owes, and for what. Staff-applied bills can be added here, and marking payments is also done on this screen.



Edit

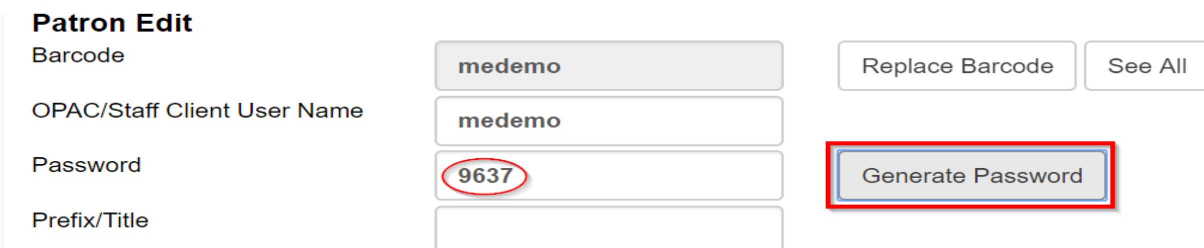
The Edit button shows all fields in the patron record and allows you to edit most of them.

Replacing Barcodes: When a patron needs a new library card, you come to the Edit section to assign the replacement barcode. Click on the Replace Barcode button, then scan in the new barcode. Note that doing this does not automatically change the OPAC User Name to the new barcode. You must highlight the barcode in that field and scan the new one there, too. Be sure to click on the Save button when finished.

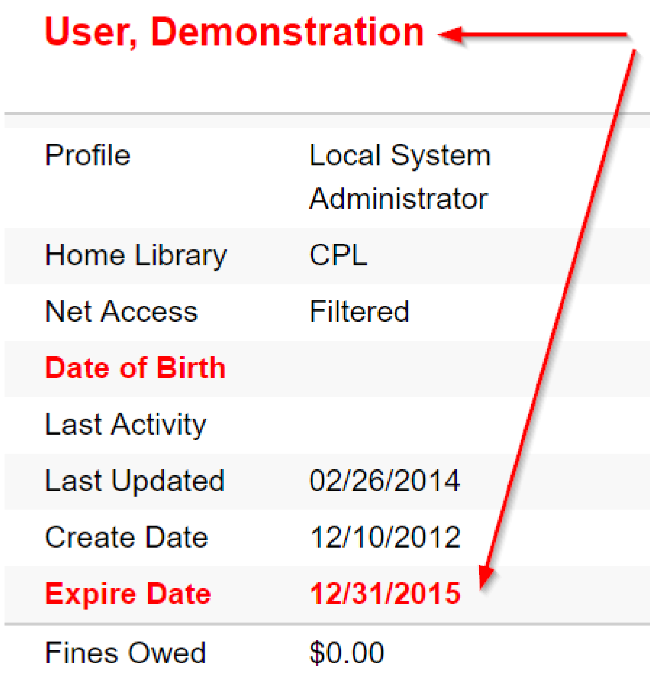


If you want to see any past barcodes the patron has had, click on the See All button next to the Replace Barcode button.

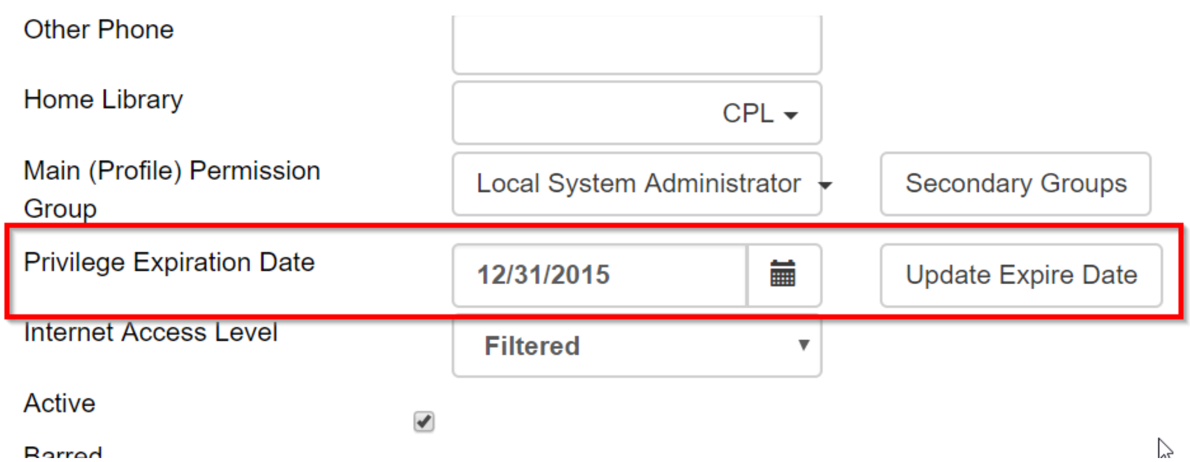
Resetting Patron Password: A patron's password may be reset from the OPAC My Account or through the staff client. To reset the password in the staff client, type in the 4 numbers of the patron's year of birth. Be sure to click on the Save button when finished.



Renewing Cards/Accounts: When a patron card is expired, their name changes color and the reason for the color change is highlighted in the account summery.

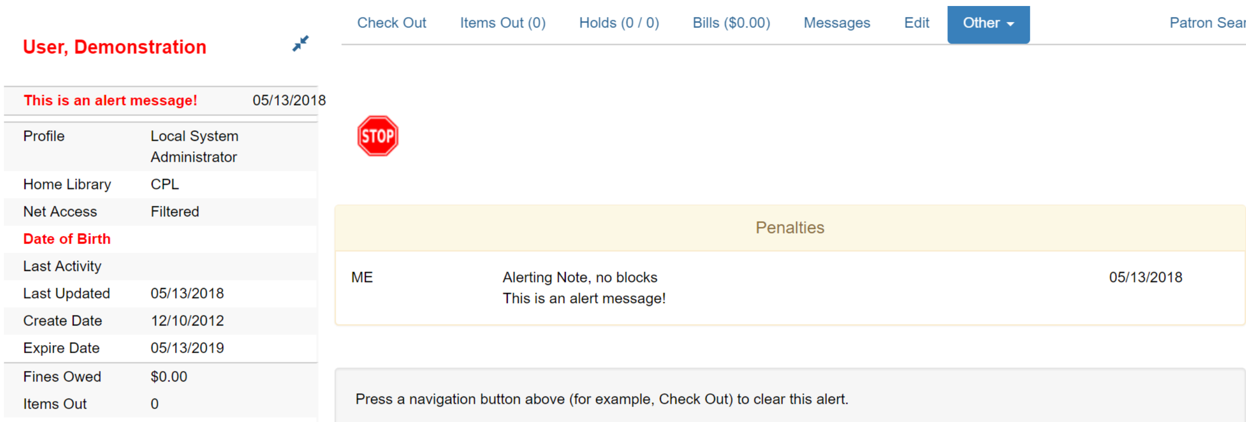


Always check the patron’s name, Alt ID, and address before renewing the account—Alt ID must be shown by the patron. To update the expiration date, click on the Edit button. Next to the expiration date is a button, “Update Expire Date.” Clicking this button will reset the expiration date according to the patron’s profile permission. Be sure to click on Save before exiting.



Messages

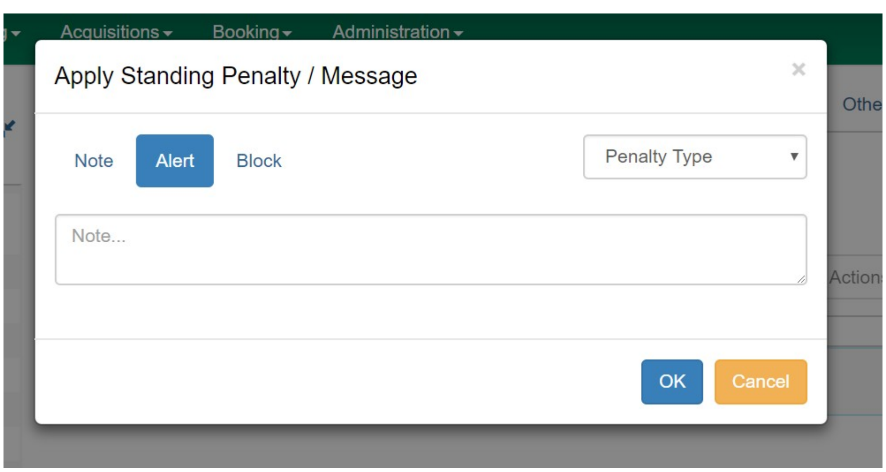
The Messages button allows staff to apply alert messages, which will pop up with a red stop sign whenever the patron record is opened.



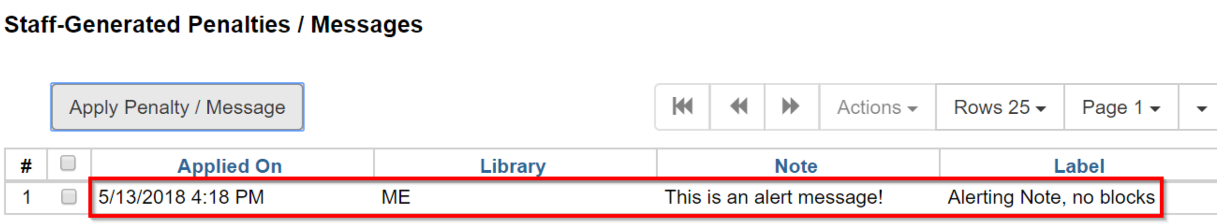
These alerts should contain information it is important for any staff dealing with the patron to see right away. Staff can also apply Notes, which will not pop up like the alert messages, and those will be covered in the next section.

To set up an alert message, click on the “Apply Standing Penalty/Message” under the Staff-Generated Penalties/Messages heading.

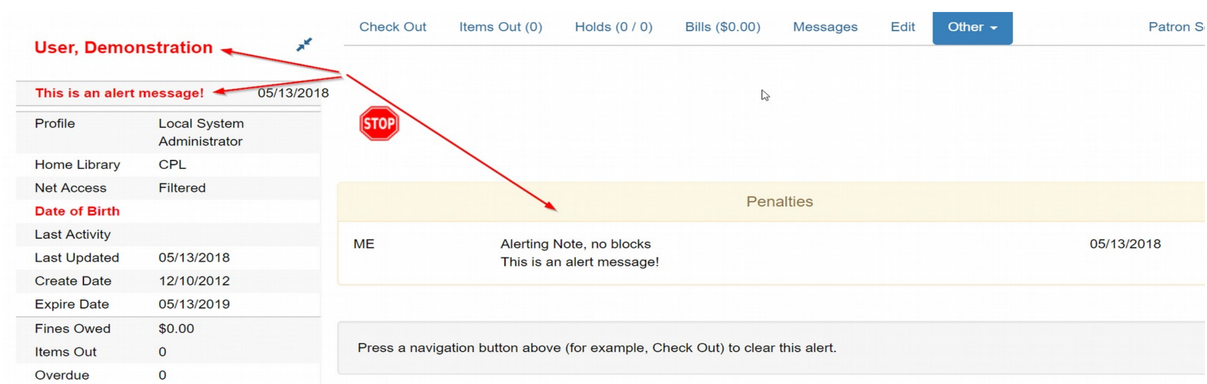
A new pop-up window will appear. Click on the middle choice, Alert, to set the alert message. The Note choice will add a note but not an alert and the Block choice will block the patron account.



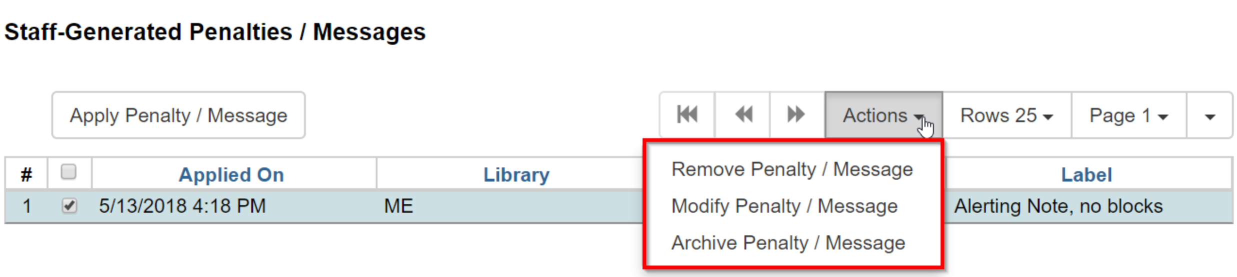
Type in the message for the alert in the text box, then click the Apply button. The message will then become visible in the Staff-Generated Penalties/Messages area.



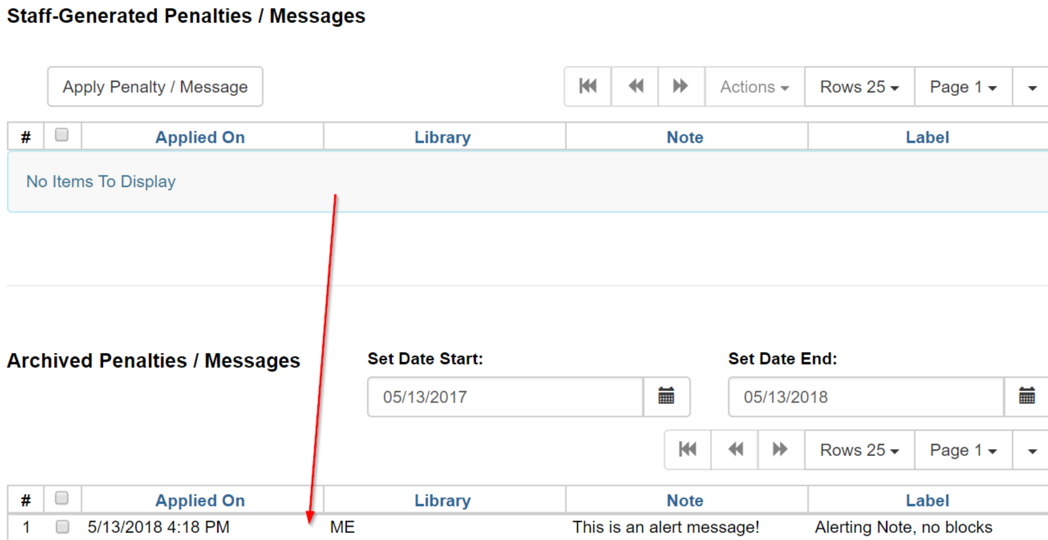
If you refresh the page, you will see that the patron name changes to red, indicating there is an alert and the alert message appears under the patron name.



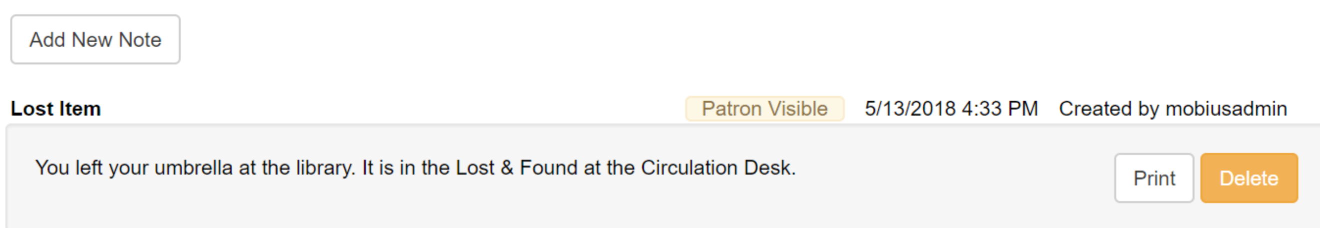
Alerts can be removed in two ways. If you want to completely get rid of the alert, you would go to Actions for these Penalties/Messages and choose Remove Penalty/Message. You can also Archive the message, so that there is still a record of it, but it is no longer applied to the patron record. To do so, choose Archive Penalty/Message from the Actions for these Penalties/Messages menu.



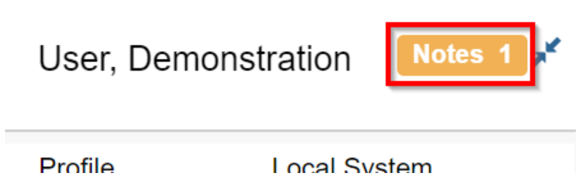
In the lower section, Archived Penalties/Messages, click on Retrieve Archived Penalties, which will drop the archived message into the lower section.



When finished, click Add Note. The note window will close, and the note will now be visible in the notes window. The option to delete or print the note will also appear to the right.



Notes do not show when opening the patron record like alerts do. However, a button will show up next to the patron's name on the upper left of the patron record.



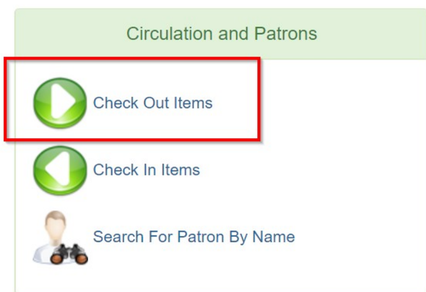
If you click on this "Notes #" message, it will take you to the note.

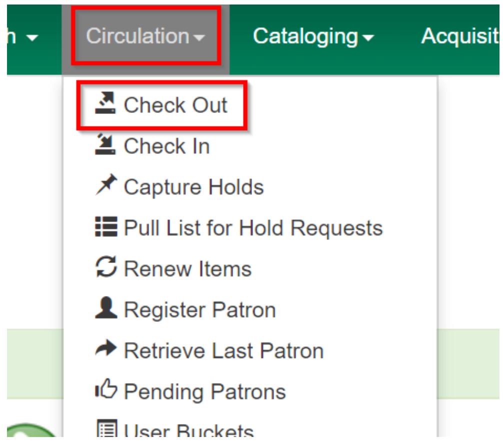
Double-clicking on the note pops open further information about the note, including the message.

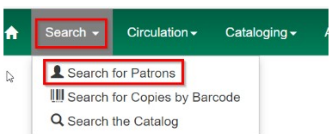
Checking Out and Renewing

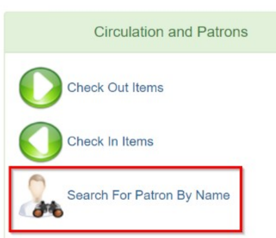
Checking Copies Out

To check out items to a patron, you first must open the patron record, either using the Check Out button if the patron has their barcode/card with them, or by conducting a Patron Search.





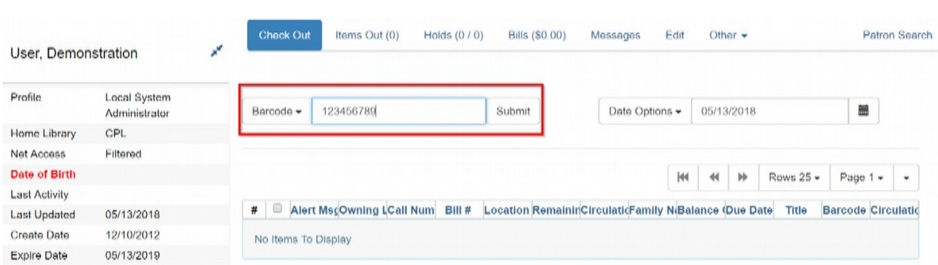




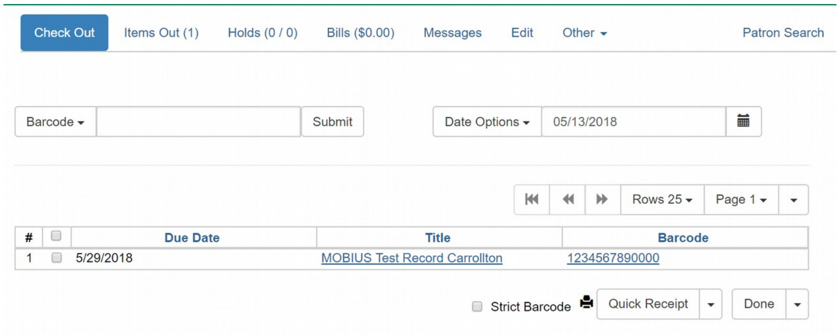
Regular Items

If not already highlighted, choose the Check Out button in the patron account.

1. Scan or enter the item barcode (click Submit if entering the barcode manually).



2. After you scan the barcode(s) of the item(s), they will appear in the box below the text box, along with the due date(s).



3. When you have scanned all the items, click Done in the bottom right corner. The menu on the Done button gives options for No Receipt, Print Receipt, and if the patron has set it up in advance, Email Receipt.

Due Dates

Circulation periods are pre-set. When items are checked out, due dates are automatically calculated and inserted into circulation records if the **Specific Due Date** (Vacation) checkbox is not selected on the Check Out screen. The **Specific Due Date** (Vacation) checkbox allows you to set a different due date to override the pre-set loan period.

Before you scan the item, select the **Specific Due Date** checkbox. Enter the date in yyyy-mm-dd format. This date applies to all items until you change the date, de-select the **Specific Due Date** checkbox, or quit the patron record.

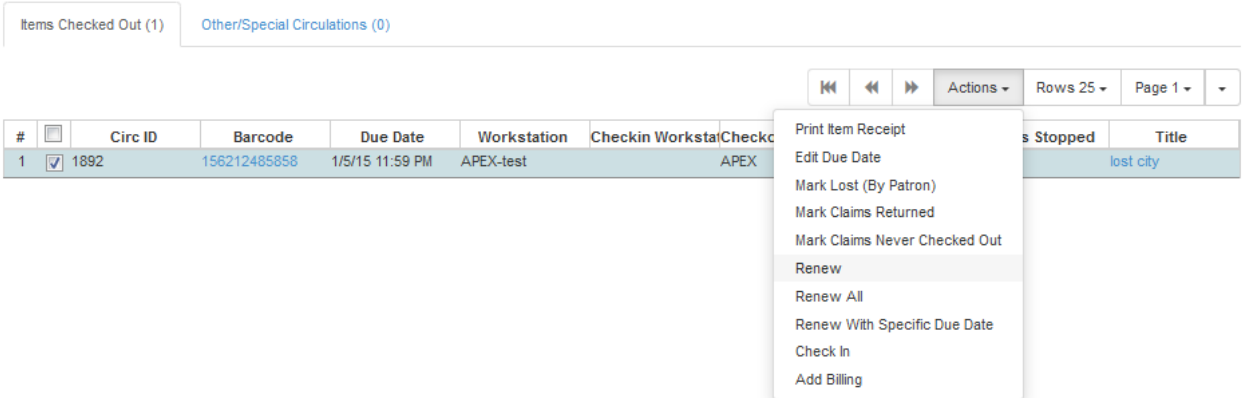
Renewing Items

You can renew items from either the patron record or from the Renew Item screen.

Patron Record

To renew items from the patron record:

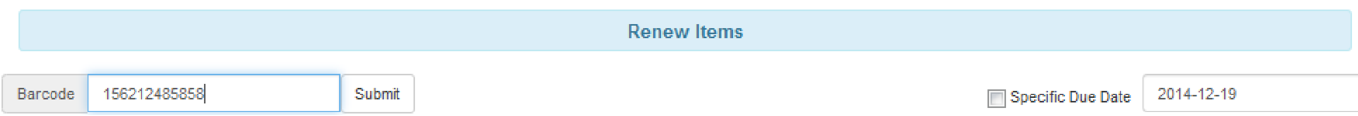
1. Go to the Items Out tab in the patron’s record.
2. Highlight the item(s) to renew and choose Renew (or Renew All to renew all items the patron has checked out) from the Actions menu. If you want to specify the due date, choose Renew with Specific Due Date. You will be prompted to select a due date. Click “Apply” when finished.



3. A pop-up window will open, asking if you are sure you want to renew the item. Click OK and the screen will refresh with the new item due date.
4. To print a receipt: check the box between # and Circ ID so that all items are selected, go to actions and select "Print Item Receipt".

Renew Item Screen (Renew by Item Barcode)

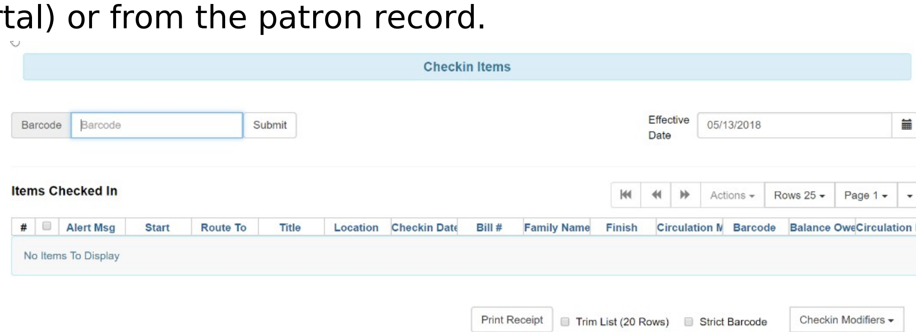
1. To renew items by barcode, select **Circulation** → **Renew Items**.
2. Scan or manually enter the item barcode.



If you want to specify the due date, click**Specific Due Date**and enter a new due date in yyyy-mm-dd format.

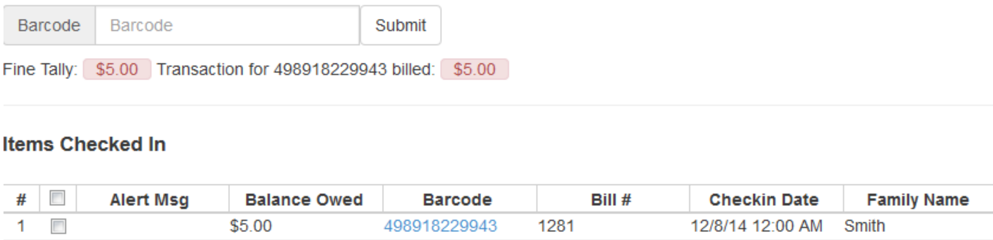
Checking In and Associated Functions

You can check items in from either the Check In screen (Circulation → Check In or Check In Items link on portal) or from the patron record.



Check In Screen

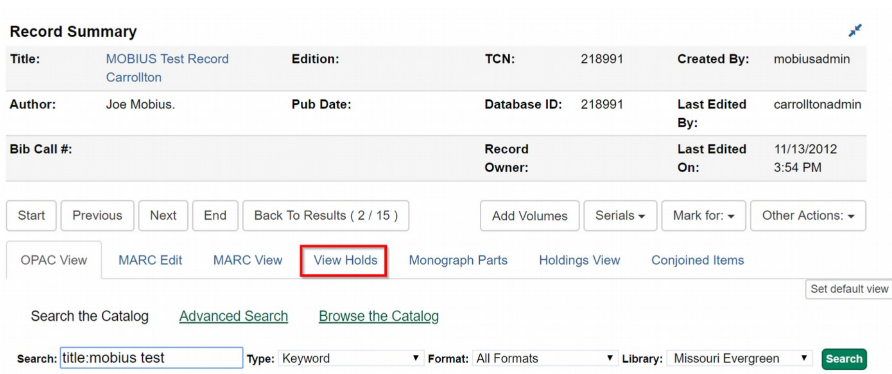
Scan item barcode or enter manually and click **Submit**.
If there is an overdue fine associated with the check-in, an alert will appear at the top of the screen with a fine tally for the current check-in session. To immediately handle the fine payment, click the alert to jump to the patron's bill record.



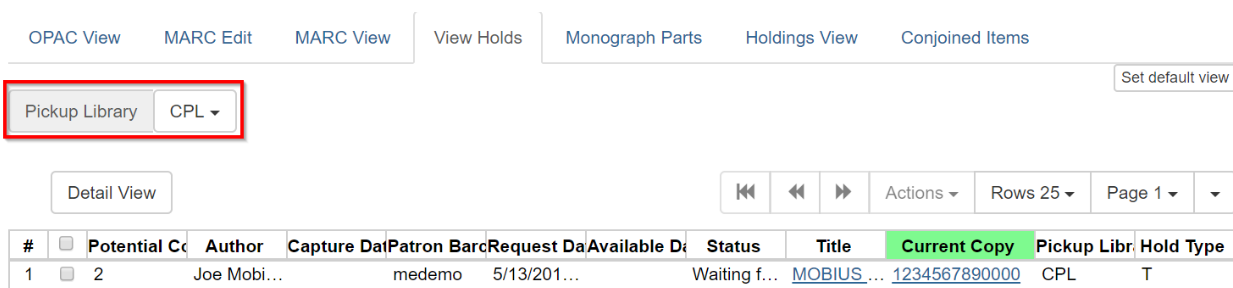
1. If the check-in is an item that can fill a hold, a pop-up box will appear with patron contact information or routing information for the hold.
    a. For APL holds: put item through sorter or use sorter scanner to generate hold slip.
    b. For other libraries: Print out the transit slip and place the item in the proper resource sharing bag.

Viewing Holds

To view a list of holds on a particular bib record, choose View Holds from the tab menu at the top of the record.



The holds view shows the pickup library taken from the workstation location, which can be changed to the consortium level, if desired.

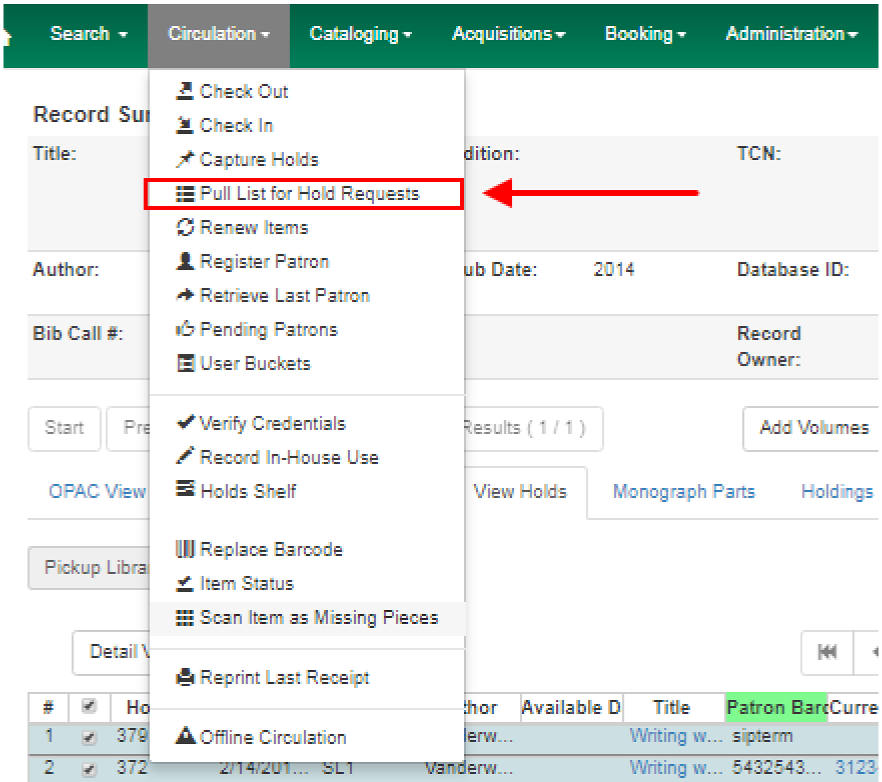


If a copy has been targeted, the barcode will appear in the Current Copy column, and “No Copy” will appear if no copy has been targeted. “No Copy” just means that there is not, currently, an available copy, not that there is no copy in the system.

If an item has been captured, the date it was captured appears in the Capture Date column. If it has been captured, arrived at its destination, and placed on the hold shelf, the date/time will be shown in the Available Date column.

Pulling Holds

1. To retrieve your *Holds Pull List*, select *Circulation* → *Pull List for Hold Requests*.



2. The *Holds Pull List* is displayed.