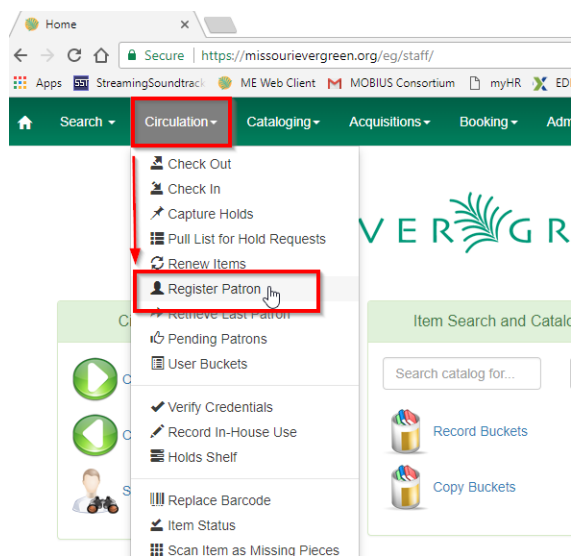


Information from Missouri Evergreen : <http://libraries.missourievergreen.org/content/circulation>

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	<input type="text"/>	
OPAC/Staff Client User Name	<input type="text"/>	
Password	<input type="text" value="6034"/>	<input type="button" value="Generate Password"/>
Prefix/Title	<input type="text"/>	
First Name	<input type="text"/>	
Middle Name	<input type="text"/>	
Last Name	<input type="text"/>	
Suffix	<input type="text"/>	
OPAC/Staff Client Holds Alias	<input type="text"/>	
Date of Birth	<input type="text"/>	<input type="button" value="Calendar"/>
Juvenile	<input type="checkbox"/>	
Primary Identification Type	<input type="text"/>	
Primary Identification	<input type="text"/>	
Secondary Identification Type	<input type="text"/>	
Secondary Identification	<input type="text"/>	
Email Address	<input type="text"/>	
Email checkout receipts by default?	<input type="checkbox"/>	
Daytime Phone	<input type="text"/>	
Evening Phone	<input type="text"/>	

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

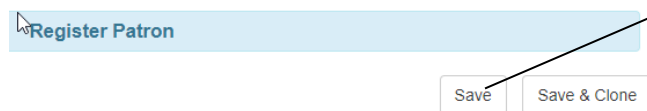
Funding - Resident

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

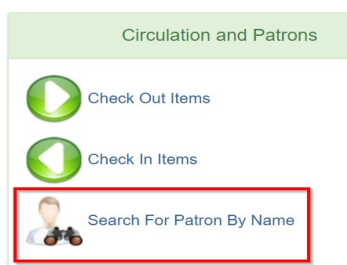
After you have completed the patron registration form, click on the **Save** button. If the screen refreshes and brings up a blank form, you have successfully registered the patron. If it does not, there is some required information that is missing from the form.



Searching for and Viewing Patron Records



barcode/card, you can use the Check Out option from the main next menu. If the patron does not, use the “Search for Patrons” next 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.

Salazar, Katherine Mary

Check Out Items Out (0) Holds (0 / 0) Bills (\$0.00) Messages Edit Other ▾

Profile Circulators
Home Library APEX
Net Access Filtered
Last Activity
Last Updated
Create Date 10/19/10
Expire Date 9/26/07
Fines Owed \$0.00
Items Out 0
Overdue 0
Long Overdue 0
Claimed Returned 0
Lost 0
Holds 0 / 0
Card 306399
Username 306399
Day Phone
Evening Phone

Patron Search Results

#	<input type="checkbox"/>	ID	Card	Last Name	First Name	Middle Name
1	<input type="checkbox"/>	1632	331078	Salas	Clifton	Ricardo
2	<input type="checkbox"/>	2483	308956	Salas	Joseph	John
3	<input type="checkbox"/>	2971	354091	Salazar	Geraldine	Susanne
4	<input checked="" type="checkbox"/>	1294	306399	Salazar	Katherine	Mary
5	<input type="checkbox"/>	2449	350432	Salazar	Rachel	Marsha
6	<input type="checkbox"/>	1201	329896	Salazar	Teresa	Kristin
7	<input type="checkbox"/>	1163	332765	Salinas	Rachel	Jennifer
8	<input type="checkbox"/>	2739	356036	Sampson	Edward	Andrew
9	<input type="checkbox"/>	2182	350425	Sanchez	David	
10	<input type="checkbox"/>	1634	303362	Sanchez	Jane	Cindy
11	<input type="checkbox"/>	416	310404	Sanchez	John	Joseph
12	<input type="checkbox"/>	2260	323804	Sanchez	Karen	Florence
13	<input type="checkbox"/>	2194	393436	Sanchez	Natasha	Josephine
14	<input type="checkbox"/>	99	320905	Sanchez	Robert	Kenneth
15	<input type="checkbox"/>	1656	344985	Sanchez	Shannon	

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 Items Out (0) Holds (0 / 0) Bills (\$0.00) Messages Edit Other ▾ Patron Search

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.

Barcode Submit

Date Options

Navigation: Rows 25 Page 1

#	<input type="checkbox"/>	Alert Msc	Owning L	Call Num	Bill #	Location	Remaini	Circulati	Family N	Balance	Due Date	Title	Barcode	Circulati
No Items To Display														

Strict Barcode Quick Receipt Done

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.

Check Out Items Out (0) Holds (0 / 0) **Bills (\$0.00)** Messages Edit Other Patron Search

Total Owed:		Refunds Available:	\$0.00	Pay Bill
Total Billed:		Credit Available:	\$0.00	
Total Paid:		Session Voided:	\$0.00	

Owed for Selected:	\$0.00	Pending Payment:	\$0.00	Payment Type	Cash <input type="text"/>
Billed for Selected:	\$0.00	Pending Change:	\$0.00	Check Number	<input type="text"/>
Paid for Selected:	\$0.00			Payment Received	<input type="text"/>

Annotate

Bill Patron History Check All Refunds

Navigation: Actions Rows 25 Page 1

#	<input type="checkbox"/>	Balance O	Payment P	Barcode	Start	Last Billing	Total Paid	Type	Total Billed	Bill #	Title	Location
---	--------------------------	-----------	-----------	---------	-------	--------------	------------	------	--------------	--------	-------	----------

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.

Check Out Items Out (0) Holds (0 / 0) Bills (\$0.00) Messages **Edit** Other ▾

Show: [Required Fields](#) [Suggested Fields](#) [All Fields](#)

Patron Edit

Barcode	<input type="text" value="medemo"/>	<input type="button" value="Replace Barcode"/>	<input type="button" value="See All"/>
OPAC/Staff Client User Name	<input type="text" value="medemo"/>		
Password	<input type="text"/>	<input type="button" value="Generate Password"/>	
Prefix/Title	<input type="text"/>		
First Name	<input type="text" value="Demonstration"/>		

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.

Patron Edit

Barcode	<input type="text" value="medemo"/>	<input type="button" value="Replace Barcode"/>	<input type="button" value="See All"/>
OPAC/Staff Client User Name	<input type="text" value="medemo"/>		
Password	<input type="text" value="9637"/>	<input type="button" value="Generate Password"/>	
Prefix/Title	<input type="text"/>		

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 summary.

User, Demonstration

Profile	Local System Administrator
Home Library	CPL
Net Access	Filtered
Date of Birth	
Last Activity	
Last Updated	02/26/2014
Create Date	12/10/2012
Expire Date	12/31/2015
Fines Owed	\$0.00

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.

Other Phone	<input type="text"/>
Home Library	<input type="text" value="CPL"/>
Main (Profile) Permission Group	<input type="text" value="Local System Administrator"/> <input type="button" value="Secondary Groups"/>
Privilege Expiration Date	<input type="text" value="12/31/2015"/> <input type="button" value="Update Expire Date"/>
Internet Access Level	<input type="text" value="Filtered"/>
Active	<input checked="" type="checkbox"/>
Barred	<input type="checkbox"/>

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.

User, Demonstration

Check Out Items Out (0) Holds (0 / 0) Bills (\$0.00) Messages Edit Other ▾ Patron Search

This is an alert message! 05/13/2018

Profile	Local System Administrator
Home Library	CPL
Net Access	Filtered
Date of Birth	
Last Activity	
Last Updated	05/13/2018
Create Date	12/10/2012
Expire Date	05/13/2019
Fines Owed	\$0.00
Items Out	0

Penalties

ME	Alerting Note, no blocks This is an alert message!	05/13/2018
----	---	------------

Press a navigation button above (for example, Check Out) to clear this alert.

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.

Check Out Items Out (0) Holds (0 / 0) Bills (\$0.00) **Messages** Edit Other ▾

Staff-Generated Penalties / Messages

Apply Penalty / Message

⏪ ⏩ Actions ▾ R

#	Applied On	Library	Note
No Items To Display			

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.

Acquisitions ▾ Booking ▾ Administration ▾

Apply Standing Penalty / Message

Note **Alert** Block

Penalty Type ▾

Note...

OK Cancel

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.

Staff-Generated Penalties / Messages

#	Applied On	Library	Note	Label
1	5/13/2018 4:18 PM	ME	This is an alert message!	Alerting Note, no blocks

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.

The screenshot shows a patron record for 'User, Demonstration'. The patron name is highlighted in red. A red arrow points from the name to a red STOP sign icon. Another red arrow points from the STOP sign to a message box that says 'This is an alert message!' with the date '05/13/2018'. Below the message box, there is a 'Penalties' section with a table showing the alert message: 'Alerting Note, no blocks' with the date '05/13/2018'. A note at the bottom says 'Press a navigation button above (for example, Check Out) to clear this alert.'

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.

Staff-Generated Penalties / Messages

#	Applied On	Library	Label
1	5/13/2018 4:18 PM	ME	Alerting Note, no blocks

Actions menu:

- Remove Penalty / Message
- Modify Penalty / Message
- Archive Penalty / Message

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

Staff-Generated Penalties / Messages

Apply Penalty / Message

Actions ▾ Rows 25 ▾ Page 1 ▾

#	Applied On	Library	Note	Label
No Items To Display				

Archived Penalties / Messages

Set Date Start:

Set Date End:

Rows 25 ▾ Page 1 ▾

#	Applied On	Library	Note	Label
1	5/13/2018 4:18 PM	ME	This is an alert message!	Alerting Note, no blocks

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.

Add New Note

Lost Item Patron Visible 5/13/2018 4:33 PM Created by mobiusadmin

You left your umbrella at the library. It is in the Lost & Found at the Circulation Desk.

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.

User, Demonstration Notes 1

Profile Local System

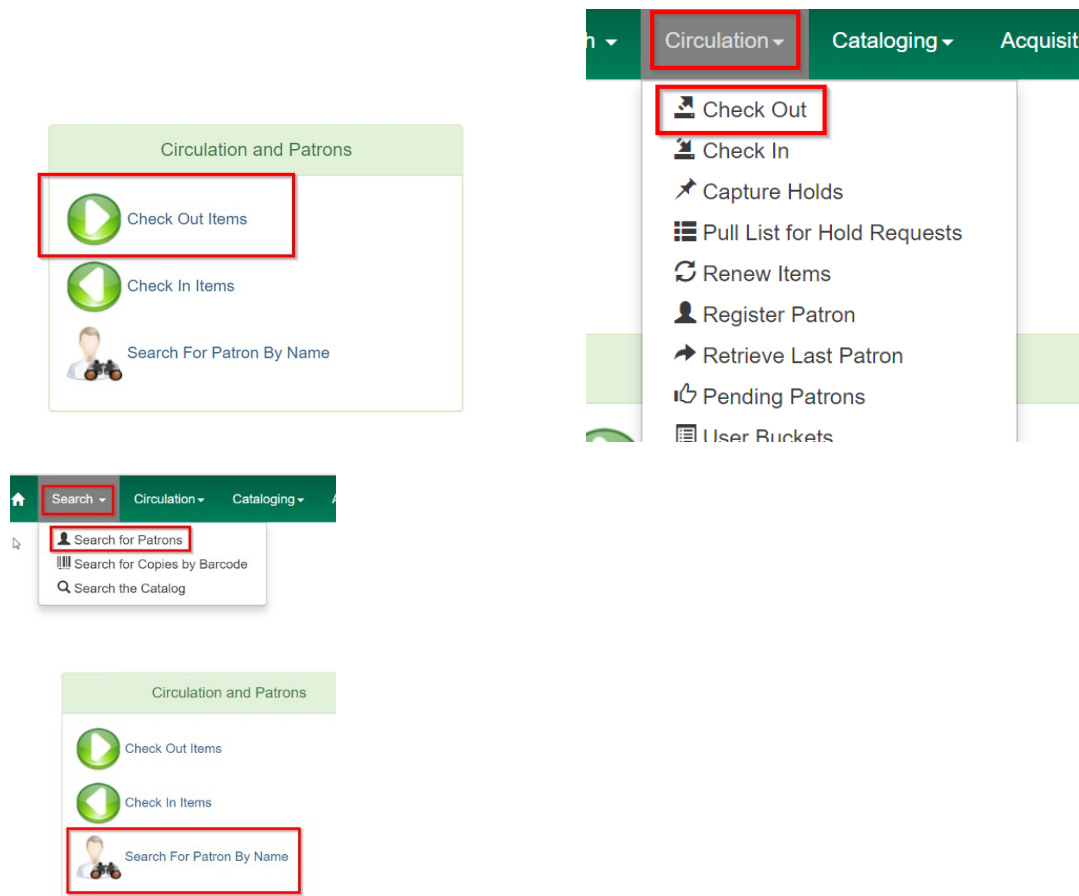
If you click on this "Notes #" message, it will take you to the note.

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).

Check Out Items Out (1) Holds (0 / 0) Bills (\$0.00) Messages Edit Other ▾ Patron Search

Barcode ▾ Submit Date Options ▾ 05/13/2018

◀◀ ◀ ▶ ▶▶ Rows 25 ▾ Page 1 ▾

#	Due Date	Title	Barcode
1	5/29/2018	MOBIUS Test Record Carrollton	1234567890000

Strict Barcode Quick Receipt ▾ Done ▾

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.

Barcode ▾ Submit Specific Due Date

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.

Barcode	<input type="text" value="Barcode"/>	Submit
---------	--------------------------------------	--------

Fine Tally: **\$5.00** Transaction for 498918229943 billed: **\$5.00**

Items Checked In

#	<input type="checkbox"/>	Alert Msg	Balance Owed	Barcode	Bill #	Checkin Date	Family Name
1	<input type="checkbox"/>		\$5.00	498918229943	1281	12/8/14 12:00 AM	Smith

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.

Record Summary

Title:	MOBIUS Test Record Carrollton	Edition:		TCN:	218991	Created By:	mobiusadmin
Author:	Joe Mobius.	Pub Date:		Database ID:	218991	Last Edited By:	carrolltonadmin
Bib Call #:		Record Owner:		Last Edited On:	11/13/2012 3:54 PM		

Start Previous Next End Back To Results (2 / 15) Add Volumes Serials Mark for: Other Actions:

OPAC View **MARC Edit** MARC View **View Holds** Monograph Parts Holdings View Conjoined Items

Search the Catalog [Advanced Search](#) [Browse the Catalog](#) [Set default view](#)

Search: Type: Keyword Format: All Formats Library: Missouri Evergreen

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

OPAC View **MARC Edit** MARC View View Holds **Monograph Parts** Holdings View Conjoined Items [Set default view](#)

Pickup Library

Detail View Actions Rows 25 Page 1

#	<input type="checkbox"/>	Potential Co	Author	Capture Date	Patron Barcode	Request Date	Available Date	Status	Title	Current Copy	Pickup Libr	Hold Type
1	<input type="checkbox"/>	2	Joe Mobi...		medemo	5/13/201...		Waiting f...	MOBIUS... 1234567890000	CPL	T	

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 *Hold Pull List*, select *Circulation* → *Pull List for Hold Requests*.

The screenshot shows the library system's navigation menu. The 'Circulation' menu is open, and the option 'Pull List for Hold Requests' is highlighted with a red box. A red arrow points to this option. The background shows a record summary for a book with fields like Title, Author, Bib Call #, and a table of holdings.

2. The *Hold Pull List* is displayed.

The screenshot shows the 'Hold Pull List' interface. At the top, there is a blue header bar with the text 'Hold Pull List'. Below the header, there are buttons for 'Detail View' and 'Print Full List'. To the right, there are navigation controls including arrows and dropdown menus for 'Actions', 'Rows 25', and 'Page 1'. Below these controls is a table with the following columns: #, Shelving Location, Call Number, Author, Title, Current Copy, Parts, Copy Status, and Potential Copies. The table is currently empty, displaying the text 'No Items To Display'.