

Patron Status


About: What to do once in a patron's record in a checkout screen – this is the “cool bar” – follow along with the icons that go down the left hand side of the screen too.











The patron registration form holds patron registration data including general, addresses and notification information.

The patron status form holds data that changes, either manually or electronically, as the patron uses library services. It includes information about blocks, checked out items, monetary transactions, claims, requests, reading history, outreach services profiles, associations, and notes.

Press F9 to switch between the Patron Registration and Patron Status workforms for a patron record.

- Open patron registration –  [CTRL+F9] allows you to go in and edit a patron's record



- Patron Status General View –  [ALT+G] (*G in red box*) – allows view of status, blocks, fines, items out – allows blocks to be placed
- Items Out –  [ALT+O] (*red arrow green box*) – a listing of a patron's checked out items
- Account –  [ALT+A] (*dollar sign*) – charges and money features associated with a patron's registration; allows payment of fees and fines, waiving, credits and notifications
- Claims –  [ALT+C] (*covered eyes*)
- Holds –  [ALT+H] (*yellow hand*) – allows viewing and placement of holds
- Reader Services –  [ALT+D] (*the house*) – allows ability to see items out, displays reading history
- Associations –  [ALT+W] (*windmill*) – allows grouping by family memberships, etc. See “+” and “-” for adding patrons or subtracting members
- Notes –  [ALT+N] (*blue paper*) – non-blocking and blocking notes; originally icon is in blue if there are none, and change to red if there are notes (these must be saved)