

Patron Status

Blocked



Policy:

A patron record is blocked by the system when:

- Unrestricted Card - Charges on the account total \$10 or more.
- Restricted Card - Charges on the account total \$5 or more.
- The patron has 10 or more items overdue.
- The patron has any item long overdue (45 days).



Recommendation:

Though it is possible to click “Yes” on the pop-up that is presented at checkout, staff should refuse to check out items to the patron when the system presents a block that indicates the patron has exceeded their maximum allowable fines or outstanding overdues.

Barred



Policy:

Barred patron code is used for patrons to whom the home library does not wish to extend circulation or loan privileges. Only the home library may bar a patron record. All barred records must be accompanied by an explanatory note, dated and signed. Barred status can only be cleared by the home library, or new home library.



Recommendation:

Reasons for which the Barred status might be used:

- Patron has moved

- Patron record information is incomplete or incorrect
 - The home library policy states that all household members are blocked when one member is seriously delinquent
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Procedures:

- Patron Notes and Blocks

Barring a Patron

1. Open the Patron's **Patron Registration work form** using any means at your disposal.
2. Use the pull-down menu associated with the **Patron code** and change it to **Barred**.
3. **Press F9 on the keyboard to switch to the Patron Status work form.**
4. Click on the **Notes view** icon in the left-hand side-bar.
5. Type the reason for the barring into the **Blocking notes** field, also include your initials, the name of your library, and today's date.