Search for Patron:

1. Click Patrons on top of navigation bar

2. Search for patron: last name and first 3 letters of first name

3. If account is found with matching name, begin comparing address

4. Click Edit: Update account information

      A. name—add middle initial (if possible) if no LEGAL middle name add NM to account

      B. First name=preferred name

      C. Other name=Legal name

      D. Contact information—select main contact method

      E. Renew account if expired

5. Click Save at top—yellow box

To issue a new card:

1. Click Patrons on top of navigation bar

2. Select +new patron

3. Select appropriate category

4. Enter data: fill as much of form as possible.

      A. First name=preferred name

      B. Other name=Legal name

      C. Add middle initial (if possible) if no LEGAL middle name add NM to account

      D. Contact information—select main contact method

      E. set expiration date in future

5. Scan Barcode and Confirm your library name appears

6. Insert barcode as username with scanner

7. Insert last 4 of phone number as password. (Patron can change this later)

8. Complete attributes and messaging preferences

9. Click Save at top—yellow box

> Parents or guardians can add children to their accounts.
> Create adult card then add child.

> Open all the boxes with the small triangle △

Add Guarantor to Youth account

1. Search for youth name

2. Click Edit

3. Skim account info and edit if needed

4. Find Patron Guarantor click add guarantor

5. Search for adult name (last name, first 3 letters of first)

6. When adult name is found on list, look to right and select name to match

7. Change drop down boxes if applicable

8.   Click Save at top yellow box

Merge Patron Cards:

1. Click Patrons on top of navigation bar

2. Search for patron: Last name and first 3 letters of first

3. If multiple accounts found that match the person, review to confirm they belong to the same person

4. ASK patron which location they prefer to be home library

    A. The one they will pick-up at or visit the most

5. Manage fines, fees or restrictions on both accounts

6. Identify the accounts you wish to combine by selecting boxes to left

7. Look towards top for merge selected patrons button

8. Click button, now you have the choice of which account to KEEP. The other will be deleted.

Alert: You can not undo this. Choose wisely. All data will with transferred.

> **Goal: One patron, One account.**
>
> Eliminate extra accounts.
> All cards work in all NorCat libraries.
> Patron selects home library.

Delete Patron Account:

1. Click Patrons on top of navigation bar

2. Search for patron: last name and first 3 letters of first name

3. If account is found with matching name/address

4. Click Edit: Scan to verify this is the correct account

5. Select more drop down from menu bar

6. Click on delete

7. Answer question in yellow box.

State Library recommends deleting patrons that are inactive for 3 years.

Update Temporary Patron Card: When patron has the appropriate verification to establish permanent card

1. search for patron: last name and first 3 letters of first name

2. If account is found: skim to compare full name, verify and/or complete the address field, fill in as much of the account information as you have available.

3. Fill in email if possible.

4. Change patron category from Temporary to correct category

5. Update messaging preferences, renew account expiration date

6. Click Save at top—yellow button.

Outstanding charges on account:

1. Search for patron name (last name and first 3 letters of first name)

2. If blocked due to charges, screen will alert you on right side.

3. Select Accounting tab on the left menu

4. Transaction tab shows details

5. Make a payment tab allows for partial payment and write off (forgive charges)

6. Create manual invoice will add more fines/fees

7. Create manual credit will add payment

8. Select the tab you need, Scroll right to see actions

9. Amount being paid is how much of this bill is the patron paying

10. Amount tendered is how much money they give you.

11. Computer figures the change to give back.

12. Add a note if needed.

13. Select payment type. (required)

14. Confirm with yellow button.

Any Lost book fees collected are forwarded to the owning library.

Fines are not. If you must collect them, libraries are not obligated to forward the funds.

You can but you don't have to.