Maintaining Patron Records in MassCat

If you need to edit the information contained within a patron's record, change a password for a patron, collect a fine, revoke borrowing privileges from a patron or leave a note within a patron's account, do the following:

Login to MassCat using your username and password:

Click on the "Patrons" link from the main menu.

Then either scan the patron's library card or search for the patron by name. Click "Search" or press the "enter" key on your keyboard:

You can also click on the "Search Patrons" link from the box at the top of any page in the staff area:

You can also browse for a patron account by clicking on the "Patron" link and then clicking on the letter of the last name for which you are searching:

Choose the name from the list of available patrons:

Browse by last name: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Results 1 to 3 of 3 found for 'k'

Card	Name	Cat	Library	Expires on	OD/I:
101	Kehoe, Scott Andover St. Suite 205 Danvers 01923	Library Staff (S)	SEMLS	08/27/2016	3/3
102	Kissman, Eli Quincy St.	Adult (A)	SEMLS	05/27/2009	0/0
pjk	Kissman, Paul Quincy St. Medford 02155	Library Staff (S)	SEMLS	05/27/2009	2/2

You will be taken to the patron's account:

Adding or Changing Passwords and/or Usernames:

The system is unable to display a patron's password anywhere within the system. If a patron has forgotten their password, you will not be able to look it up for them. The only course of action you will have is to change their password to something new. You can, however, look up a patron's username. If you wish to change the patron's username and/or password, or lookup the username for a patron, click on the "Change Password" button:

You will be taken to a screen to change either the patron's username or password, or both entries:

The current username for the patron will appear in the "New Username" box. If you just need to know what their current username is, you can see it here and share it with the patron. Do not click the save button, however, as that will save a new password for the user!

To change username only (keep current password) – Erase the data already present in the "New Username" and "New Password" boxes and enter the new username in the "New Username" box. **Make sure the "New Password" box is empty**, then click the "Save" button.

To change password only (keep current username) – Leave the data that appears in both boxes unchanged and simply click the "Save" button.

To change both username and password – Enter the new username in the "New Username" box and either change the password to a new password, or keep the data in the "New Password" box as it is. **Let the patron know what the new username and password are**, then click the "Save" button.

Editing Patron Details:
If you need to update details such as telephone numbers, addresses, or email addresses, click on the "Edit" button:

You will be taken to a data entry screen with all of the patron's current data filled in:

Modify Adult patron Nora Blake-student

Patron identity
Salutation:
Surname: Blake-student   *Required*
First name: Nora
Date of birth: 07/29/1995
Initials:
Other name:

Make changes and additions to the information displayed and click the "Save" button at the bottom of the data entry screen.

You will be returned to the "Patron Details" screen.

Fines Management:

Making Payments/Forgiving Fines:
If a patron needs to pay a fine for an overdue item or replacement fees for a lost item, do the following:

Go to the "Fines" tab in the patron's account menu. This is located on the left side of the screen toward the center of the page:

The screen will change and the patron's fines history will be displayed with the most recent fines charged to their account appearing at the TOP of the list:

To record payment of the FULL AMOUNT outstanding on a patron's account, click on the "Pay Fines" tab. The screen will change:

To record payment, choose "Paid" from the "Fines & Charges" menu list and click on the "Make Payment" button. A credit for the amount due for that item will be displayed and the outstanding fines will be cleared from the patron's account.

To take a fine off of a patron's account without receiving payment, choose "Write off" from the "Fines & Charges menu list and click on the "Make Payment" button. A credit for the amount due for that item will be cleared from the patron's account.

To record a partial payment made by a patron or to forgive some or all of the outstanding fines on a patron's account without collecting any money from the patron, click on the "Create Manual Credit" button:

To record a partial payment made by the patron, choose "Credit" from the "Credit Type" menu. Fill in the barcode number, description of the payment made and the amount of the payment made in the corresponding boxes.

Click on the "Add Credit" button and the credit will be recorded on the patron's account.

To forgive part or all of the amount due from the patron without collecting any money, choose "Forgiven" from the "Credit Type" menu. Fill in the barcode number, reason for forgiving the fine (or other information that will let you and the patron know why the fine was erased from the account) and the amount being forgiven in the corresponding boxes.

Click on the "Add Credit" button and the credit for the forgiven fines will be recorded on the patron's account.

Creating Charges on a Patron's Account:
The system will automatically create fines for overdue items as well as items with a status that has been changed to "lost."

There may be other situations when your library wishes to charge a patron, such as for replacement of a lost card, additional fees for processing items on their account, or for replacement of an ILL or other item that they borrowed but that was not charged out to their account.

To assess a charge to a patron's account, click on the "Create Manual Invoice" tab of the "Fines Management" screen:

Choose the type of charge that you wish to assess from the "Type" menu. Fill in the barcode number (if needed), description of what the charge is for and the amount of the fine/assessment in the corresponding boxes.

Click on the "Save" button and the fine will be recorded on the patron's account.

Adding Notes and Setting warnings on a Patron's Account:

Adding Notes:
Occasionally, you might need to alert other staff members to a situation regarding a particular patron or you might need to trigger circulation staff (or yourself) to remember to deal with a particular issue with a patron the next time she/he comes to the library.

Alternatively, you may need to communicate directly with the patron the next time that she/he logs in to their account.

To add a note to a patron's account either for library staff or the patron to observe, access the patron's account that you wish to add the note to and click on the "Edit" button in the "Library Use" area of the record (this is on the far right side of the "Details" screen):

Library use

Card number:	25
Borrowernumber:	20
Category:	Student (STUDENT)
Registration date:	07/29/2008
Expiration date:	10/29/2016
Registration branch:	St. Michael's Parish Library
OPAC login:	norastudent
OPAC password:	*******

Edit

You will be taken to a version of the patron's record with some fields available for modification. Locate the "Library Set-up" section of the screen. This is toward the center of the page.

To add a note that you wish the patron to see when she/he logs in to the OPAC, enter the note in the "OPAC Note" area of the screen.

To add a note that you wish other library staff to see, enter the note in the "Library note" area of the screen:

Library set-up

Registration date: 07/29/2008

Expiry date (leave blank for auto calc): 10/29/2016

OPAC note: Hello Nora!

Please go to the circulation desk and pick up your jacket the next time you are at the library.

Library note: Nora's jacket is behind the blue chair at the circulation desk. Please give it to her.

When the patron logs in to their account, the OPAC note will look like this:

student (Click here if you're not Nora Blake-student)

Message from the library

Hello Nora! Please go to the circulation desk and pick up your jacket the next time you are at the library.

When a staff member accesses the patron's account, the note will look like this:

Attention:

Notes:

Nora's jacket is behind the blue chair at the circulation desk. Please give it to her.

Setting warnings and Flags on a Patron's Account:

There are some preset flags that you can set on patron's accounts:

- A flag letting staff know that the patron's mailing address is bad and that they should get an updated one.
- A flag debarring the patron – blocking the patron's borrowing privileges until they clear up problems (such as too many overdue books or too large a fine) with their account.
- A flag indicating that the patron's library card has been lost and preventing any transactions from occurring on the account.

To set one or more of these flags on a patron's account, access the patron's account that you wish to set the flag(s) for and click on the "Edit" button in the "Library Use" area of the record (this is on the far right side of the "Details" screen):

Library use

Card number:	25
Borrowernumber:	20
Category:	Student (STUDENT)
Registration date:	07/29/2008
Expiration date:	10/29/2016
Registration branch:	St. Michael's Parish Library
OPAC login:	norastudent
OPAC password:	*******

Edit

You will be taken to a version of the patron's record with some fields available for modification. Locate the "Patron Account Flags" section of the screen. This is at the very bottom of the page.

The default setting is that all the flags are inactive. To set one or more flags, click the circle next to "Yes" by the flag(s) you wish to set:

Patron Account Flags

Gone no Address: Yes ○ No ⦿

Debarred: Yes ○ No ⦿

Lost Card: Yes ○ No ⦿

Save   Cancel

Gone No Address – Changing this to "Yes" will create a note at the top of the patron's account that reads: "The patron's address is in doubt." It will also place a block on the patron's ability to check items out. This should trigger you or other library staff to ask the patron for a new address the next time they come to the library.

The patron will also see a warning note when they login to their account in the OPAC:

> • **Please note:** According to our records, we don't have up-to-date contact information on file. Please contact your librarian, or use the online update form to submit current information (*Please note:* there may be a delay in restoring your account if you submit online)

Debarred – Changing this to "Yes" will place a block on the patron's account and will prevent them from being able to do anything – place holds, check items out, or login to their own account. They will have to consult with library staff in order to find out the problem on their account and clear it up.

The patron will also see a warning note when they login to their account in the OPAC:

> • **Please note:** Your account has been frozen. Usually the reason for freezing an account is old overdues or damage fees. If your account page shows your account to be clear, please consult a librarian.

Lost Card – Changing this to "Yes" will generate a note in the patron's account that reads: "Patron's card had been reported lost." It will also place a block on the patron's ability to check items out. You or other library staff should follow your library's policy regarding verification of a patron's identity.

The patron will also see a warning note when they login to their account in the OPAC:

- **Please note:** Your library card has been marked as lost or stolen. If this is an error, please take your card to the circulation desk at your local library and the error will be corrected.

Click the "Save" button at the bottom of the page to save the flag settings you have chosen.