

15 March 2023

Subject: SEE-STAFF User Status Procedure

Patron accounts can now be set to have a User Status of SEE-STAFF. This status works in the same way that BARRED status works; however, it can be used to notify staff that something on the patron account needs addressed. It is to be used for things like needing to update phone, email, left their keys at the desk, etc. Outside of changing a patron's status to SEE-STAFF, you should only change their status due to extenuating circumstances (making them BARRED if banned from the library, etc). Some libraries use MAN-COLECT for special purposes.

If a patron has something that staff needs to address, staff can change their User Status to SEE-STAFF in the Modify User wizard. Changing the patron status requires an override code. Use the standard override code "RSA" in the bottom Override entry box.

User ID: SNDEMO3	Street: 40 NAUGHTY CAT LN	City, state: MEOWINGTON IL	Zip: 48169	Email: CATNIPADDICT@KITTY.COM
Basic Info   Privilege   Demographics   Addresses   Extended Info				
Privilege expires: 11/9/2025				
PIN: *****	Override:			
Status: OK	Override:			
Claims returned: BARRED				
INACTIVE				
MAN-COLECT				
<b>OK</b>				
SEE-STAFF				

Email: CA				
Basic Info   Privilege   Demographics   Addresses   Extended Info				
Privilege expires: 11/9/2025				
PIN: *****	Override:			
Status: SEE-STAFF	Override:			
Claims returned: 0	Override: ***			

When staff uses this status, a note is **REQUIRED** to let other staff members know what needs to be addressed.

Basic Info Privilege Demographics Addresses Extended Info

NOTE 3.14.23 EMAIL BOUNCED BACK. PLEASE GET UPDATED ADDRESS THEN DELETE NOTE SN/RSA

COMMENT

LOSTITEM

STAFF

INACTVID

When the patron checks out with a staff member, this is what they will see:

CheckOut : Investigating BAR on NASLUND, JAMIE

This user is barred

Basic info

SNDEMO3

Status is: SEE-STAFF Privilege expires: 11/9/2025  
 Profile name: ADULT Group ID:  
 User cat1: AG\_ALS-PDC... Group name:  
 User cat3: User cat2: M...  
 User cat5: User cat4: EMAIL...  
 User cat7: User cat6:  
 User cat9: User cat8:  
 User cat11: User cat10:  
 Library: AG\_ALS-PDC... Birth date: 10/26/2020  
 Language: English Age: 2  
 Charge history rule: CIRCRULE

Next allowed loan date: Amount owed: none Credit balance: none  
 Checkouts: none Unpaid bills: none Holds: none  
 Extended info: yes Routings: none  
 Claims returned: none Orders: none Distributions: none  
 Outreach user: no Requests/messages: none

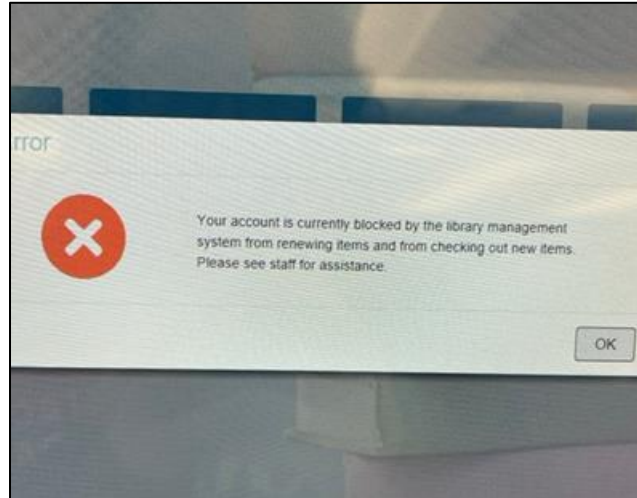
Extended info

Note: 3.14.23 EMAIL BOUNCED BACK. PLEASE GET  
 UPDATED ADDRESS THEN DELETE NOTE SN/RSA

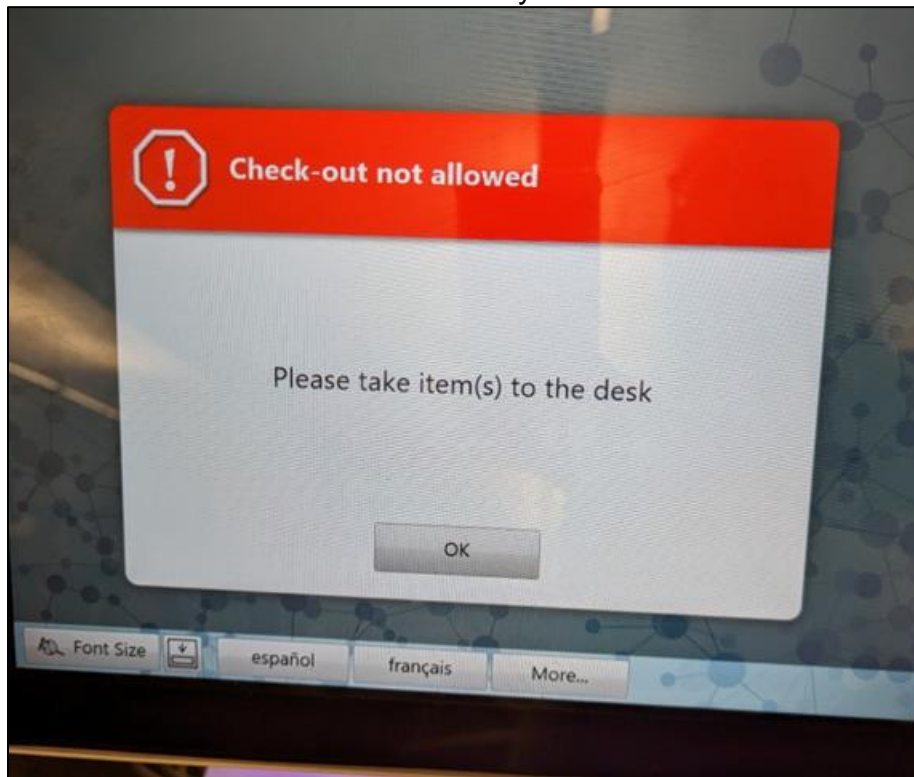
OK

If the patron checks out using a self-check machine, it depends on what coding each individual machine uses. For example, here are the Washington District Library and Morton Public Library machine responses:

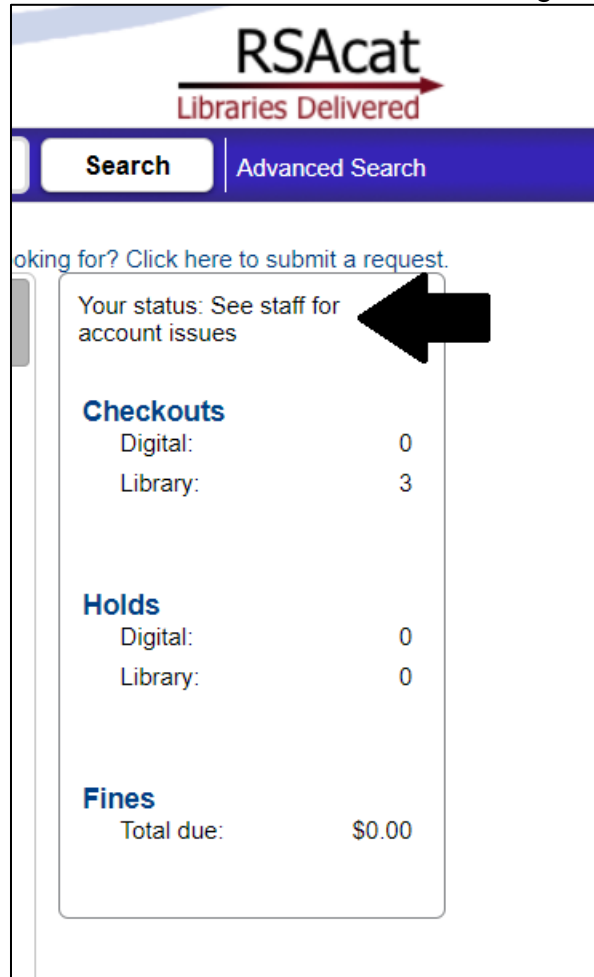
### Washington District Library Self-Check



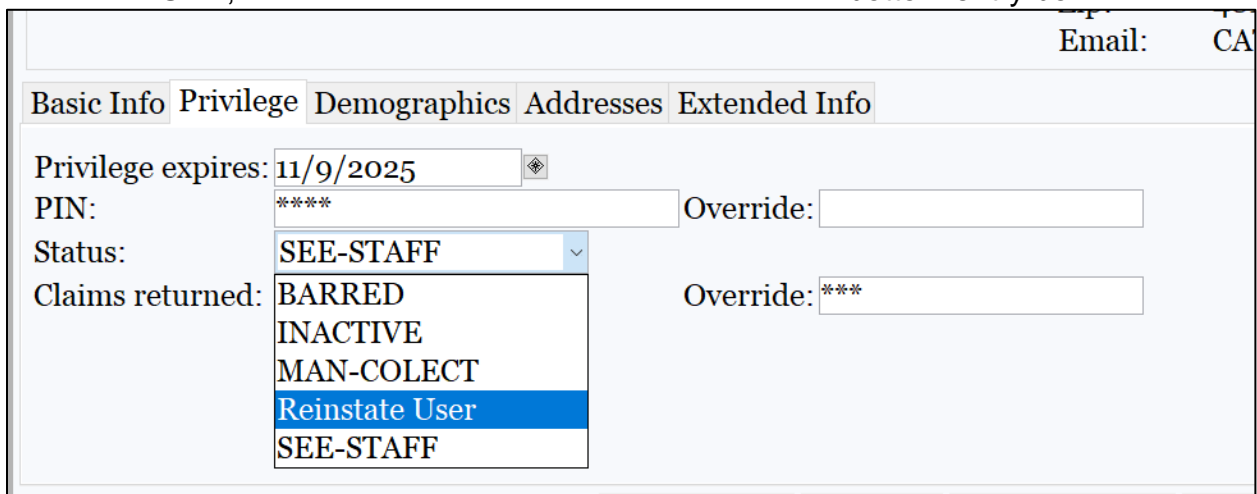
### Morton Public Library Self-Check



It will also notify a patron in their account in the online catalog.




Once the issue is taken care of, the user status needs to be reinstated. Select the status "Reinstate User," then enter the override code "RSA" in the bottom entry box.



Workflows will recalculate the patron's current status and set it appropriately.

Email:				
Basic Info	Privilege	Demographics	Addresses	Extended Info
Privilege expires:	11/9/2025			
PIN:	*****	Override:		
Status:	OK			
Claims returned:	0	Override:		

You will also need to delete the note from the patron account. You can completely remove the note by highlighting it and clicking the widget with the red X. You can also backspace out of the SEE-STAFF comment if there is additional information that should remain in the note text after removing the SEE-STAFF message.

Email: CATNIPADDICT@KIT				
Basic Info	Privilege	Demographics	Addresses	Extended Info
				
NOTE	3.14.23 EMAIL BOUNCED BACK. PLEASE VERIFY NEW EMAIL ADDRESS. SN/RSA			
COMMENT				
LOSTITEM				
STAFF				
INACTVID				