Manage patron accounts

Learn how to approve and block patrons as well as how to link a patron account to a borrowing request. Find information about patron ILL statuses and how to turn on patron approval in Tipasa.

Approve patrons

You can approve patrons while processing their borrowing request or by searching for their account. Patrons only need to be approved if you turned on patron approval.

• If you turned on patron approval, you will need to approve patrons in order to submit their borrowing requests.
  ◦ If it is their first time placing an interlibrary loan request, their request will appear in the New for Review queue.
  ◦ If a patron needs to be cleared for approval, you will see the question mark icon (?) on the Patron accordion in the borrowing request next to the patron’s name. This indicates the patron’s Patron ILL status.
  ◦ Patrons that have not been approved will require an override by staff in order to submit the request.
• If you do not have patron approval turned on, you are not required to approve patrons. All patron requests will be accepted as if they were approved.


From the patron section of a borrowing request

To approve a patron while processing their borrowing request, follow the steps below.

To approve a patron from their borrowing request:
1. On the left navigation, click **Borrowing Requests**.
2. Click **New for Review**.
3. On the New for Review screen, click the request **ID** or **Title** to display the request.
4. In the request, scroll down to the **Patron** accordion.
5. Click **View Patron**.
6. On the Edit Patron Record window, in the Interlibrary Loan section, select the **Approved** check box.
7. At the bottom of the window, click **Save and Apply to Request**.
8. The patron is now approved and you can continue processing the request as normal.

**From the patron account**

To approve a patron from their patron account, follow the steps below.

**To approve a patron from their patron account:**

1. On the left navigation, click **Find Patrons**.
2. From the Limit search to list, select an **index**.
3. In the search box, enter your **search terms**.
   - To search with a truncation operator, use an **asterisk** (*). For example, connect* retrieves connect, connection, connectivity, etc.
4. On the patron search results screen, click the **Name** of the patron you want to approve.
5. On the Profile screen, on the Basic User Data accordion, click **Edit** (on the far right).
6. In the Interlibrary Loan section, select the **Approved** check box.
7. Click **Save**.
8. The patron is now approved.

**Block patrons**

All patrons, regardless of whether you have patron approval turned on or off, can be blocked. When you block a patron, you will be unable to submit their request without an override. You may want to consider blocking patrons who have outstanding loans, fines, or fees. You can block patrons while processing their borrowing request or by searching for their account. Once a patron has been blocked they will no longer be able to submit a request from My Account.

Note: If you use WorldShare Circulation, this is not the same as a patron being prohibited from performing circulation functions in the system because of the circulation policies you have set up in OCLC Service Configuration.

Note: If you use third party authentication, you must remove them from your authentication service or **block them** in order to prevent them from submitting requests. Expired patron accounts will still have access to the OCLC system and will be able to place ILL requests.
From the patron section of a borrowing request

To block a patron while processing their borrowing request, follow the steps below.

To block a patron from their borrowing request:

1. On the left navigation, click **Borrowing Requests**.
2. Click **New for Review**.
3. On the New for Review screen, click the request ID or Title to display the request.
4. In the request, scroll down to the **Patron** accordion.
5. Click **View Patron**.
6. On the Edit Patron Record window, in the Interlibrary Loan section, select the **Blocked** check box.
7. At the bottom of the window, click **Save and Apply to Request**.
8. The patron is now blocked. You may want to cancel the patron’s request.
9. (Optional) Send a notification to the patron to alert them that their request has been canceled.

From the patron account

To block a patron from their patron account, follow the steps below.

To block a patron from their patron account:

1. On the left navigation, click **Find Patrons**.
2. From the Limit search to list, select an **index**.
3. In the search box, enter your **search terms**.
   - To search with a truncation operator, use an **asterisk** (*). For example, connect* retrieves connect, connection, connectivity, etc.

https://help.oclc.org/Resource_Sharing/Tipasa/Patron_management/Manage_patron_accounts
Printed: Wed, 21 Sep 2022 08:52:41 GMT
4. On the patron search results screen, click the Name of the patron you want to approve.
5. On the Profile screen, on the Basic User Data accordion, click Edit (on the far right).
6. In the Interlibrary Loan section, select the Blocked check box.
7. Click Save.
8. The patron is now blocked.

Link a patron to a borrowing request

A patron account must be linked to a borrowing request in order for the patron to view their request in My Account.

To link a patron to a borrowing request:

1. On the left navigation, click Borrowing Requests.
2. Click Create Request.
3. In the request, scroll down to the Patron accordion.
4. In the Name or ID field, enter the name or ID of the patron you want to link to the request.
5. Click the magnifying glass (🔍) next to the name or ID you entered.
6. On the patron search results screen, click the Name of the correct patron.
7. On the Profile screen, click Apply Patron Data to ILL Request on the right side of the screen.
8. The patron's information is applied to the request and the modified fields appear in green.
9. Continue processing the request as normal.

Note: Patron data is retained on closed requests for the time period specified in the WorldShare ILL > Patron Settings module of the OCLC Service Configuration. Please see Patron Data Retention for more information.

Patron ILL status

You can quickly determine whether a patron is approved, blocked, new, or needs to be linked based on their patron ILL status. The patron ILL status displays on the Patron accordion of borrowing requests. Note: Some statuses only display when patron approval is turned on. See Turn on patron approval for details.
### Types of patron ILL statuses

The following table describes the patron ILL statuses:

<table>
<thead>
<tr>
<th>PATRON ILL STATUS</th>
<th>ICON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>No patron linked</td>
<td>![⚠️]</td>
<td>A patron has not been linked to the request.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• See <a href="https://help.oclc.org/Resource_Sharing/Tipasa/Patron_management/Manage_patron_accounts">Link a Patron to a Borrowing Request</a> for details on how to add a patron to a borrowing request.</td>
</tr>
<tr>
<td>Pending approval</td>
<td>![❓]</td>
<td>The patron has never requested an interlibrary loan request before. This is their first time. You need to determine whether you want to approve or block the patron before you can submit the request.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• This status only displays if patron approval is turned on.</td>
</tr>
<tr>
<td>Approved</td>
<td>![✅]</td>
<td>The patron is approved for</td>
</tr>
<tr>
<td>PATRON ILL STATUS</td>
<td>ICON</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------</td>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>• interlibrary loan requests.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• This status only displays if patron approval is turned on.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• When patron approval is not enabled, all patrons are treated as &quot;Approved&quot; unless they are blocked.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blocked</td>
<td>☠️</td>
<td>The patron is blocked from requesting items through interlibrary loan.</td>
</tr>
<tr>
<td>• To place the request, staff need to override the block.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Turn on patron approval**

If you want the ability approve new interlibrary loan patrons, you must first turn on patron approval in OCLC Service Configuration.

- If patron approval is turned on, you will need to approve patrons in order for interlibrary loan requests to be submitted. Borrowing requests from patrons who are placing interlibrary loan requests for the first time will be routed to the New for Review queue for approval. Any automations with a patron that have not been approved or blocked will be stopped and routed to the New for Review queue.
- If patron approval is turned off, all patrons will be treated as if they are approved and staff are not required to take action on patron accounts.

To turn on patron approval:

1. Sign in to Service Configuration.
2. On the left navigation, click WorldShare ILL > Patron Settings.
3. On the Patron Settings screen, under Patron Account Management, select the On check box.
4. Click Save.