

# Workflows Tip of the Week

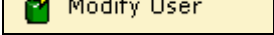


## Module: Circulation

### Summary: Updating an existing patron record

**Note:** Sometimes a patron comes into the library, having moved from another town, and wants to update their library. Follow the instructions below to make sure you are making all the needed changes.

### Instructions:

1. Look up the patron using the Modify User wizard. A yellow rectangular button with a green icon of a person and a pencil, and the text "Modify User" in black.
2. Be sure to verify with the patron all of the possible updates, including:
  - a. **Basic Tab:**
    - Name – we often see people with a new last name
    - Profile – are they older and need to be changed out of JUV or YA?
    - Library – change to your library
  - b. **Demographics Tab:**
    - User Cat1 – if they've moved, this needs to be changed.
    - User Cat2 – maybe they've moved into the state or your town.
    - User Cat3 – whether or not the patron wants to be notified by e-mail.
  - c. **Address Tab:**
    - Verify their phone & email information as well as their address.
  - d. **Extended Info:**
    - Are there old messages which may now be cleaned up? If so, take the opportunity of having their record open.

### Notes:

- If you don't use the proper information in the demographics, your library's statistics will be incorrect.
- If you don't use the correct profile, your patron may be blocked from using the OverDrive Digital Library collection, or be given the wrong loan periods for materials.
- If you don't change the Library in the Basic Tab your copies won't be held for this patron.