The Patron Experience

Permission Group / Profile

Assigning the correct "Main (Profile) Permission Group" is very important

You can see which Profile Groups are in use at your library by running this report.
- Reports --> SITKA_templates --> Patrons --> Patron Count by Profile Group then by one Stat Cat

You can see your current circulation policies by running this report
- Reports --> SITKA_templates --> Library Configuration --> Circulation Policies filtering by copy circ lib

BC One Card

- Always use *Search → Search for patron by Barcode* **[F1]** for the thorough search if the patron has a library card. This search will search all Patrons in the Sitka database
- Fine rates are determined by lending library/appropriate library federation policy.
- The BC OneCard borrower is responsible for any charges owing to the lending library.
  - **If the Patron is in the Sitka Database** – you will get a privacy prompt asking if the Patron wants to "Opt-in" to your library. Patron can now use your library and your rules will apply according to his existing profile
    - Patron accepts "Opt-in" to share personal information with your library
    - **Do not** change home library
    - **Do not** issue BC One card
    - **Do not** change the profile/permission group
  - If the Patron is not in the Sitka Database – you will get a message "barcode not found" - Register patron
    - Use the patron's home library card as the barcode and complete the patron registration form as per your local policy (Profile group can = BC One Card, or other per local policy)
    - **Do not** issue BC One card
    - Ensure the Home Library selected in Evergreen is the patron's actual non-Sitka home library

Feature Lists

You can use the "My Lists" function to create Feature Lists to share with your Patrons
http://docs.sitka.bclibraries.ca/Sitka/current/html/opac-account-my-lists.html
HTML view will allow you to copy the web URL to share / post on your website.

Library Settings Editor

- Circulation - Do not include outstanding Claims Returned circulations in lump sum tallies in Patron Display.
- Circulation - Warn when patron account is about to expire - If set, the staff client displays a warning this number of days before the expiry of a patron account. Value is in number of days.
- OPAC - Warn patrons when adding to a temporary book list - Present a warning dialog when a patron adds a book to the temporary book list.
- Program – Sending email address for patron notices
- Security – Patron: password from phone #

Action Triggers

If your patron reports that they did not receive a notification email [hold / predue / overdue], you can check their account for "Triggered events".
  - Retrieve the patron record [F1] --> Other --> Triggered Events