

## CARL Conversations: March 24<sup>th</sup>, 2021

### Topic: Blocks in CARL-X Check-Out

#### Question and Answer Session

1. Are Standard Notes available in CARL-X or just Urgent Notes?

There are both Standard Notes and Urgent Notes that can be used in CARL-X. The Standard Note will NOT block a patron whereas an Urgent Note will. The Standard Note also won't have a pop-up, and an Urgent Note will.

2. Is an Urgent Note the same as a Soft Block?

No. An Urgent Note will block the patron from doing anything: checkout, placing holds, and renewing items. Whereas a Soft Block will NOT do these things. A Soft Block is more for staff to see what needs to be addresses. Similar to adding a message to an account in Sierra. But both are staff-initiated pop-ups that appear when scanning a patron's card with these one of these on it.

3. Are Urgent Notes the only type of note that will generate a pop-up?

Yes and no. Urgent Notes will generate a pop-up, Big Red Box, on their own without needing a blocked status. A Standard Note on its own will not generate a pop-up. BUT, if a Soft Block is added to the account in conjunction with that Standard Note, then yes, it will generate a pop-up.

4. Should those Urgent Notes related to behavior be converted to a Standard Note for future reference?

Once an Urgent Note related issue has been resolved, and the library would like to keep this history, then yes, staff can change the Urgent Note to a Standard Note. Please include any additional information needed for the Standard Note and make sure to remove any blocks, if necessary, that will still keep the patron from checking out.

5. When staff remove the Urgent Note and manually change the status to "Good" is that immediate or do staff need to wait until the system runs overnight?

This should be immediate. If you are finding that it is not, please email OWLSnetHelp with the patron barcode and description of the issue.

6. Can a patron have an Urgent Note and still be in Good status?

Yes. Staff can add an Urgent Note onto an account with any status. Urgent notes act like messages did in Sierra, while also blocking the account. If you don't want to block the

patron from checking out but still want to notify staff of something, then staff would want to use a Soft Block status along with a Standard Note.

7. If a patron had an ILL to pick up at the desk or forgot something, I would want to put in an urgent note, to get a note to pop-up for staff?

This depends on what you want to accomplish. If you are just wanting to notify staff of an ILL item WITHOUT blocking the patron then no, you would just want to add the Standard Note and a Soft Block. If you DO want to block the patron, then yes, you can add the Urgent Note.

8. "Urgent" just means it's something that needs to be addressed - not necessarily something bad?

Correct, it doesn't need to be "bad" but urgent enough to block the patron from doing what they need to do on their end. If the situation doesn't require you stop the patron from checking out, renewing items, placing holds, etc. then we recommend using the Soft Block with a Standard Note.

9. When is a Soft Block generated?

Soft Blocks are not generated, they are put on by staff. A Soft Block is working as the message field did in Sierra.

10. Should we also indicate a reason for revocation?

This is not required but recommended. You can add an Urgent Note and use the Free Text field to add "Revoked - " and then your reasoning, along with initials and library code.

11. Does an expired card generate a Hard Block, or just a pop-up?

Yes, a Hard Block. We want accounts to expire so we can verify patron's information including their address. The system will block expired accounts until that is updated.

12. Is a Hard Block the only system generated block?

Yes. Hard Block is the only block that the system will put on automatically as needed. All the others would require some sort of staff interference. The Overridden block is system generated but only because staff initiated it. The Overridden block can only be taken off by the system, along with the Hard Block.

13. Is the ability to override a block more than once per day a new thing?

No. The system is currently set up for unlimited overrides for blocks. However, Connect does not allow for this same functionality. If you do find that staff are not being allowed

to override more than once in a day in CARL-X, please email OWLSnetHelp with the patron barcode and description of the issue.

14. Do juvenile accounts reaching "adult" age generate a Soft Block?

No. These accounts will be Hard Blocked once they reach 18. They will remain blocked until the patron re-registers as an adult.

15. If staff add a note to, for example, verify an address and list it as a standard note, will that generate any kind of block?

No. Adding a Standard Note will not block a patron. A Standard Note function as a Note field from Sierra.

16. If a patron renews items 3 times it doesn't seem to show up on their InfoSoup record. The Renew button is still there making them think they can renew, but they can't. Is there a way to remove the renewal button when they have reached the maximum renewal...or fade it out?

We are unsure of the answer and will look into it.

17. Should libraries be changing a status and or block that another library put on?

This would depend on the situation. But typically, it's best practice to call the home agency of who put the note/block on. If it's an Urgent/Revoked Note, then no, that should only be removed by the library who put it on. If it's just a Soft Block with a Standard Note indicating something along the lines of picking up an ILL, do not remove this. You can override it but since you physically don't have the ILL at your location, then you shouldn't remove this. Verifying the address would be something anyone can do as long as they fill out the patron update form on the website.

18. Can we please state again that libraries should remove the + short loan sticker note in the record if there is already a short loan sticker on the item?

Yes, if libraries have items in hand that are Short Loan, and have the sticker on it, they can go ahead and remove the message from the record indicating to put a sticker on. OWSL can add additional predefined messages or edit the current ones in the system to include removing the message once the sticker has been placed.

19. Are the same CARL Conversation sessions being held Wednesday afternoons and Thursday mornings?

No, so far each session has been different. If there's a topic that is really popular or if the group find it would be helpful to repeat a topic then we can certainly do that. But for now we will keep them different.