

## CARL Blocks, Meanings and Examples

CARLX	Carl Connect	Meaning	Examples When to Use
Good	Good	Patron CAN checkout and do what they need to BUT adding a Revoked Note to a Good account, WILL Block the patron. Urgent/Revoked Note takes precedence over Good Status (Revoked = Sierra language, see below).	All the time :)
Hard Blocked	Blocked	Patron CANNOT check out or place holds. CARLX will NOT allow for staff to manually update a Hard Block status to a Good status.	The system puts hard blocks on in accordance with our settings and when accounts should be blocked, such as: money owed over threshold and/or at least one billed item no matter the price.
Manual Hard Block	Restricted (Revoked = Sierra language, see below)	Requires a note to be added when using this block indicating WHY the block was added. IF it includes an Urgent Note, then the patron can't check out. Manually changing the Manual Hard Block to Good will still restrict the account unless the Urgent Note is removed in conjunction.	Use this block when a patron has been revoked of library privileges that are not system-generated, such as behavior reasons.
Overridden	Blocked w/ Override	This is the status that is put on by the system when staff Override a HARD BLOCK. This will remain on the account for the day. Overnight, processes will run and the next day the patron will have the HARD BLOCK back on their account. Only ONE override is allowed each day. CARLX will NOT allow staff to manually update an Overridden status.	When a patron is Hard Blocked and due to certain circumstances, you can choose to override the block to allow the patron to check out. Please use these at library discretion.
Soft Block	Alert	This does NOT block patrons from checking out. This is used as an indication for staff to look at the account as to a concern needing attention.	Use a Soft Block when needing to alert staff of situations such as: patron left personal items at library, parent permission for children, etc.
Urgent Note	Staff Note shows in RED *Note needs to be added in CARLX	Adding an Urgent Note to an account will stop patrons from checking out, even if in Good status. A big red box (BRB) will pop up in CARLX when scanning the patron barcode in the Charge function. A box will pop up in Carl Connect when barcode is scanned in Check Out function indicating there is an Urgent Note that needs resolving. Go back to the patron's account and remove the note to continue checkout.	You can add Urgent notes in CARLX when you need to: Mail Returned/verify an address, catch a signature, etc.
Urgent/Revoked Note	Staff Note shows in RED *Note needs to be added in CARLX	Adding an Urgent Note to an account will stop patrons from checking out, even if in Good status. A big red box (BRB) will pop up in CARLX when scanning patron barcode in Charge function. A box will pop up in Carl Connect when the barcode is scanned in Check Out function indicating there is an Urgent Note that needs resolving. Go back to the patron's account and remove the note to continue checkout.	Add an Urgent "Revoked" note for those accounts in which the patron has been banned, lost library privileges, behavior issues, etc... Typically requires director sign off. Please add staff initials as needed and a BRIEF description such as "Revoked for consistent crude behavior."