

## CARL Blocks/Notes - Meanings and Examples

Block/Note Name	Meaning	Examples When to Use
<b>Good</b>	Patron CAN checkout and do what they need to BUT adding an Urgent or 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 :)
<b>Hard Blocked</b>	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.
<b>Manual Hard Block</b>	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	Use this block when a patron has been revoked of library privileges that are not system-generated, such as behavior reasons.
<b>Overridden</b>	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 due to certain circumstances, you can choose to override the block to allow the patron to check out. Please use these at local library discretion.
<b>Soft Block</b>	This does NOT block patrons from using their account in any fashion. Staff can use this but if needing to notify staff, please use the Informational Note instead.	May be better off using an Informational Note instead if needing to notify staff the next time the card is scanned.
<b>Urgent Note</b>	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 when you need to: Mail Returned/verify an address, catch a signature, etc.
<b>Urgent/Revoked Note</b>	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."
<b>Informational Note</b>	Informational Notes are not associated with any blocks. This is strictly informational. 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 Patrons can still access and use their accounts.	Use these for situations where staff should be notified of patron information. Such as: patron forgot keys by computer or questions for staff.
<b>Standard Note</b>	Standard Notes are not associated with any blocks. This is strictly informational but will NOT notify staff upon scanning the patron barcode. Patrons can still access and use their accounts.	Use these for historical purposes in which staff don't need to be notified every time the patron barcode is scanned. Such as: keeping track of payment plans or conflicts.