

# CARL CIRCULATION QUICK TIPS

## Eligibility & Identification

- Per AL200 Library Accounts: Guest needs to verify address and have proof of identity to get an account.
- If an account holder uses a PO Box as a primary address, remember to verify they qualify for the account type being issued.

## Minors

- Adults 17 or older / Student may check out R-DVDs / Student Restricted cannot check out R-DVDs
- Parents may review the account or checkout without the minor present

## Statuses

- **See Notes:** Blocks guest from using self-checks, Draws attention to the account.
- **Over Threshold:** has materials 29 days overdue, fines over \$50, lost material, and/or at the Claims Limit
- **Overridden:** Staff talked with guest about account problem, did the one override to allow checkout. Staff should note account if the override is used letting other staff know a conversation was held.

## Account Types

- **Primary:** Individuals eligible for primary cards reside or own real estate in OK County or OKC.
- **Reciprocal:** Not eligible for ILLs, service agreement with Pioneer Library System
  - Reside, work, or attend school in Cleveland County, McClain County or Pottawatomie County.
  - Attend school in the Blanchard School District.
  - Note: We need proof of address to set up the account, but we do not require verification of school/work if that is the eligibility they meet.
- **School:** Individuals eligible for school cards must attend or work at a school, college, or university in Oklahoma County.
  - Accounts issued are valid for 365 days and eligibility must be verified annually.
  - Individuals must attend or work in a traditional, brick and mortar school building to be eligible for a school account.
  - Being an EPIC student does not alone qualify them for a School account
- **ONEcard:** Enrolled in OKCPS can access library resources.
  - Staff do not issue this account type. Data is received by the school districts four times per year.
  - Using their student ID (lunch card) number and last name, students can check out up to 10 books or audiobooks at a time
- **Annual Fee:** OK Residents that do not meet other eligibility criteria.
  - Non-refundable \$70, must be paid in full at time of issuing/renewing.
  - Additional cards for immediate family members in the same household may be obtained at no additional cost.
  - Note: After the \$70.00 is paid, update expiration dates on all cards in the household to one year. Place a "Standard" note on the paying customer card "Annual Fee Paid [date paid]".
- **Internet Access Only:** Only provides access to library computers.
  - Only name and birthdate are required.
  - Ensure minor accounts have an accurate birth year to ensure proper computer filters are placed.
  - If attempting to check out, a "Non-circulating item" big red box stating appears.

## Sponsor Reminders

- Address goes in Sponsor area.
- Enter Sponsor's name as:
  - LAST NAME, FIRST NAME, MIDDLE INITIAL
  - Examples: SMITH, DAVID H

## Search Tips

- Less is better!
  - Leave off middle names/initials
  - Leave off types of streets (BLVD, RD, etc)
- Wildcard: \*

# CARL CIRCULATION QUICK TIPS

## Notes

- Standard note is information. Informational Note is a BRB at Charge without a See Notes Status.
  - Standard: noting missing pieces, damaged material, a request to show ID prior to checkout, or Power of Attorney situations.
  - Informational: Payment Plan details
  - Urgent: Returned mail, system ban, a lost/stolen library card, or other urgent matters.
- *Urgent* notes block staff from being able to check out in CARL.
- **Always include** staff initials and branch.

## Entering Account Information

- Phone Numbers
  - Use Dashes
    - Example: 405-606-2210
- FULL LEGAL NAME
  - Used only if the preferred name is different than the legal name on their ID.
  - The name on the ID goes into the Full Legal Name field with their preferred name in Name Field.
  - Enter as FIRST MI LAST
- Addresses
  - Numbered streets do not use th, rd, st after the number.
    - Example: 4th, 3rd, 1st SHOULD be entered as 4, 3, 1
  - Always spell out the name of the street; may abbreviate the type of street (RD, ST, BLVD, AVE)
    - Example: 3 ST, CIRCLE DR, PENN AVE
  - Apartments should be entered as # instead of Apartment / Apt
    - Example: 123 MAIN # 42
  - PO Box to be entered as "PO BOX #" or "BX #"
    - Should have physical address listed on the account as well.

## Merge Accounts in CARL.Connect

1. Circulation > User Services > Merge Users
2. Scan Primary card (card to keep, correct address, name, contact information, etc.)
3. Scan Secondary card (the card to go away and merge into the Primary)
4. Close Merge
5. Verify in CARL.X or CARL.Connect User Look Up:
  - a. Primary card is correct,
  - b. Delete notes as needed,
  - c. Ensure status and account type are correct.

All fines, charges, holds will be moved to Primary card.

## Special Stops

- Special Stop notes should ONLY be removed by Manager of Access or Library Manager
- Special Stop status should ONLY be changed by Manager of Access or Library Manager

## AutoRenew

- **Material:** Attempts to renew 3 days before the due date.
- **Patron:** Attempts to renew 14 days before the expiration date. Account must be in "good" status, with last self service activity / last activity within the past 6 months.

## Hot Keys

- |                            |                          |
|----------------------------|--------------------------|
| F2 - Charge                | CTRL + L - Log in        |
| F3 - Return                | CTRL + F - Log off       |
| F4 - Renew                 | CTRL + R - Print Receipt |
| F5 - Patron Information    |                          |
| F6 - Item Information      |                          |
| F7 - Place Holds           |                          |
| F12 - Workstation Settings |                          |

## Item Searching Shortcuts

- //t - Title Browse
- //n - Author Name
- //v - Matcher File (bib # from old system)
- //z - CARL BID
- //w - Keyword Search