

Renewing Cards for Your Home Agency

Staff can renew a patron's account either in CARL-X or Connect. Staff can be notified by a Big Red Box of an expired account needing updating when they are in the Checkout function, or they can go right into the patron's account to update the expiration date and any other information.

Renewing an Account in CARL-X

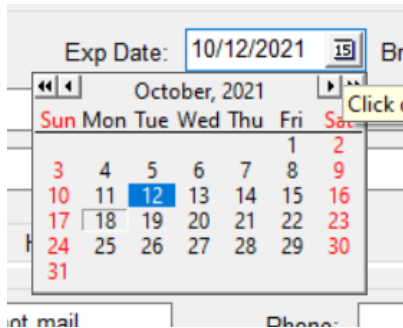
1. When trying to check out a patron who has an expired account, staff will get a Big Red Box indicating as such. Staff should click on the Patron Information button so that they can verify the patron's information is still correct.



*Staff could just update the expiration date from the above big red box and continue to check out the patron, but it is procedure to make sure all information is still correct and therefore should click on Patron Information.

2. Once in the patron's account, verify that their address is the same and nothing else has changed.
3. If there are any changes needed, please make those changes.
4. Update the expiration date to one year out (OWLS) and up to 3 years (NFLS) depending on your library's policies.
5. Click on the Save button in the bottom right corner.
6. When not checking out a patron, staff can go directly into the patron's account to update the expiration date.
7. Click on the Expiration Date field to type the new date in or click on the calendar icon to pull up the calendar, as seen below.

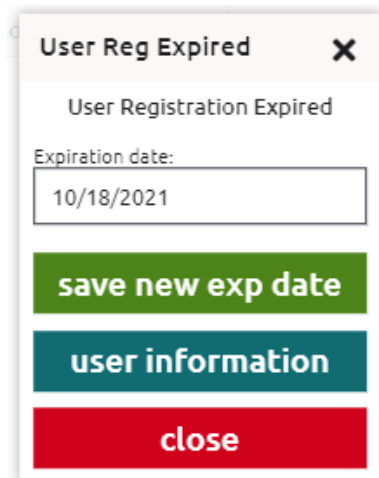
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8. Make sure to verify all information and click on Save when all changes have been made.

Renewing an Account in Connect

1. When trying to check out a patron who has an expired account, staff will get a box come up indicating as such. Staff should click on the User Information button so that they can verify the patron's information is still correct.



*Staff could click on the date and update the expiration date from the calendar that comes up and then click on the green "save new exp date" button. But it is procedure to make sure all information is still correct and therefore you should click on User Information to verify the patron's information.

2. Once in the patron's account, verify that their address is the same and nothing else has changed.
3. If there are any changes needed, please make those changes.
4. Update the expiration date to one year out (OWLS) and up to 3 years (NFLS) depending on your library's policies.
5. Click on the green "save information" button located in the bottom right-hand corner.
6. When not checking out a patron, staff can go directly into the patron's account to update the expiration date.

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- Click on the Expiration Date field to type the new date in or click on the calendar icon to pull up the calendar, as seen below.

The screenshot shows a calendar for October 2021. The calendar is displayed in a grid format with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates (1-31). The date 10/31/2021 is highlighted in red. The calendar is overlaid on a form with the following fields:

- ALTERNATE: [Empty field]
- MIDDLE NAME: [Empty field]
- DATE OF BIRTH: 5/15/19
- USER SIGNATURE: [Empty field]
- Expiration Date: 10/31/2021

- Make sure to verify all information and click on “save Information” when all changes have been made.