Suspend patrons

Last updated: Thu, 27 Aug 2020 17:48:40 GMT

Learn how to suspend patron accounts.
Use suspension as an alternative to or together with overdue fees to encourage patrons to return materials on time.

Suspended patrons attempting to place holds or renew items in WorldCat Discovery or My Account will be notified that their accounts are blocked. A message appears to library users at the top of the My Account screen which indicates when their suspension will end.

When a patron is suspended, they cannot:

- Check out items
- Renew items already on loan (including automatic renewals)
- Place holds
- Recall items on loan to other patrons
- Pickup items for existing holds or item schedules
  - The Pull List will not display items needed for a suspended patron
  - Checking in an item will not fulfill a request for a suspended patron
- Perform proxy borrowing activities
  - All proxy accounts will be suspended when the primary account is suspended
  - Proxy activity will contribute to the suspension status of the primary account
- Use SIP2-enabled services that use Patron Information Request to verify if a patron is in good standing (BLN for suspended patrons)

Note: See Account roles, overrides for information about the Circulation roles that can override and proceed if a patron
is suspended for circulation.

**Automatically suspend patrons**

Automatically suspend a patron from using circulation services after the patron returns or renews an overdue item. When the suspension period is over, the patron will automatically regain borrowing privileges.

Note: Suspension is cumulative. If the patron is not already suspended, the suspension period will begin at the time of the check-in or renewal. If the patron is suspended, suspension time will be added to the end of the current suspension period.

Suspension is automatically applied:

- When a patron returns an overdue item.
  - Staff will be notified on the Check In screen if the returned item has resulted in a suspension:
- When an overdue item is renewed on a patron's behalf.
  - A warning will appear when attempting to renew an item that could add suspension to the patron's account.

**Configure policies and settings for automatic suspension**

To automatically suspend a patron, configure the following policies and settings.

**Caution:** Patrons will be suspended according to the overdue suspension structure that is selected in the Loan Policy when the overdue item is returned or renewed. Suspension will be applied to overdue items already on loan under this Loan Policy.

Note: If your library participates in group circulation, suspension policies are set by the library that owns the overdue item. The suspending library is visible in the Suspension Details under the patron's account.

<table>
<thead>
<tr>
<th>CONFIGURATION</th>
<th>DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suspension Reason</td>
<td>- Create a suspension reason to describe why a patron was suspended.</td>
</tr>
<tr>
<td></td>
<td>- Suspension Reasons are used in Suspension Structures.</td>
</tr>
<tr>
<td>Suspension Structures</td>
<td>- Create a suspension structure to define how long a patron should be suspended after returning or renewing an overdue item.</td>
</tr>
<tr>
<td></td>
<td>- There are two types of structures:</td>
</tr>
<tr>
<td></td>
<td>1. <strong>Fixed Suspension</strong> will suspend a patron for a</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Circulation/Patron_management/Suspend_patrons
Printed: Sun, 10 Jan 2021 17:23:50 GMT
<table>
<thead>
<tr>
<th>CONFIGURATION</th>
<th>DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>set period of time per item returned.</td>
<td>2. <strong>Periodic Suspension</strong> can be used to change the rate of suspension penalties to reflect how long the item has been overdue.</td>
</tr>
<tr>
<td>2. Periodic Suspension can be used to change the rate of suspension penalties to reflect how long the item has been overdue.</td>
<td>• Suspension Structures are used in Loan Policy.</td>
</tr>
<tr>
<td>• Suspension Structures are used in Loan Policy.</td>
<td>• Select a Suspension Structure in a relevant Loan Policy to activate suspension penalties.</td>
</tr>
<tr>
<td>• The automatic suspension calculator will honor the following policy settings:</td>
<td>• The automatic suspension calculator will honor the following policy settings:</td>
</tr>
<tr>
<td>◦ <strong>Overdue Grace Period</strong>: If an item is returned during the grace period, then no suspension time will be added.</td>
<td>◦ <strong>Recall Due Date &amp; Grace Period</strong>: If a recalled item is returned during the grace period, then no suspension time will be added. If returned outside of the grace period, the recalled due date will be used to calculate how long the item has been overdue.</td>
</tr>
<tr>
<td>◦ <strong>Accrue bills and/or suspension when closed?</strong>: Your library’s open hours will be used to calculate the overdue duration for periodic suspension structures only if this setting is set to <strong>No</strong>.</td>
<td>• Notification Policies</td>
</tr>
<tr>
<td>• Create one or more suspension notification policies to keep patrons informed about suspension activity by enabling email notifications.</td>
<td>• Create one or more suspension notification policies to keep patrons informed about suspension activity by enabling email notifications.</td>
</tr>
<tr>
<td>• When configured, suspension notifications will be sent hourly to any patrons that have had suspension time added in the previous hour.</td>
<td>• When configured, suspension notifications will be sent hourly to any patrons that have had suspension time added in the previous hour.</td>
</tr>
<tr>
<td>• Suspension notifications include:</td>
<td>• Suspension notifications include:</td>
</tr>
<tr>
<td>◦ Your library’s configured subject line, start text, and end text</td>
<td>◦ Your library’s configured subject line, start text, and end text</td>
</tr>
<tr>
<td>◦ The patron's suspended-until date (as-of sending the email)</td>
<td>◦ The patron's suspended-until date (as-of sending the email)</td>
</tr>
<tr>
<td>◦ Details about suspension-related events</td>
<td>◦ Details about suspension-related events</td>
</tr>
</tbody>
</table>
**Patron Type Policy**

- Set a **Maximum suspension period** from the General section.
  - The maximum suspension period indicates how long a patron can be suspended at any given time.
  - By default, all patrons will have a maximum suspension period set to **No Limit**.
  - If a patron type should never be suspended, you can set the maximum suspension period to **0 Minutes**.
- Select the appropriate **Suspension Notification Policy** from the Billing and Suspension section.
- The patron’s suspension period will not be extended if the patron is currently suspended for the maximum period allowed by Patron Type Policy. Patrons can continue to return overdue items, but no suspension time will be added.

## Manually suspend a patron

You can manually suspend patrons even if your library is not using automatic suspension. At your discretion, you may also reduce a patron's penalty by subtracting time from the suspension period.

Note: The CIRCULATION_ADMIN role is required to make manual suspension updates. Other roles will be required to provide override credentials to proceed. See [Account roles](https://help.oclc.org/Library_Management/WorldShare_Circulation/Patron_management/Suspend_patrons) for more information.

Configure the below policies and settings to use manual suspension:

- **Suspension Reasons**
  - Enter at least one value to be used when reducing a patron's suspension period.
- **Maximum suspension period** set in **Patron Type Policy**.
  - A warning appears if the suspension period you have selected exceeds the **maximum suspension period**. Acknowledge the limit to proceed.
- **Suspension Notification Policy** linked to **Patron Type Policy**.

### To manually suspend a patron:

1. From the patron profile, select the **Suspension** tab.
2. Click the **Update Suspension** button. From the **Update Suspension** dialog box:
   1. Select the relevant suspension reason.
2. Change when the suspension period will end.
   - If the patron is already suspended, then the current suspended-until date will be pre-populated in the update form for easy reference.
   - If the patron is not suspended, then the suspend-until date will default to the current date at 11:59 PM.

3. Link the suspension update to a specific item, where relevant.

4. Add a note.

Changes to the patron's suspension status will take effect immediately. Details about the update will also be included in any Suspension Notification email configured to be sent to the patron.

Note: If your library participates in group circulation, any library in the group can manually update a patron's suspension status. The suspending library is visible in Suspension Details dialog. To limit suspension penalties levied against your patrons, use the maximum suspension period in Patron Type Policy.

View suspension details

Staff can find details about the patron's status under the Suspension tab in the Patron's account. The Suspension History accordion includes details about suspension events, including the reason for suspension, the related item, and a summary of how much suspension was added.

The Suspension History will include an entry for every update to a patron's suspension status, including if time was added or subtracted to the suspension period.

Note: Suspension history is retained by the system until the user's account is deleted.

Use the Details link to see more information about a suspension event or to add and edit notes:
<table>
<thead>
<tr>
<th><strong>Suspension Details</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patron</strong></td>
</tr>
<tr>
<td><strong>Suspending Library (Branch)</strong></td>
</tr>
<tr>
<td><strong>Operator</strong></td>
</tr>
<tr>
<td><strong>Transaction Source</strong></td>
</tr>
<tr>
<td><strong>Suspension Reason</strong></td>
</tr>
</tbody>
</table>
| **Event Summary**             | Suspended until 09/12/2019 11:59:59 PM  
  *Added 5 days* |
| **Item**                      | Laptop #6/Toshiba      |
| **Notes**                     | Power cable wasn't returned. Patron was billed. |

[Save] [Cancel]