

# Patron Blocks

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## Introduction

Patrons can have blocks put on their accounts for various reasons, usually involving overdue items or unpaid bills.

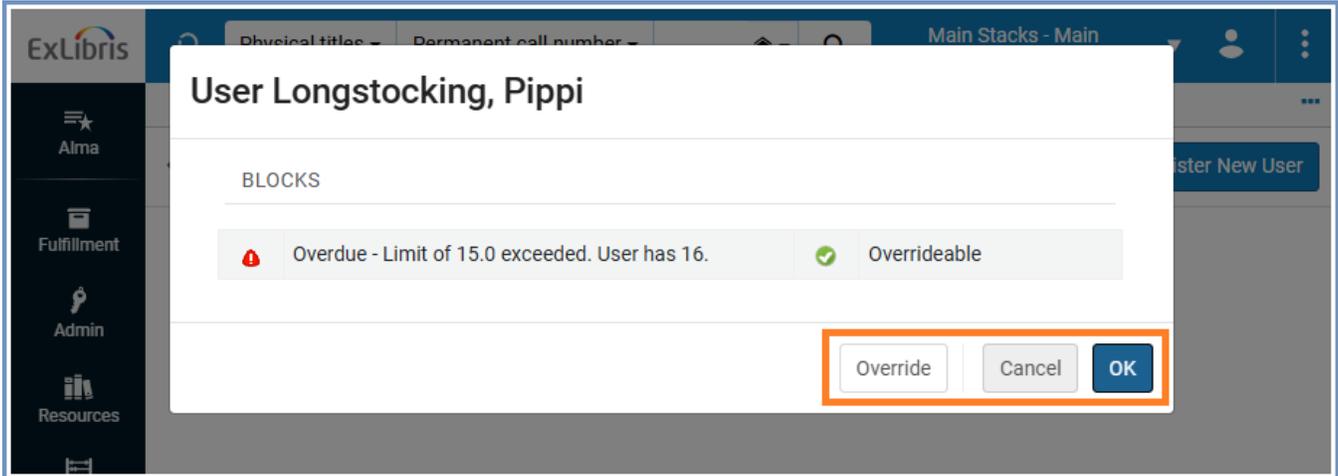
If a patron has a block on their account, it generally means that they:

- Can't renew their currently checked-out items themselves.
- Can't request items.
- Can't check out items.

For most patron blocks, a notification will pop up when you open their account in Alma. If the patron block is for Overdue Limit Exceeded, we may be able to renew enough items to remove the block. For most other blocks, the patron will have to take action to remove the block, such as returning overdue items or paying a bill. If there's a pop-up notification, it should have details about what caused the block and who the patron can reach out to about taking care of it.

## Buttons on the Patron Block Pop-up Notification

When you pull up a patron's record, you may get a pop-up that indicates that the account is blocked. It will have up to three buttons to choose from.



1. **Override:** Clicking "Override" allows you to proceed as if there were no blocks. This option is not always available. It depends on the type of blocks involved and the Alma roles that have been assigned to you.
2. **Cancel:** Clicking "Cancel" takes you back to the previous screen (usually the "Manage Patron Services" screen).
3. **OK:** Clicking "OK" allows you to enter the patron record with all blocks still in place. No loans or renewals are possible in this scenario.

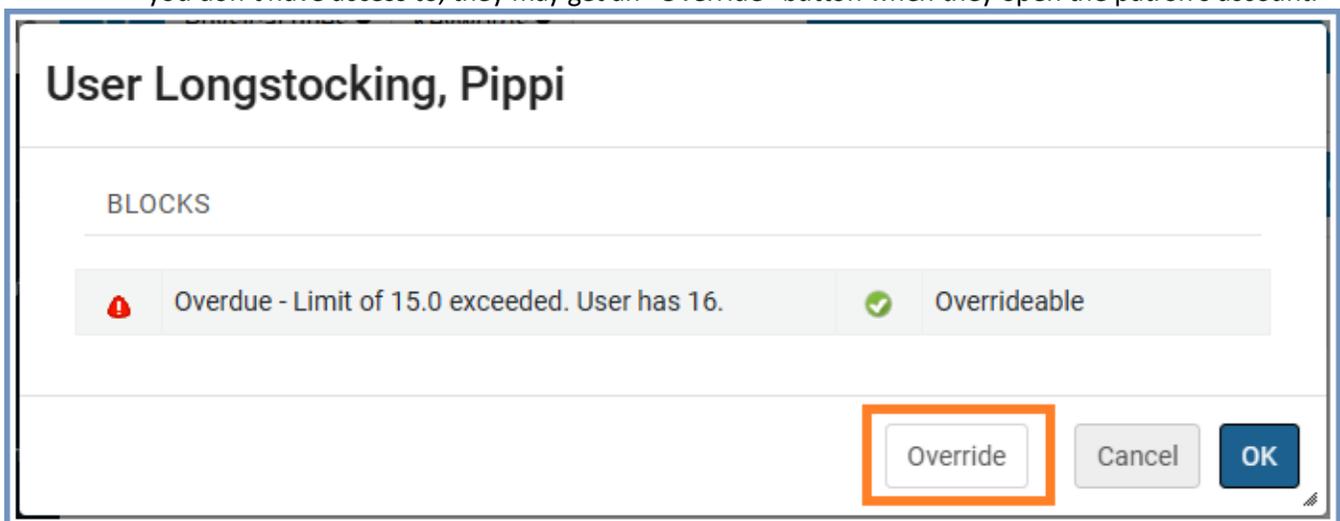
## Overdue Limit Exceeded

### Basic Steps:

- If this notification pops up, click “Override”.
  - If you don’t have an “Override” button, check with a co-worker or supervisor for assistance.
- Ask the patron if they would like you to try to renew all overdue items from University of Illinois Urbana-Champaign.
  - If you can renew enough items to bring the number of overdue items below the limit, the block will be cleared.
  - If you can’t renew enough items to get below the limit, the patron will need to take action to remove the block. This may require bringing items to the library to have them checked in. Until the block is removed, do not check items out to the patron or request items for them.

### Detailed Workflow:

1. If a patron has exceeded the limit of overdue items, their account will be blocked. They won’t be able to renew their checked-out items themselves through their online account.
  - a. The limit varies depending on the patron and where the items are from.
    - i. For Courtesy Card patrons, the limit is 15 overdue items.
    - ii. For patrons affiliated with the University of Illinois Urbana-Champaign, the limit is 35 overdue local items or 5 overdue I-Share items.
    - iii. For I-Share patrons, the limit is 5 overdue items.
  - b. The block applies regardless of how overdue the items are, including if they’re overdue by one day.
  - c. In general, library staff can override the Overdue Limit Exceeded block and renew any of the items that haven’t reached their renewal limit and haven’t gone to “Lost” status, but it depends on what Alma roles they have.
2. If a patron’s account has a pop-up notification saying that they’re blocked because they exceeded the limit of overdue items, and there is an “Override” option, click “Override”.
  - a. If there is no “Override” option, check with a co-worker or supervisor. If they have Alma roles that you don’t have access to, they may get an “Override” button when they open the patron’s account.



3. Once the “Override” button has been clicked and the patron’s account is open, ask the patron if they would like you to attempt to renew all the overdue items from this university. If so, renew them as usual. If the number of overdue items goes below the limit, the block will be removed.

**My Institution - Loans (1 - 16 of 16)**

Scan Item Barcode

Sort by: Due Date | Filter by: All

All Results ✔ Success (16)

1	<input type="checkbox"/>		1980 census of population and housing. Census tracts. By United States. Bureau of the Census. Barcode 30112039582215 Loan date 11/27/2024 Due date 01/02/2025 17:00:00 CST Renewed	Owning library Main Stacks Call number DOC. C 3.223/11:980/ Description no.345 Stockton, CA Notes (1)	
2	<input type="checkbox"/>		1980 census of population and housing. Census tracts. By United States. Bureau of the Census. Barcode 30112061825078	Owning library Main Stacks Call number DOC. C 3.223/11:980/	Renew ...

**Notification 1 (Green):** Action completed on 16 of the 16 selected items. [Click here for the list](#)

**Notification 2 (Red):** Failed to send activity report.

- a. There may be items that still won’t renew. This is usually because the item has gone to “Lost” status or reached its limit of renewals. For those situations, check the [Request or Renew Items](#) LibGuide page for information about the patron’s options.
- b. If you can’t reduce the number of overdue items to be below the limit listed in the pop-up notification, then don’t check new items out to the patron or request items on their behalf. The patron will need to take action to remove the block, which may require bringing items to the library to have them checked in.

**Note:** If you clicked “OK” on the pop-up notification instead of “Override”, you won’t be able to renew the items. In that case, copy the patron’s information, exit out of their account, and then open their account again and click “Override” this time.

**My Institution - Loans** (1 - 16 of 16)

Scan Item Barcode

Action could not be completed on 1 of the 1 selected items. [Click here for the list](#)

Sort by: **Due Date** ▾

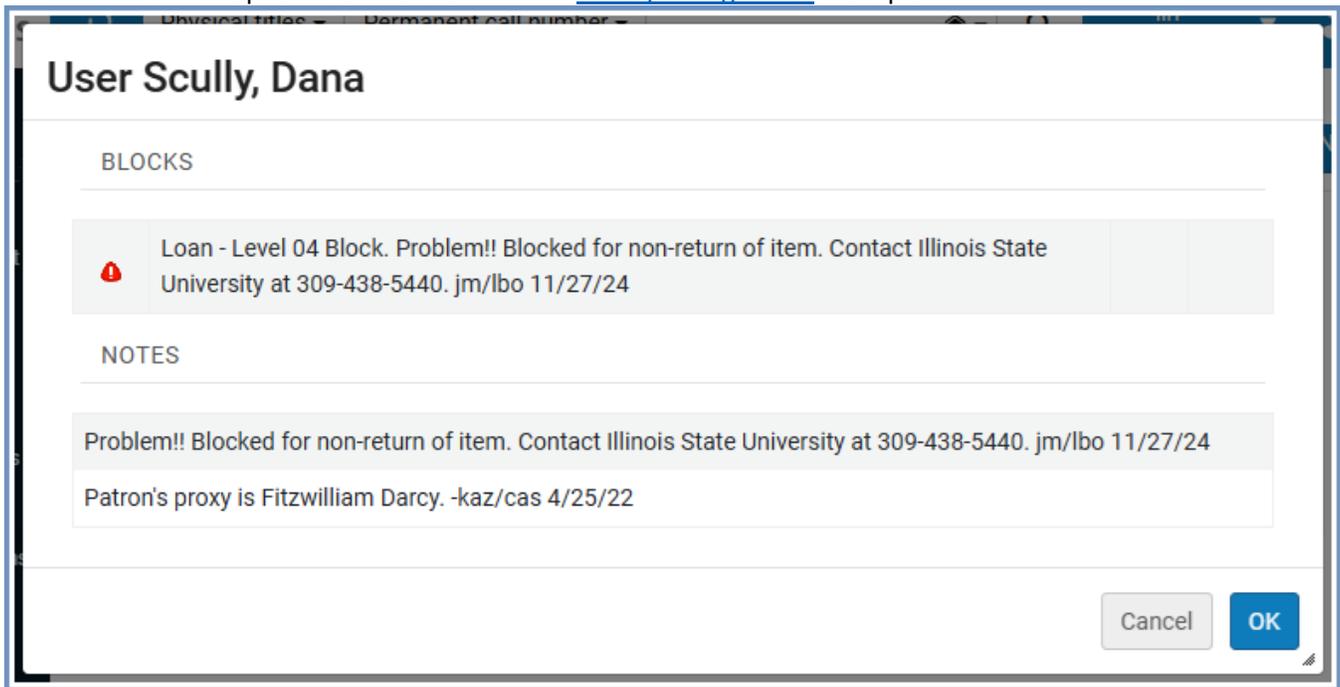
**All Results** ❗ Failure (1)

1	<input type="checkbox"/>		<p><b>The knowledge illusion : why we never think alone / Steven Sloman and Philip Fernbach.</b> By Sloman, Steven A., Barcode 30112120527343 Loan date 11/07/2024 Due date 12/05/2024 22:00:00 CST Normal</p>	<p>Owning library Main Stacks Call number B105.T54 S56 2017 <b>Overdue</b></p>	<p>Renew ...</p>
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Overdue - Limit of 15.0 exceeded. User has 16.

## I-Share Blocks

- An I-Share block can happen automatically or be placed manually.
- One type of automatic block is if a patron has an I-Share item that is 21 days overdue. In that case, their account will be blocked with regards to the I-Share institution that the item is from.
  - The notification for this block won't pop up when you first open the account in Alma. However, there will be a notification if you try to do something that would be affected by the block (such as trying to check out a different item from the blocked I-Share institution).
  - If the patron has questions, they can contact the I-Share institution. If they don't have the institution's contact information, they can contact our [Library Billing Office](#).
    - The patron also should have gotten a notification email from that I-Share institution, so they may be able to contact them by replying to that email.
  - If the item is returned, the block will be removed automatically.
- One type of manual block is if an I-Share institution contacts us to request that we place a block to suspend the borrowing privileges of a patron who failed to return or renew materials when due, who failed to return recalled material promptly, or pending the receipt of payment for billing fees or lost book charges.
  - This type of block will affect all items from any I-Share school, as well as local items.
  - Once the issue has been resolved, the block must be removed manually by our Library Billing Office.
- If an I-Share block notification pops up when you open the patron's account, it will not have an "Override" option.
  - If the pop-up includes contact information for the I-Share institution, share it with the patron so they can reach out to that institution with any questions.
  - The patron can also contact our [Library Billing Office](#) with questions.



The screenshot shows a user account page for Dana Scully. The page is titled "User Scully, Dana" and has a "BLOCKS" section. A red warning icon is next to a block notification: "Loan - Level 04 Block. Problem!! Blocked for non-return of item. Contact Illinois State University at 309-438-5440. jm/lbo 11/27/24". Below the blocks section is a "NOTES" section with two entries: "Problem!! Blocked for non-return of item. Contact Illinois State University at 309-438-5440. jm/lbo 11/27/24" and "Patron's proxy is Fitzwilliam Darcy. -kaz/cas 4/25/22". At the bottom right of the page are "Cancel" and "OK" buttons.

## Other Billing-related Blocks

- Patrons can be blocked because they haven't returned certain overdue items such as Loanable Technology, Interlibrary Loan items, or recalled items.
  - For any billing-related block, the pop-up notification should include contact information so that the patron can reach out to that department with any questions. If it doesn't, the patron can also contact our [Library Billing Office](#) with questions.

### User Darcy, Fitzwilliam

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BLOCKS

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 Loan - Level 04 Block. Problem!! Patron blocked for non-return of Loanable Tech items. Please contact [loanabletech@library.illinois.edu](mailto:loanabletech@library.illinois.edu) with any questions. jm/lbo 11/27/24

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NOTES

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Problem!! Patron blocked for non-return of Loanable Tech items. Please contact [loanabletech@library.illinois.edu](mailto:loanabletech@library.illinois.edu) with any questions. jm/lbo 11/27/24

Proxy for Dana Scully. -kaz/cas 4/25/22

Proxy for Daenerys Targaryen. -kaz/cas 4/24/22