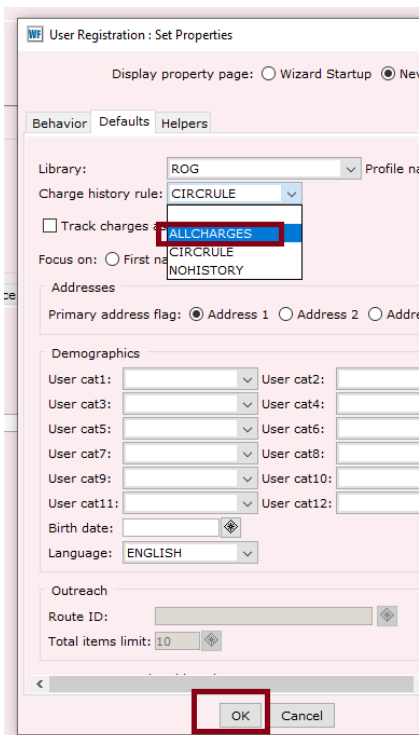


The new "**Charge History**" feature has been turned on for your patrons so that checkout history will officially show up May 1, 2021. Charges will NOT be visible if they occurred before this feature was turned on. *Our records retention policy is seven years. When the time comes, only seven years of charge history will be retained.*

Staff Side:

- ALL SLC shared system libraries have this turned on ~~EXCEPT MPL and WAM/WCV, WDB, WMB~~ (ALL libraries now have this feature turned on).
- I have run an edit users report to globally change all patrons with the charge history rule: CIRCRULE, found in the basic info tab of the patron's record, to now be set to **ALLCHARGES**. (~~Except for MPL and WAM, WCV, WDB, WMB.~~)
- **IMPORTANT:** be sure to change your property settings, when creating new user cards, to Charge History Rule: ALLCHARGES. It defaults to CIRCRULE, which we do not want for charge history. It **MUST** be set to ALLCHARGES (*I will have a report running in the background to catch any that may be missed by staff*). Be sure to save your changes when logging out of Workflows so that the settings are saved (screenshots below)



Basic Info

Charge history rule: ALLCHARGES ALLCHARGES CIRCRULE NOHISTORY

Below shows the Charge History tab in the patron record where the charge history will display (after items are discharged):

Summary | Addresses | Extended Info | SMS Notice Contact Info | Bills | Checkouts | Holds | Routings | Bookings | Suspension | **Charge History** | User Groups

Title	Item ID	Date Charged	Date Due
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Display options
Library: All libraries

Patron side:

- The patron side involves **Enterprise**. For patrons to see their charge history, they will be able to enable it by logging into their account. (Except for MPL and WAM, WCV, WDB, WMB patrons.) Patrons will be able to checkmark the box to see their checkout history in My Account. (Screenshots below)

Personal Information | Checkouts | Holds | Fines

Change PIN

Preferences

Default Language: English

Default My Account Tab: Holds

Default Checkouts View: Library Checkouts

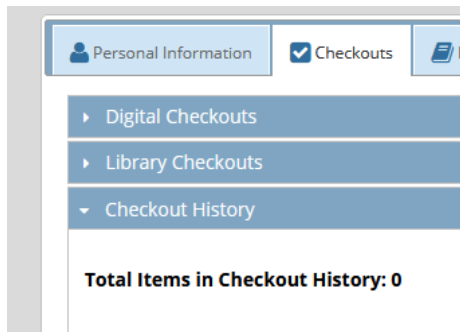
Default Holds View: Library Holds

Preferred List: no default list

Preferred Pickup Library: St. Clair Shores Public Library

Show my checkout history

Update



Please note: [If individual patrons decide they do not want their charge history turned on](#) they can choose to NOT checkmark the box (shown above) in Enterprise, and then they will not see their charge history.

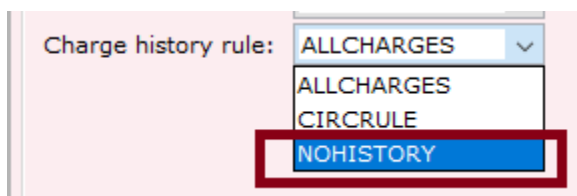
~~*Caveat:* If a MPL or WAM, WCV, WDB, WMB patron logs into another library's Enterprise page, they will be able to see and enable the checkbox for checkout history (as shown above).~~

As always, please let me know if you have any questions. This is a brand new feature so we may come across small tweaks that need to be made. Thank you.

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FYI:

For individual patrons wanting to opt out, opting out via Enterprise, as I mentioned below, is a good way. But another possibility that should work is for staff to change their Charge History in the basic tab to **NOHISTORY** (in the patron's record). But be careful, as this will prevent any further charge history from being tracked.



Side note: if a patron doesn't want individual items to show up in the charge history, but normally wants charge history turned on, before discharging the item(s) change the charge history rule to NOHISTORY (or CIRCRULE) as shown below. Then discharge the item. Lastly, change the charge history rule back to ALLCHARGES and the charge history will continue to count for future checkouts/discharged items 😊.

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5/10/21

It was brought to my attention that some of you had questions about how to print the charge history in Workflows from the patron's record. As of now, there is no perfect way. I will share the best way Sirsi suggested:

It appears the only way to capture all of the charge history (including for charges that can't all fit onto the screen) is to go into the display user wizard, select the user, click on charge history then use the File---Print screen which will capture the screen including the header at the top, then all of their charge history records into another application. The application will generally be whatever the file--->print setup field is for application for dump screen which will need to be an application which supports html.

Once the records are in the application you should be able to print from that application.

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8/15/21

Removing patrons with charge history

Hello,

We have a new workflow. If library staff wants to manually remove patrons, before staff can use the "remove user" wizard, library staff now will have to contact slcstaff@libcoop.net with the patron barcode or barcodes. I/we will then run a remove charge history report so that the charge history is removed from the account of the patron(s) you want to remove from the system. Immediately afterwards, I/we will let you know when the report finishes (it is a fairly quick report), and you can then manually remove your patron as you have been until now (using the "remove user" wizard in Workflows). Otherwise, if you try to manually remove your patrons, you will receive a charge history error.

We apologize for the slight inconvenience. Please let me know if you have any questions. Thank you☺.

Steps when you want to manually remove a patron:

- Contact slcstaff@libcoop.net with the patron barcode(s)
- SLC staff lets you know the charge history has been removed
- You may remove the patron as you normally would, using the "remove user" wizard

- Users
- Display User
- User Registration
- Modify User
- Copy User
- Confirm Address
- Renew Privilege
- Suspend User
- Send Message
- Remove User**
- Unsuspend User