User Statuses

Every user in the system has a status. There are four user status settings:

OK

Patron has full library privileges as defined in their User Profile policy. The patron is in good standing and has no overdue items, bills, or fines.
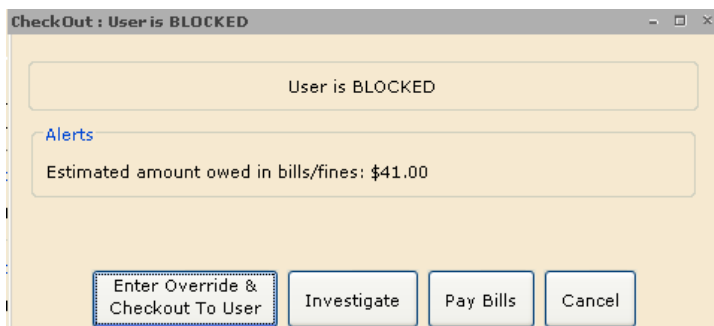
DELINQUENT

Users become DELINQUENT when they have unpaid bills or overdue items. Delinquent users can still check out items and have all the other privileges of OK users, but Symphony will warn you that the user is delinquent.

BLOCKED

Users are BLOCKED when their unpaid bills and accruing fines reach a certain amount or they have a certain number of overdue items. The patron cannot place holds or check out items unless you override the status, or until the patron clears their outstanding obligations.

You will get the following pop-up window:

1. If the patron chooses to pay the bill, click on the **Pay Bills** button and follow the procedures listed in the **Paying Bills Wizard** section below.

2. If the patron needs more information about the bill, click on the **Investigate** button. This will allow you to view the charges listed under the **Bills** tab but will not allow you to pay or waive them.

3. If there is a good reason to override the block and allow the patron to checkout materials, click on the **Enter Override & Checkout To User** button. Your Circulation Supervisor will provide you with the proper override code.

Symphony maintains these three statuses through the Update User Delinquency Status report. The fourth status is described below:

BARRED

BARRED users cannot check out items. Staff members cannot override this status. A user cannot be automatically barred or unbarred by Symphony; this is a manual process that is set or removed using an override code on the Privilege tab of the user's record. Only managers have the authority to Bar a patron's privileges.

Paying Bills Wizard

Patrons can accrue bills for library services, overdue items, or damaged or lost items. WorkFlows creates bills during daily functions like discharging a book or running a report. You can also create a bill manually using the **Billing a User** wizard.
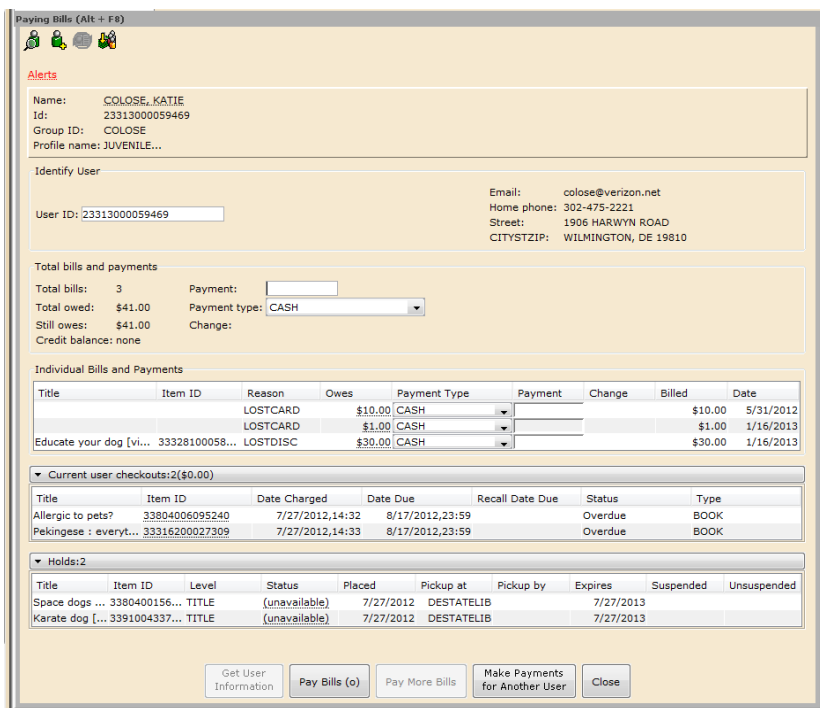
To pay a bill(s) associated with a user's record

1. On the Common Tasks toolbar, click the **Paying Bills** wizard.

2. Scan the barcode from the user's card, or type the **User ID** and tap the **Enter** key or click **Get User Information**. An alert should pop-up listing problems with the account. Click OK to close it.

3. The following window appears:

4. To pay the entire bill, type the amount in the **Payment** box. **WorkFlows applies the payments in chronological order, from the oldest bill to the most recent.**

-**OR**

To pay a specific bill, type the amount in the **Payment** box next to each specific item in the **Individual Bills and Payments** list.

5. In the **Payment type** box, make a selection. Depending on the configuration of your library, you will have several payment types to select such as

CASH
FORGIVEN - Waives all or part of a user's bill without actual payment.
CANCEL - Select this type if the bill was created in error or for too much money.

6. Click **Pay Bills**. If a patron overpays, the system automatically calculates the difference in the **Change** field. **Symphony cannot keep track of credits; you must give the patron their change!**

If the patron makes a partial payment, the balance appears.

> **NOTE**: WorkFlows allows up to 50 payments on a single bill. You can make up to 49 partial payments on a single bill; the 50th payment must pay the bill in full. If the 49th payment does not pay the bill in full, the following message appears:
>
> *Partial payment no longer accepted*
>
> With the 50th payment, the patron must pay the bill in full, or you can cancel or forgive the remaining bill amount or create a new bill using the remaining amount.

You may also take other actions on the patrons account from this screen by using the **Right-Click** menus.