Find a patron by barcode

1. On the left panel, in the **Enter barcode** field, under Assist Patrons, scan or type the barcode.
2. If you typed the barcode, click **Go** or press <Enter>.

Search for a patron

1. On the left panel, in the Search section, under Assist Patrons, select an **index** from the list.
2. In the search field, enter your search terms.
3. Click **Search** or press <Enter>.
4. Click the patron's **Name** to view their account.

Search indexes

- **Barcode** - Barcode (ID number) of the patron.
- **Everything** (default) - Contents of all fields.
- **Name** - Last name, first name, and/or initial. Note: Do not type a comma (,) if you are searching by the patron's first and last name.
- **Postal Code** - Postal code (e.g., zip code) of the patron's address.
- **Search patrons of all libraries** - Deselect the check box to search for patrons from your institution. When the check box is selected, patrons across all institutions in your group will be shown. You can only edit patrons from your institution. Note: This option only appears if you are part of a WMS group.
- **Street Address** - Address of the patron (e.g., house number, street name).

Take actions on search results

If your library is a member of a group, you can view all patrons in the group, but can edit only your library's patrons.
Patron record

Click the patron's Name to view the patron record's five sections.

Patron record sections - Table

<table>
<thead>
<tr>
<th>INDEX</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bills</td>
<td>See <a href="#">Pay, waive, refund, or cancel bills</a></td>
</tr>
<tr>
<td>Checkout</td>
<td>Check out materials and list current loans. See <a href="#">Check out items</a>.</td>
</tr>
<tr>
<td>History</td>
<td>View patron transactions listed by date. See <a href="#">History</a>.</td>
</tr>
<tr>
<td>Holds</td>
<td>Create or delete hold requests or scheduled items. See:</td>
</tr>
<tr>
<td></td>
<td>• <a href="#">Request a hold from a patron account</a></td>
</tr>
<tr>
<td></td>
<td>• <a href="#">Edit or delete hold from a patron account</a></td>
</tr>
<tr>
<td></td>
<td>• <a href="#">Schedule an item from a patron account</a></td>
</tr>
<tr>
<td>Profile</td>
<td>Update identification, contact information, system access or privileges. See <a href="#">Profile</a>.</td>
</tr>
</tbody>
</table>

Checkout

Includes Account Overview (totals for loans, overdue items, and holds), balance for unpaid bills, an item scanning area, and a list of items currently checked out.

Use the Checkout screen to check out materials to the patron.

See [Check out](#) for more information.

Account Overview sections - Table

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checked out items</td>
<td>List of items checked out (includes items checked out to proxy patrons). For information on how to check out items, see <a href="#">Check out</a>.</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>The Expiration Date determines when circulation privileges expire. The patron's circulation privileges will expire on the date entered at 11:59:59 PM.</td>
</tr>
<tr>
<td>SECTION</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Holds to be picked up</td>
<td>Links to Holds tab</td>
</tr>
<tr>
<td>Home Branch</td>
<td>Patron's preferred library branch</td>
</tr>
<tr>
<td>Last Activity</td>
<td>The last date of patron activity. Actions that update the last activity date: check out, check in, renew, create hold request, pickup hold, create item schedule/booking, pay bill, and SIP2 authentication.</td>
</tr>
<tr>
<td>Notes</td>
<td>A note written by library staff about the patron. See Profile, below, for details on writing notes.</td>
</tr>
<tr>
<td>Outstanding bills</td>
<td>Total amount of any unpaid bills, fines, fees, etc. Amounts link to Bills tab.</td>
</tr>
<tr>
<td>Overdue</td>
<td>Number of overdue items</td>
</tr>
<tr>
<td>Patron Type</td>
<td>The kind of account the patron has (student, faculty, child, adult, etc.)</td>
</tr>
</tbody>
</table>

**Holds**

Provides information on hold requests and scheduled items.

**Holds sections - Table**

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holds</td>
<td>Lists hold requests and allows creating and deleting holds</td>
</tr>
<tr>
<td>Scheduled Items</td>
<td>Lists scheduled items and allows creating and deleting scheduled items</td>
</tr>
</tbody>
</table>

See:

- [Request a hold from a patron account](https://help.oclc.org/Library_Management/WorldShare_Circulation/Patron_management/010Patron_record_details)
- [Edit or delete hold from a patron account](https://help.oclc.org/Library_Management/WorldShare_Circulation/Patron_management/010Patron_record_details)
- [Schedule an item from a patron account](https://help.oclc.org/Library_Management/WorldShare_Circulation/Patron_management/010Patron_record_details)

**Bills**

Provides information on outstanding bills for fines and fees, and account history that lists paid/ waived/refunded fines and
Bills sections - Table

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Lists outstanding bills.</td>
</tr>
<tr>
<td>Account History</td>
<td>Record of paid, waived, or refunded bills. For more information about a transaction, in the Reason column, click See Pay, waive, refund, or cancel bills.</td>
</tr>
</tbody>
</table>
Staff and public notes can display in a pop-up by typing an exclamation mark (!) at the beginning of a note. Pop-up notes will display when the patron account is initially accessed.

History

See Patron history.

Watch a video

Patron Records Overview (5:24)

This video is an overview of the information in patron records.

Media, iframe, embed and object tags are not supported inside of a PDF.