



Creating a New Patron Record

Login to MassCat with your username and password:

Username:

Password:

Login »

Click on the "Patrons" link to access the new patron creation form:

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Information for Filling Holds and ILL Requests
If you need information on whether or not a library is on the delivery system and how to address the delivery slip or if you need to contact another MassCat library regarding a request, use the following link to find a list of library names, contact names, email addresses, delivery system status and mailing addresses: <http://www.masscat.org/links/illinfo.htm>
Remember, not all MassCat members are on the statewide delivery system so please do not assume that an item you need to send to another library should be sent using delivery.
To determine whether another library is on the

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Click on the "New Patron" button to access a list of new patron entry forms by patron type:

+ New patron ▼

Browse by last name: A B C D E F G

Choose the type of patron you would like to create from the list of patron type options:



You will be taken to a data entry form. Fill in the fields of information you wish to collect about this patron. You do not need to fill in every box, but at a minimum, you must fill in the required fields (first name and last name) which are marked in red.

We recommend entering at least a first and last name as well as the barcode number for the patron. You should also enter an email address for each patron (if available). This will allow the system to email overdue notices as well as warning notices about items that are about to become due or overdue.

We also recommend setting a username and password for each patron. The username and password will enable patrons to login to the OPAC and take advantage of several features such as:

- reviewing their checked out items to see when they are due
- keeping apprised of their overdue fines (if your library charges fines)
- maintaining booklists and virtual book shelves of items they have read (or movies they have watched), items they wish to read (or movies they wish to watch), etc.
- changing their password

We also recommend setting patrons up with email notices other than the overdue notice that the system sends automatically. These notice settings can be found in the section at the bottom of the form called, "Patron messaging preferences."

	Days in advance	Email	Digests only?	Do not notify
Unknown	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Unknown	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Unknown	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Item due	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advance notice	0 ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item checkout	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Hold filled	-	<input type="checkbox"/>	-	<input type="checkbox"/>
Item check-in	-	<input type="checkbox"/>	-	<input type="checkbox"/>

Save Cancel

The "Advance notice" will send patrons a notice reminding them that their library item is coming due. You set the number of days in advance that you would like the notice to be sent by clicking on the arrow next to the number 0 and choosing a number of days from the list.

The "Hold filled" notice will let patrons know when a hold request that they have placed has arrived at the library and is ready for pickup.

When you are finished entering data, click on the "Save" button at the bottom of the form:

Item check-in -

Save Cancel

You will then be taken into the details of the record for your newly created patron. If you wish to check items out to this new patron, you may do so here.