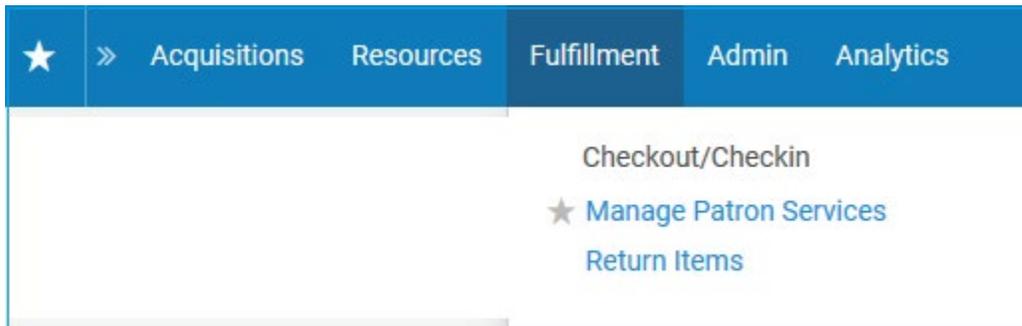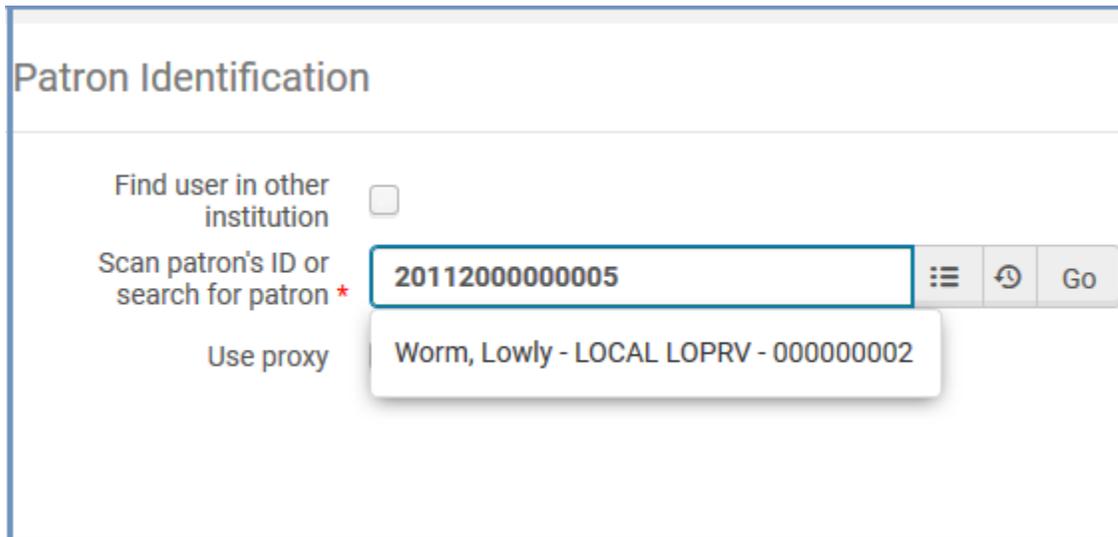**Editing Patron Accounts**

Documentation by Joanne Miller, University of Illinois – Urbana-Champaign

Alma video: [Day-to-Day User Management](#)

!. Go to "Fulfillment" and select "Manage Patron Services"
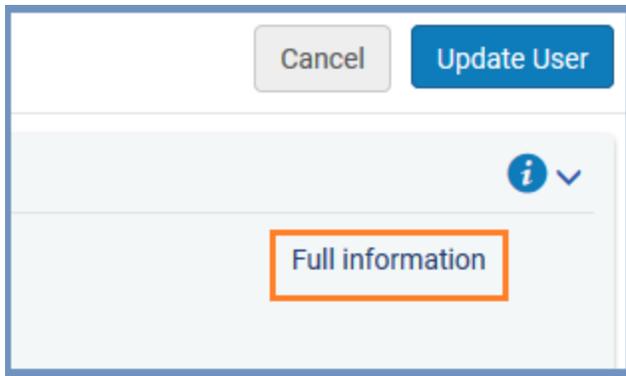

2. Look the patron up by barcode in the search box.

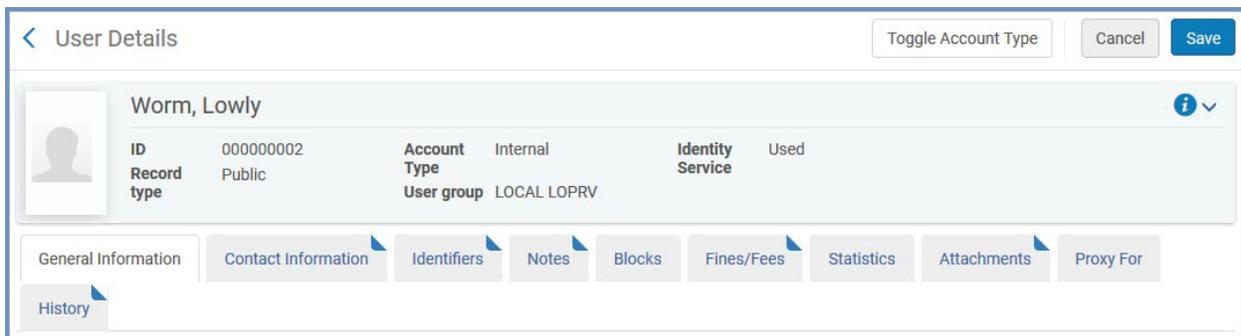3. Click on the "Edit User" button at the top of the patron screen.

4. This will display the Quick User Management page where changes can be made to existing general information: patron name, primary identifier, user group, expiration date, purge date, and password management for Primo. Contact information may also be edited here: email address, address, and phone number. Note: only the 'Preferred' contact information appears on this page.

5. If changes are made to the information on this page, click "Update User" on the right side of the screen at the top.
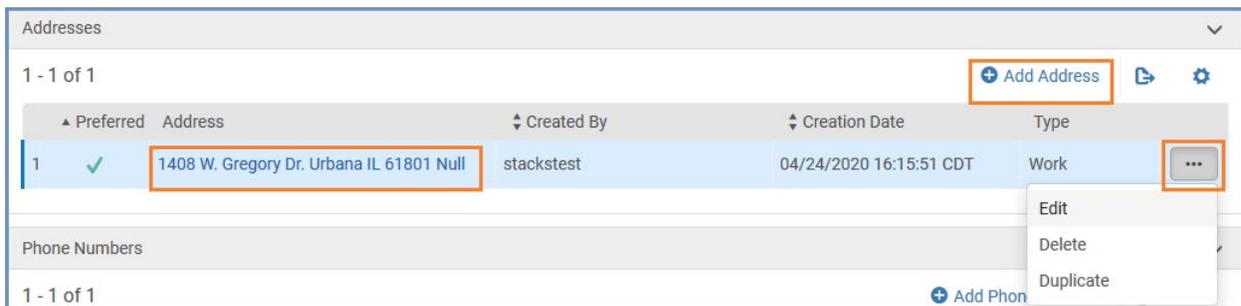

6. If no changes need to be made on the Quick User Management page, click the 'Full information' link at the top right side of the page for more options to edit, add, or delete patron information.

6. The User Details screen displays tabs of categories which can be edited. The screen automatically opens with the "General Information" tab which shows the patron's user information as on the previous page, but the contact information is now in a separate tab. Click on the "Contact Information" tab to edit the address, email address, or phone number. For each category, there is the option to edit the current contact information or enter secondary contact information.

7. The current address may be edited by either clicking on the highlighted address on the left or by clicking on the ellipsis to the right which gives the option to edit, delete, or duplicate the address. To add a second address, click on "Add Address" on the right side.

8. By default, the new address will be a secondary address. Click "yes" at the lower left if you wish to make it the Preferred address. Click "Save" at the top right side after changes are made.

9. To add the current patron as a proxy borrower for another patron, click the "Proxy for" tab and click "Add Proxy For" at the right.

10. Look up the authorizing patron by entering the patron's barcode. Click the "Add User" button.

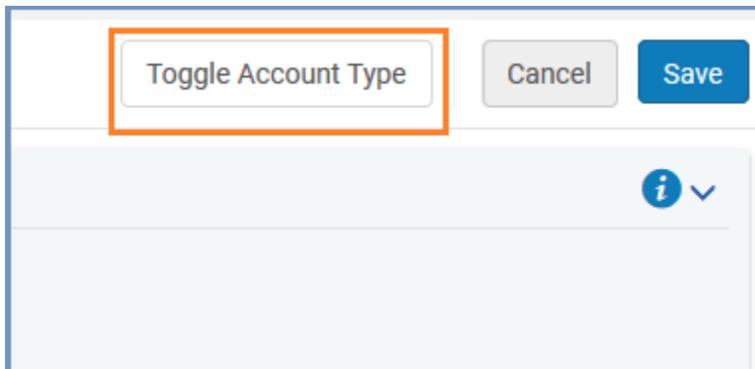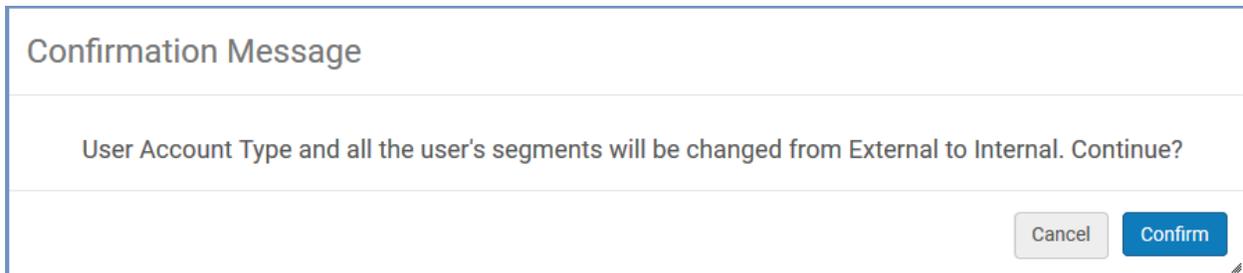11. The proxy relationship is now in place. Click the "Save" button at the top. (A pop-up note with proxy information may also be added to the patron's account by clicking on the "Notes" tab to add a new note.)

12. If updating a patron's record from an external to an internal account or vice versa, click on the "Toggle Account Type" button at the top right side of the screen.

13. When changing an account from external to internal, the password management option for Primo will become available and you will be able to edit the user's details. Click "Confirm" if you wish to proceed.

14. When changing an account from internal to external, the password option for Primo will be removed and you will no longer be able to edit the user's details. Click "Confirm" if you wish to proceed.

Confirmation Message

User Account Type and all the user's segments will be changed from Internal to External and the password will be removed . Continue?

Cancel Confirm

15. Click the "Save" button at the upper right corner of the screen when finished.