Active and Inactive Status

Active/Inactive was discussed with RA on 8/26/2019 and UM on 8/28/2019. The consensus was that it was desirable to have active/inactive, but at this time, we have not developed concrete use cases that merit working on it as part of the MVP process.

So the UM SIG would like to have the buggy behavior addressed (UIU-913) and set it so that patrons can either be inactive / expired, active / unexpired, or active / no expiration date.

This effectively makes the active/inactive state mirror expired/unexpired, until further development can be done.

UPDATE 3/3/2021 BY USER'S PO PATTY WANNINGER

I edited the notes below and they reflect how the Active/Inactive status is currently working. An Active user can be Inactivated via the UI whether or not they have an expiration date in the future or no expiration date. Inactivating a user through the UI does not affect the Expiration date.

Otherwise it is the Expiration date that makes a User "Inactive." To re-activate a user, you have to extend the Expiration date.

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Patron records have expiration dates, but also active / inactive values. We want to have clear documentation / expectations about how this functions and what we expect to happen for accounts that exist in one of the four states.

Use cases:
- Patron has lost a card or wants access temporarily suspended for some reason.
- Seasonal / temporary staff (who may come in through the bulk loader, or may be manually added)
- Operator login to the system should be disabled

<table>
<thead>
<tr>
<th>Expiration Date</th>
<th>Active / Inactive Status</th>
<th>Inactive Status</th>
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</table>
| In the Past (Account Expired)    | Can't be active                                              | • Patrons cannot check out an item
|                                  |                                                              | • Patrons cannot renew an item
|                                  |                                                              | • Patrons cannot request a hold, page, or recall
|                                  |                                                              | • Notices continue per normal policy.
|                                  |                                                              | • Open fines continue to be reported to the Bursar per library policy
|                                  |                                                              | • Account appears in Patron Purge function / is eligible to be purged           |
| In the Future / No Value (Account Not Expired) | Patron can get all services they are entitled to at the library, by patron group or other library policy. This is normal functioning for active library users. | • Patrons cannot check out an item.
|                                  |                                                              | • Patrons cannot renew an item (staff can override)
|                                  |                                                              | • Patrons cannot request a hold, page, or recall
|                                  |                                                              | • Notices continue per normal policy.
|                                  |                                                              | • Open fines continue to be reported to the Bursar per library policy.
|                                  |                                                              | • Account does not appear in Patron Purge function / is not eligible to be purged
|                                  |                                                              | • Operator Login to FOLIO is disabled.
|                                  |                                                              | Q: What information continues to be updated by bulk load? What information should NOT be updated on the record? |