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Change Patron Information

From Tools, open Utilities, and select the Patrons category.

Let's say your policies are based on grades. You've just advanced your patron grades, and you need to update the policies to reflect those changes.

For this we'll use the Change Patron Policy utility.

Under Selections, fill in the Patrons in Level. Let's start with the new 6th-graders, who are currently on the Elementary school policy, but are now at the Middle school.

So let's choose which policy to change *to*. Under Options, change the drop-down menu to, in this case, Middle Student.

Click on Run.

Confirm the number of records to modify, and when the utility is finished, view the summary from Operation Management.

Then you would go back and change the next set of patrons, so on until the patrons are on their correct policies.