GUIDELINES FOR PATRON REGISTRATION IN THE SHARED 4CLS DATABASE
September 2013

It is important that all patron records are uniform to avoid confusing busy circulation staff.

Patron information is used for printing overdue notices, so it must be clear, accurate, and complete.

REGISTRATION:
A patron may register at any online library, but it certainly makes sense for them to register at their local library. The library card is good at any of the online libraries, regardless of which online library issued the card. Be aware that some libraries alter the procedures a bit for out-of-system borrowers.

The registration record will be shared by all of the online libraries.

The registering library will:
- Request appropriate proof of name and address from a patron.
- Thoroughly search the database to avoid entering a duplicate record.
- Enter information in all of the fields for the Minimum Record – first name, last name, street name and number and/or PO Box, city, state, zip code.
- Enter additional information at the library's discretion – patron's middle name or initial to differentiate between patrons with the same first and last name, employer name, address and phone number, date of birth, first and last name of parent or guardian of a juvenile.
- Input the patron information and issue a library card.

INPUT SPECIFICATIONS:
- Use standard capitalization
- Punctuation – Do not use periods at the end of abbreviations
- Abbreviations:
  >Title: Mr, Mrs, Ms, Miss, Dr, Rev,
  >Suffix: Jr, Sr, Esq, I, II, III
  >Company Name: Inc, Co, Ltd, Bros
  >Street: Hwy, Cnty, St, Ave, Rd, Dr, La, Cir, Apt, Blvd, PO Box, Ter, Pl, Hts, TrPk, N, E, S, W, NE, NW, SE, SW (abbreviate N, S, E, W, if it serves as a qualifier, not if the word is an integral part of the street name). ST is used for State, as in ST Hwy.

MAINTENANCE:
- Update any patron's record after they show proof of change of name or address.
- Do not delete a patron record created at another library – contact that library.
- Any library can replace any patron's lost card after seeing ID.
- When a patron moves and starts using another online library on a regular basis, it would be helpful statistically to change the registration qualifier. Fields indicating agency (library) must be changed, too.
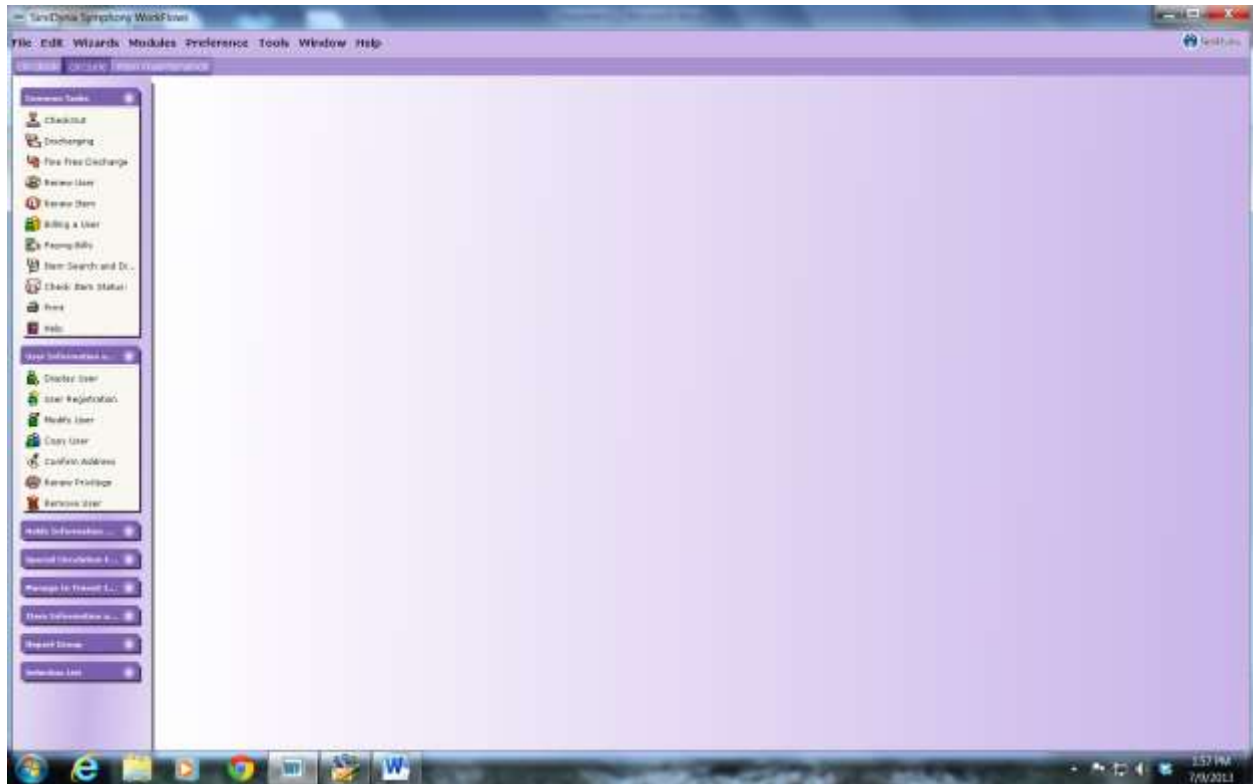
When registering a patron, always check to make sure they do not already have a card first. Search in Display User by last name, as they may or may not have used a middle name or initial.

Be very careful to enter data correctly. Use standard capitalization and correct abbreviations. No punctuation.

To Register a Borrower, go to the User Registration wizard and click on it. A dialog box to enter the barcode for the patron card will appear. You may wand in the card number with your barcode reader.
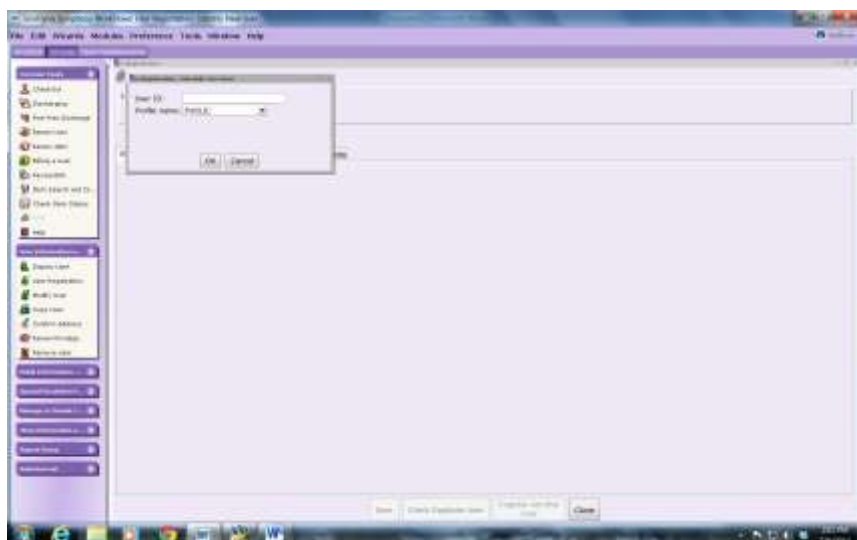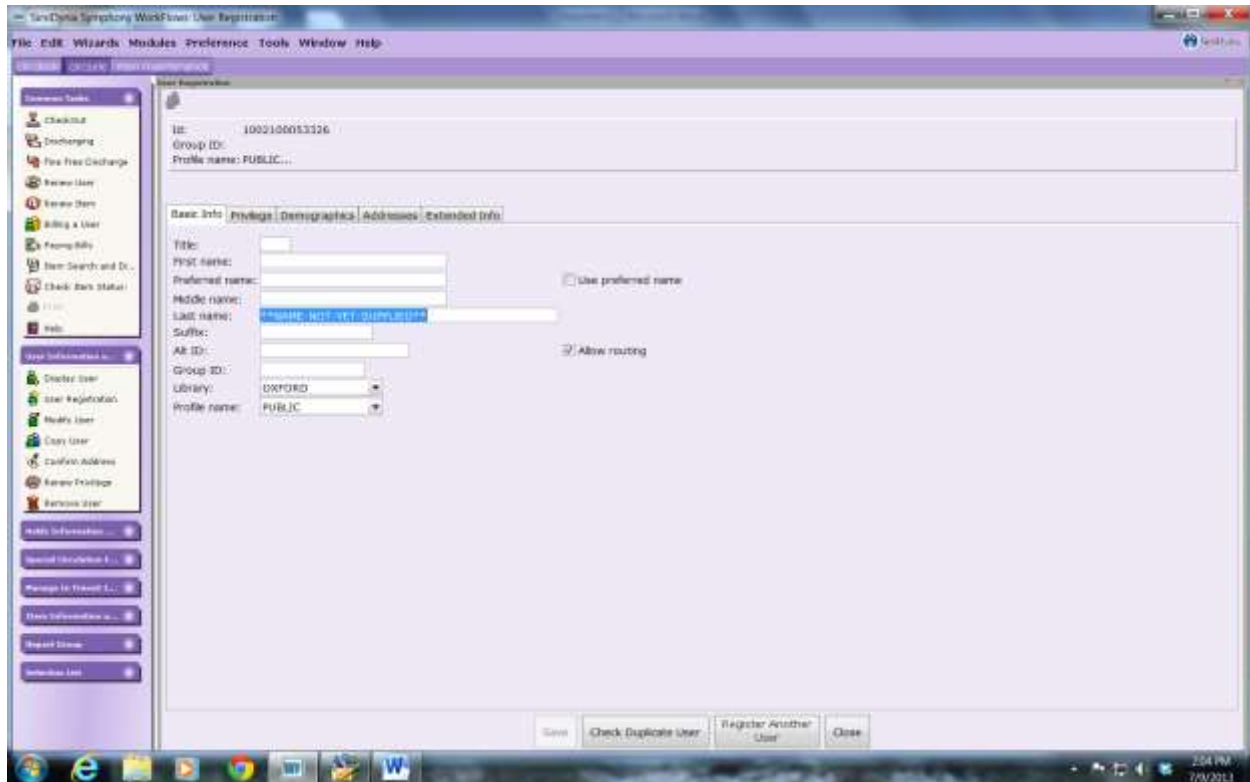
This is the screen you will see after entering the new card.

Title: Mr, Mrs, Ms, Miss, Dr or Rev are examples of titles. This field has been optional but may also be useful to indicate the gender of adults.

First Name: Enter person's first name.   This needs to be their legal name, no nicknames.

Preferred Name: If they have a preferred name other than their legal given name, that can be entered here.

Middle Name: This is good to have, as it helps when searching for duplications.

Last Name: Enter the patron's last name here.

Suffix: Would be Jr or Sr or III.

Alt ID: This is what is used as their ID. You may use their driver's license or whatever type of valid ID your library deems appropriate. Some libraries enter the last four digits of a patron's driver's license number in the format NYDL #### to help sort out duplicate names. If you opt to use the driver's license in the Alt ID field, enter the entire number with no dashes or spaces. If the driver's license presented is out-of-state, indicate PA, NJ, NY etc. (useful if people have a second home in our communities or haven't changed their ID yet). Never enter their social security number in this field (if SS is used, enter only last four digits). Be very careful what you do enter for security purposes. This field is searchable and can be used to display all users associated with that ID.

Group ID: This may be used if they are part of a particular group, such as a nursing home or day care facility. This field is also searchable, as noted above.

Library: This defaults to the member library creating the record.

Profile: Default set at Public, but there are other options, e.g., organization, staff etc.

Next Click on the Privilege Tab at the top of the screen.
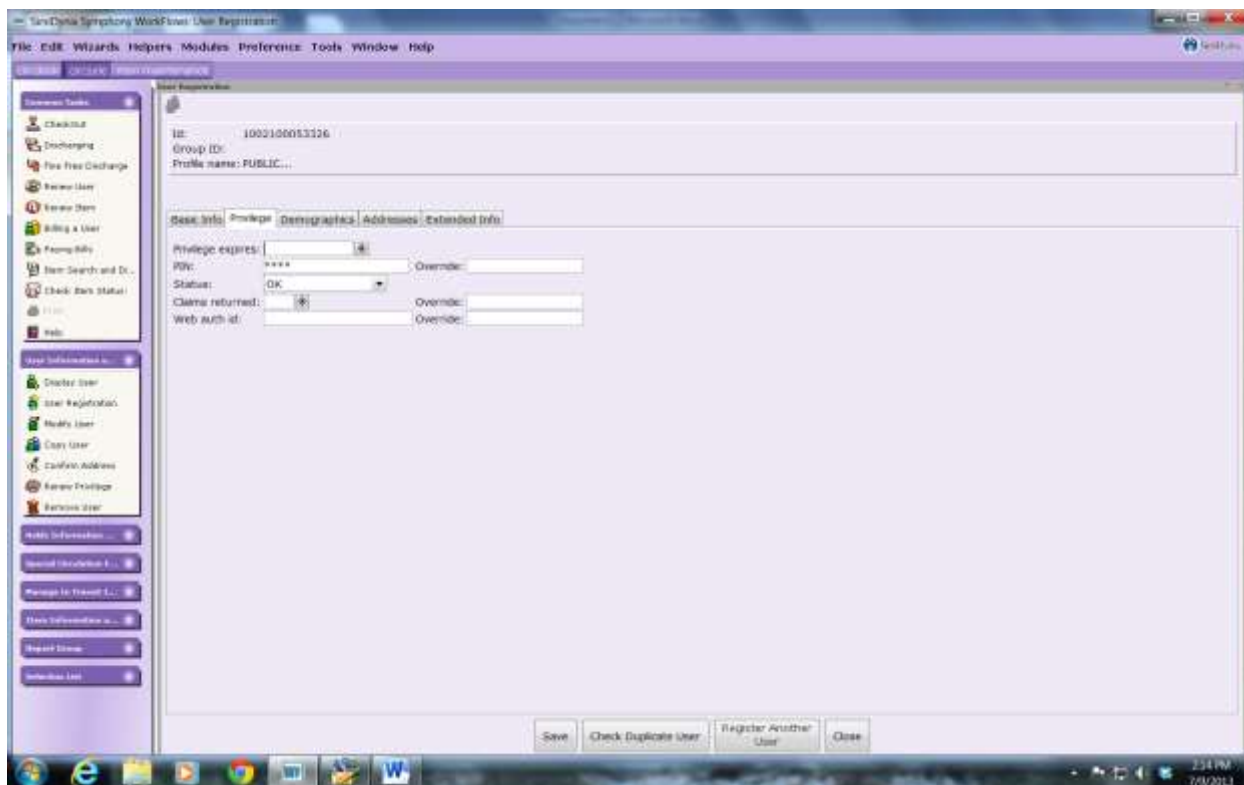
Privilege expires: This is where you enter the date of card expiration. The default expiration date for the system is three (3) years. You can change it by typing in a date such as 7/10/2013, or you can click on the little button to the right of the space, and a calendar will open. Another option is NEVER.

PIN: You will need to enter a new personal identification number (PIN) and do the override (super). Then the patron can log in from home and change it. Most libraries use the last 4 digits of the patron's phone number.

The other spaces on this page normally do not apply to a new patron. If at some point a patron claims to have returned materials, and it is marked on his record, it will show up here. If that needs to be cleared, you can clear the number in the Claims Returned space and do the Override.

Next Click on the Demographic Tab.
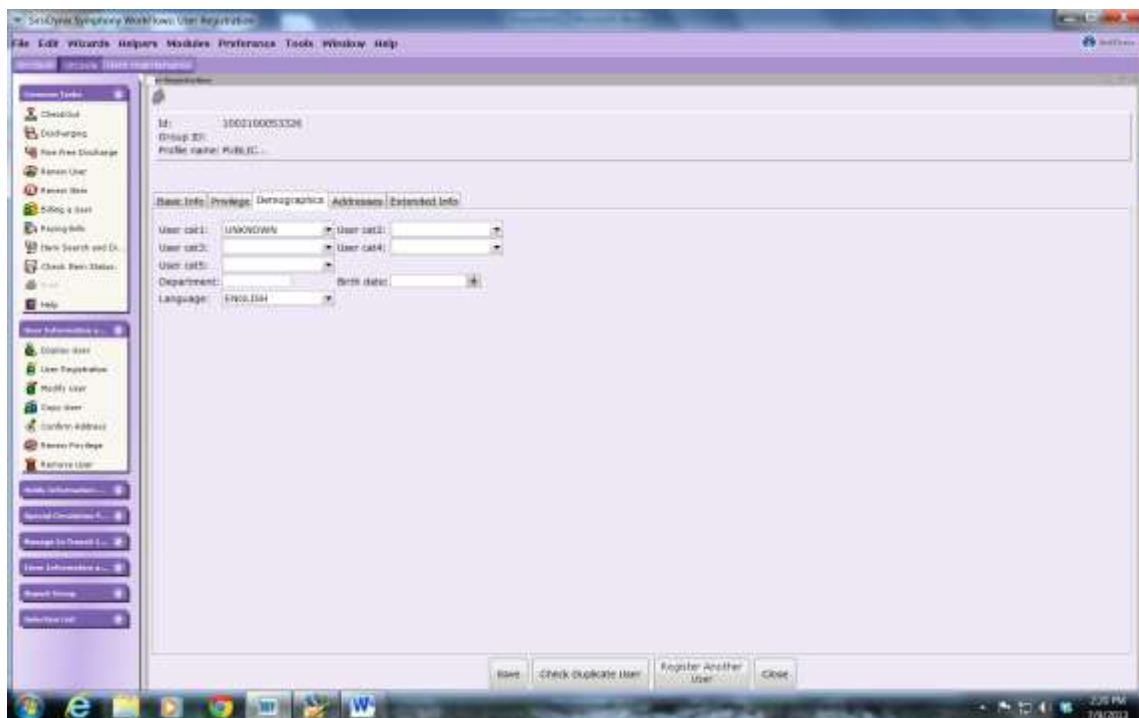
User Cat: Is generally defaulted to Unknown, but it is important to change this to proper classification, i.e., Adult, YA, Juvenile, etc.
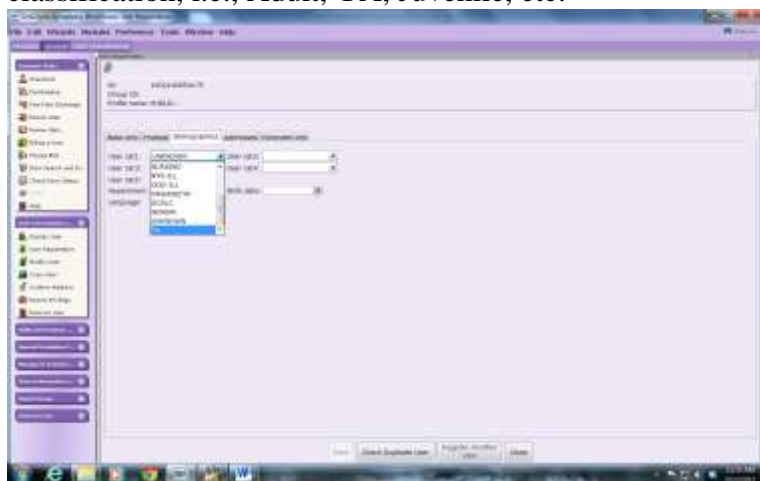
User Category 1 Field Options:

Name	Description	Name	Description
UNKNOWN	Unknown	NYS_ILL*	New York State ILL Libraries
ADULT	Adult users	OOS-ILL*	Out-of-State ILL Libraries
JUVENILE	Juvenile users	SRCL	South Central Libraries
YA	Young Adult users	DAYCARE	Day Care users
SENIOR	Senior (65+) users	NURSING	Nursing Home users

*used primarily by 4CLS ILL

User Cat 2: Depending on how your library wishes to keep track of your patrons, it may be as simple as Resident or Nresident, or you may enter what Town or County. Review the options offered. For example, Oxford is a school district library chartered to serve the Oxford Central School District, so if a patron lives in the district, staff use Oxford (Resident would also work),
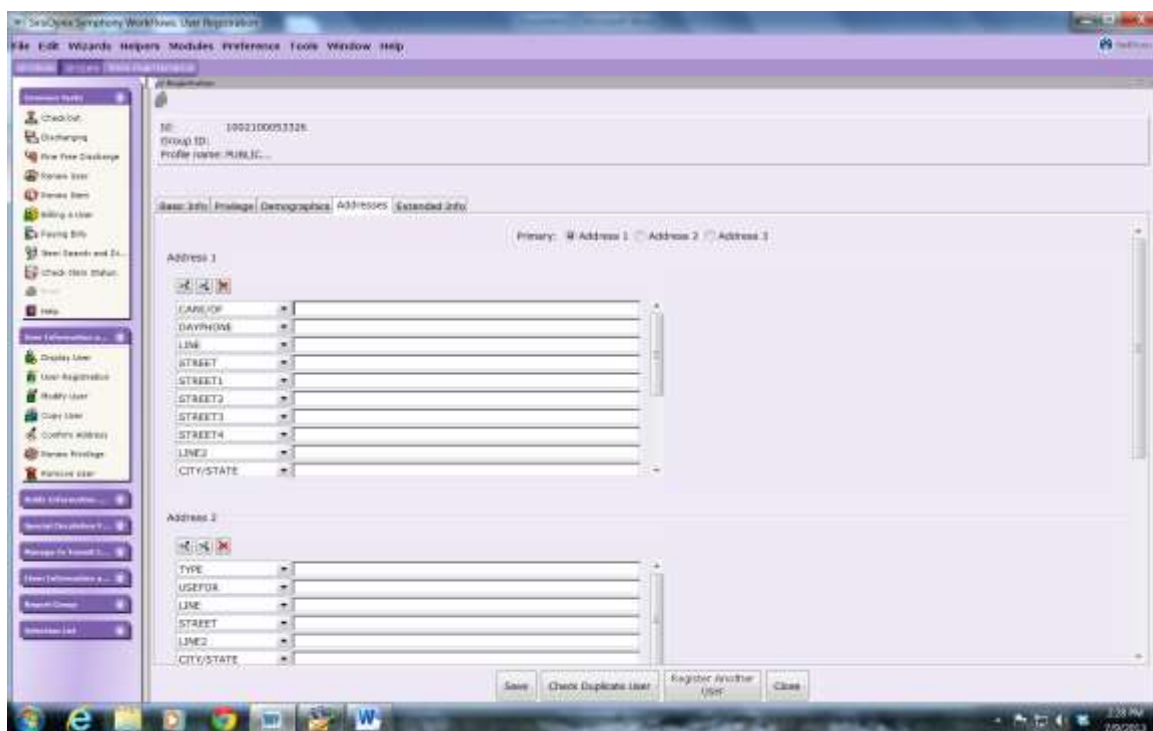
and if they do not live in the school district they use NRESIDENT. Many libraries use township.

User Cat 3,4, & 5 are currently not being used.

Birth Date: This is where we enter patron's birth date. This also helps in determining if the patron is a duplicate or not. Some libraries do not use this entry.

Language: defaults to English.

Next Click on ADDRESSES at the top of the page

Use Standard capitalization; do not use periods at the end of abbreviations.

Address 1 is the checked by default but for Primary, but double check to make sure.

Address 1 is used for the patron's primary or local address.

Address 2 is used if patron has another address. For example, they may have a local summer residence here, but a permanent address on Long Island. The Long Island address would go in Address 2.

Address 3 is basically used for ename(employer) or pname(parent or guardian of a child).

Care/of: Use for parent/guardian name if it is a J or YA registration and the adult wishes to receive the child's overdue notices.

Dayphone: Do not use.   If a book shows on hold for someone when discharged or routed in and the phone number is entered here it will not show up with the patron information.

For the patron's address, focus on Street and Line and ignore Streets 1-4, especially since they are not searchable in WorkFlows. Only Street should be used.

Street: The patron's mailing address needs to go in the STREET line, even if it is a PO Box. It is important that the address print out correctly on the overdues.

Line: If you have both a PO Box and the street number and name, enter the PO in LINE and the street address in STREET. Remember, more information is better.

City/State: This is where you would enter the name of the city and state, e.g., Oxford, NY
Note the scroll bar on the right. You will probably have to scroll down to enter more information.

Zip: Enter zip code on this line.

PHONE: Entries for phone numbers use dots instead of dashes. Be sure to include the area code, e.g., 607.843.6146

EMAIL: Optional, but you will need to use this if the patron is to be alerted to holds and overdues via email.

COUNTY: Use the county code: 007 Broome; 017 Chenango; 025 Delaware; 077 Otsego
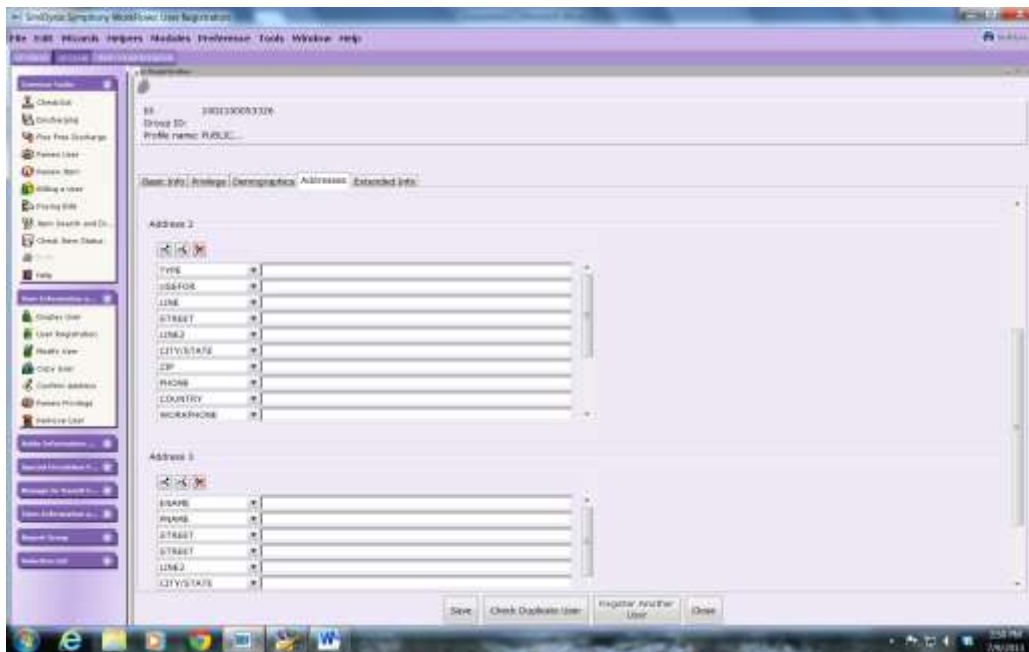
Address 2 is where you input all of the patron's permanent address if different from the local Address 1.

Address 3: ENAME is where you would enter employer information if you have it.
PNAME is where you would enter the parent or guardian name for a juvenile.

You are now ready to click on CHECK DUPLICATE USER at the bottom of the page.

If you have any information for EXTENED INFO, enter that now and then click on CHECK DUPLICATE USER. For example, at Oxford, if a patron gets a library card and computer orientation at the same time, staff go to Extended Info and put a (OX_PC) in the NOTES field. The Extended Info field is used to notify staff of an issue requiring their attention. Be very careful about what you put in the notes field – nothing too personal or explicit.

Once you click on CHECK DUPLICATE USER and it tells you No Duplicate User is found, then click on SAVE. If a list of duplicates pops up, check carefully; it may pick up the same street or phone number and still not be the same person. Once it is determined there are no duplicates, click on Save. If it turns out that patron is already in the system, and you did not catch it on your preliminary search, you will need to take proper action, as they can NOT have two cards in the system. The other card may be marked lost, or you may update the information in that record and not enter the new one.

Once the patron is registered and saved, you will note the option box to:
Register another user
Make more changes
Clone/Copy to New User: (this option may be handy when registering several family members.
Close