

# **Patron Information**

## **INPUT STANDARDS PATRON REGISTRATION**

1. When a patron applies for a library card, check for a pre-existing patron account using the following methods in this order:
  - a. Search by name using the patron's last name, comma and first three letters of the first name. Confirm results using date of birth.
  - b. Search using privacy-protected format of driver's license number. Confirm results using date of birth. Entering the Full driver's license will not retrieve patron account; must enter the last four digits of the ID. Koha will search for other IDs so long as the format includes the privacy format.
  - c. Search using patron's date of birth.

## **BARCODE**

1. New patrons – scan account number from library card.
2. Existing patrons – If a pre-existing account for a patron is located do not assign a new barcode. See “Replacement Library Cards”.

## **REPLACEMENT LIBRARY CARDS**

No agency charges replacement fees for normal wear and tear or for name changes. Some agencies may charge for a replacement card if the patron has lost or misplaced a card. An ID is required to replace a library card.

If a patron is currently registered at your library and wishes to have the card replaced, assign a new barcode. For Best Practice, the barcode prefix and registered library should match.

If a patron is not currently registered at your library and wishes to have the card replaced, confirm the patron wants to change their registered library. If necessary, update all fields and add new barcode.

1. If the patron wishes to change libraries – assign a new barcode and change the registered library. The barcode prefix and library should match. Online digital accounts may also need to be updated or deleted.
2. If the patron does not wish to change libraries – follow best practices at your location to allow checkout and have the patron follow up at their registered library to obtain a new card.
3. The patron's previous barcode should be noted in the Previous Barcode field. This allows staff to verify the previous barcode when troubleshooting e-material issues (Overdrive, Hoopla, etc.).

## **SCANNER – PATRON ENTRY**

A patron can be registered by scanning a driver's license. All information in the patron record is entered with ALL Caps in this instance. You do not need to change the entry to standards as below (re. Capitalization of first letter only). Please confirm the information on the license is correct.

## LAST NAME

Legal last name printed on identification. First letter capitalized. Names with punctuation or spaces should be entered exactly as seen on the ID.

| RULE  | EXAMPLE   |
|---|---|
| Enter exactly as spelled on the ID, omitting diacritical marks.   | ID: Laurence Quarri<br><b>Last name:</b> Quarri   |
| If the last name consists of more than one name, enter all parts in the Last name field exactly as ID has it printed. | ID: John Van Duzer<br><b>Last name:</b> Van Duzer<br><br>ID: James Madison-Park<br><b>Last name:</b> Madison-Park<br><br>ID: Roberto Gonzales Chavez<br><b>Last Name:</b> Chavez<br><br>ID: Toby O'Connor<br><b>Last name:</b> O'Connor |
| If "Jr" or any other addition appears as a part of the last name, enter it in the Last Name field.                    | ID: Eli Jackson Jr<br><b>Last name:</b> Jackson<br><br>ID: John Jones III<br><b>Last name:</b> Jones  |

## FIRST NAME

Legal first name printed on identification (do not use nickname or abbreviations). First letter capitalized. Optional 'Legal name if different' field available for patrons who use names other than their legal names for patron account.

| RULE  | EXAMPLE  |
|---|--|
| Enter exactly as spelled on ID.   | ID: Tommy Smith<br><b>First name:</b> Tommy  |
| If the first name is hyphenated, enter both names in the First name field exactly as printed on ID. | ID: Mary-Jane Jones<br><b>First name:</b> Mary-Jane<br><br>ID: Jean-Pierre Smith<br><b>First name:</b> Jean-Pierre |

## MIDDLE NAME

Middle name (initial if full name unavailable). Enter in Initials field of patron registration.

| RULE   | EXAMPLE   |
|--|---|
| Enter the whole middle name as spelled   | ID: John Quincy Adams<br><b>Middle name:</b> Quincy |
| If only a middle initial is available, enter that in the <b>Middle name</b> field. | ID: Lou Q. Stewart<br><b>Middle name:</b> Q         |

|  |   |
|--|---|
| Do <b>not</b> type a period.                           |   |
| If more than one middle name is given, enter them all. | ID: John Francis Xavier Smith<br><b>Middle name:</b> Francis Xavier |

## LIBRARY

New patrons – automatically set in patron registration wordform using the library location where the card is being created (barcode prefix matches branch).

Existing patrons – If a patron has moved or wishes to change their registered library the registered library should match the barcode prefix so the card may need to be replaced. See “Replacement Library Cards” to allow checkout.

## PATRON CODE

Select the appropriate patron type. Not all jurisdictions use the same codes.

| PATRON TYPE   | EXPIRATION LIMIT |
|---------------|------------------|
| Adult         | 48 months        |
| Foster        | 12 months        |
| Homebound     | 48 months        |
| Institution   | 48 months        |
| Juvenile      | 48 months        |
| Teen          | 48 months        |
| Visitor       | 3 months         |
| Welcome       | 3 months         |
| Welcome Child | 3 months         |

## ADDRESS

A valid home address is required for all patrons except for “Welcome”. State law requires that patrons receive written notices before being sent to collections.

**It is imperative we have a valid address.**

To add an address, use the Main Address field (or Alternate Address if adding multiple addresses). If entering a second address, list the mailing or local address in the Main Address section. If mailing address and physical address are different, enter both.

Enter zip code, city, and state.

|   |  |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
|---|--|-----|--------|-----|-----------|------|----------|------|--------|-----|---------|-----|------|----|-------|----|------|----|------|----|--------|----|-------|-----|--|
| <p><b>RULE</b><br/>Enter the street address and apartment number (if applicable), or PO box number.</p> <p>Use the following abbreviations:</p>   | <p><b>Example</b></p>  |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| <table border="0"> <tr><td>Apartment</td><td>Apt</td></tr> <tr><td>Avenue</td><td>Ave</td></tr> <tr><td>Boulevard</td><td>Blvd</td></tr> <tr><td>Building</td><td>Bldg</td></tr> <tr><td>Circle</td><td>Cir</td></tr> <tr><td>Highway</td><td>Hwy</td></tr> <tr><td>Lane</td><td>Ln</td></tr> <tr><td>Place</td><td>Pl</td></tr> <tr><td>Road</td><td>Rd</td></tr> <tr><td>Room</td><td>Rm</td></tr> <tr><td>Street</td><td>St</td></tr> <tr><td>Suite</td><td>Ste</td></tr> </table> | Apartment  | Apt | Avenue | Ave | Boulevard | Blvd | Building | Bldg | Circle | Cir | Highway | Hwy | Lane | Ln | Place | Pl | Road | Rd | Room | Rm | Street | St | Suite | Ste | <p><b>Address:</b> 15 Main St</p> <p><b>Address:</b> 123 W 45 St Apt 67</p> <p><b>Address:</b> 89 Grand Ave Ste 10</p> <p><b>Address:</b> PO Box 333</p> |
| Apartment   | Apt  |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Avenue  | Ave  |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Boulevard   | Blvd   |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Building  | Bldg   |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Circle  | Cir  |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Highway   | Hwy  |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Lane  | Ln   |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Place   | Pl   |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Road  | Rd   |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Room  | Rm   |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Street  | St   |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| Suite   | Ste  |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |
| <p>If a street address includes a compass direction, use N, S, E, W, NE, NW, SE, or SW</p> <p>If a street name is a numbered street, use the cardinal number only, (without the “-st”, “-nd”, “-rd”, “-th”)</p>   | <p><b>Address:</b> W Main St Apt 4B</p> <p><b>Address:</b> 1200 Parks Ave NW</p> <p><b>Address:</b> 13 E 67 St</p> |     |        |     |           |      |          |      |        |     |         |     |      |    |       |    |      |    |      |    |        |    |       |     |  |

## TELEPHONE/EMAIL, ETC.

Enter as appropriate. Set notification option according to patron’s choice. Not required fields in Koha.

| <b>RULE</b>   | <b>EXAMPLE</b>   |
|---|--|
| <p>Enter the number in the Primary phone field.</p> <p>If a second number has been provided, enter it in the Secondary phone field.</p> | <p style="text-align: center;">Telephone #: 805-777-7777</p> |

## PHONE FIELD ENTRY GUIDELINES

“Primary phone” is a mandatory field in the current automated system. For patrons who do not have a telephone, or refuse to give a telephone number, as of November 17, 2010, the agreed upon standard for this field on the patron registration screen is “none” or “refused” (no note in the patron record).

If a patron refuses to give either an email address or a telephone number, the staff member should put an agreed upon staff email address in the email field. Failure to do so will result in a patron account with fees/fines over \$50 going to Collections without any prior notice, or not going to Collections at all if the notice cycle cannot begin/complete.

Email or telephone notification is required for the notice cycle to begin. Telephone overdue notices that are not completed (answered) will receive a print bill notice after 30 days.

## TELEPHONE INPUT STANDARDS FORMAT

The acceptable format for telephone numbers for automated calling is:

1- AAA-PPP-NNNN. "AAA" is area code, "PPP" is prefix, "NNNN" is number.

Some general rules:

- Format applies to all telephone fields in the record.
  
- Only one telephone number per field (not "PPP-NNNN or PPP-NNNN" in the same line)
- The iTiva system can only call a direct number. If the phone number contains any of the following, it cannot be used:
  - An extension number.
  - A work number that needs to go through a switchboard.
  - A call blocking service access number such as \*82
  -
- Words in the telephone number are acceptable as the iTiva system ignores them. Examples: parents' home, work, cell.
- **Do not enter any symbols such as # or \*.**
- Do not use a contiguous set of numbers such as 1111111 or 999. This could result in the automated system dialing 9-1-1 as it uses dialing formats to reach outside lines.

## PASSWORD

Will default overnight to the last four digits of phone number if nothing is entered. If no phone number is entered, default to '1234'.

## PREVIOUS BARCODE

If the patron is replacing their card rather than creating a new account, copy and paste the former account number into this field. In Koha, this is not a searchable field.

## DATE OF BIRTH

Enter the date of birth, which is required, in the (MM/DD/YYYY) format. If the patron refuses to provide the year of birth, enter the birth year as 01-01-1900.

## UNIQUE ID

Enter the last four digits of the ID number, followed by the type of ID in this order:

### Driver's License

1. Enter the last four digits of the number, followed by a space.
2. Enter the abbreviation of the issuing state, followed by **DL** to denote Driver's License, (with the exception of California which would be entered as CDL). Do not place a space between the two (i.e. AZDL, not AZ DL).

**9760 CDL                      1721 WADL**

### State ID

Follow the same entry procedure as Driver's License; use **ID** to denote identification.

**9760 CID**

### Military ID

1. Enter the last four digits of the number, followed by a space, then **MLID**

**0628 MLID**

### Alien Resident Number

1. Enter the last four digits of the number, followed by a space
2. Enter **INSID** (Immigration & Naturalization Identification) and the issuing country.

**0497 INSID Mexico**

### Passport Number

1. Enter the last four digits of the number, followed by a space.
2. Enter **PPN**, followed by a space.
3. Enter the country of origin, or the country's abbreviation (e.g. **USA**).

**9023 PPN USA**

**4568 PPN FRA**

### Border Crossing Card

1. Use the back of the card (no photo)
2. Use the last four digits of the number at the bottom on the first line beginning with MEX

**MEX 6789**

### Matricula Consular

1. Enter the last four digits of the number in the lower right corner on the picture side of the ID location below the expirations date followed by a space
2. Enter the country abbreviation followed by a space then **MAT CON**

**1244 MX MAT CON**

### Employment Authorization Document

1. Use the front of the card (photo)
2. Under the name is a USCIS number. Enter the last four digits of the number followed by a space, then **USEA**

**1244 USEA**

## PARENT/GUARDIAN

Only use for Juvenile or Teen cards. Input information in ID field using the same parameters listed above. Optionally a P/ may be added (meaning parent) before type of identification, i.e., 9760 P/CDL, 9760 P/CID, 0628 P/MLD, etc.

Enter first name first, middle initial or name, and last name last: **Mary Jane Patron**

## STAFF INITIALS

Use your library's 2-letter code as used in Koha and a forward slash and your initials: **LM/ss**

## STANDARDS FOR PATRON NOTES IN KOHA

Select the appropriate type of note to deliver the message to patron and/or staff.

- All notes should be brief and include only pertinent facts.
- All free-text notes should include date first, then Branch/staff initials
- In Patron Status Notes put most recent note at the top, date first, then Branch/staff initials.

If the notes field is full, refer to the supervisor for review.

## PATRON REGISTRATION REQUIREMENTS

A jurisdiction should only change another library's patron codes if the individual has moved to that jurisdiction.

| <b>TYPE</b> | <b>SP <sup>3</sup></b>      | <b>LM</b>             | <b>PR</b>             | <b>SM <sup>2</sup></b>       | <b>GV</b>  | <b>CC</b>                  |
|-------------|-----------------------------|-----------------------|-----------------------|------------------------------|--|----------------------------|
| Adult       | ID & proof of address       | ID & proof of address | ID & proof of address | ID & proof of address        | ID & proof of address see below 1                    | See below 1                |
| Juvenile    | parent ID& proof of address | parent ID             | parent ID             | parent ID & proof of address | see below 1  | See below 1                |
| Welcome     | ID                          | ID                    | ID                    | ID                           | see below 1  | n/a                        |
| Teen        | N/A                         | n/a                   | parent ID             | n/a                          | Age 13-17 issued w/out ID and w/out proof of address | Ages 13-17 issued w/out ID |

<sup>1</sup> GV will issue a card with a government-issued ID with photo and proof of address. If there is no proof of address the patron will be asked to write the address on a preprinted confirmation postcard which will be mailed. The subsequent presentation of this card with its postmark shall constitute proof of address. GO issue cards to institutions with proper institutional ID and with individuals associated with institutions accepting personal responsibility.

<sup>2</sup> SM will mail cards to patrons who have no other way to verify their mailing address. Patron is allowed to check out 2 items before card is mailed.

<sup>3</sup> SP will issue a card with a government-issued ID with a photo and proof of a permanent residential address. SP will mail postcards to patrons who have no other way to verify their mailing address. The return of this card with a recent postmark will be used as proof of address. If the address used is a transitional location, a Welcome card will be issued instead of a permanent card. If the address used is a P.O. Box, mail with a recent postmark is required.

## LIBRARY CARDS

It is a common practice to issue library cards to individuals only, apart from ILL institutions. Lompoc issues cards to the prison. The prison gets a higher checkout limit.

In October 2020, the Administrative Council voted that juvenile or teen patrons 'aging up' to adult cards should have existing fines and fees removed from their account.

## ONLINE REGISTRATION \*

Patrons may register online and receive a temporary barcode starting with the library prefix and then an 'E' (example 22138E). Libraries are assigned based on zip code designations through a 3rd party vendor that does address verification. "E" cardholder registration is set at 3 months. These cardholders may place holds and use online services such as Overdrive.

\*Carpinteria and Paso Robles Libraries do not use online registration at this time.

## CARD EXPIRATION

Check is determined by jurisdiction. *See Patron Type table for expiration dates.*