

Patron Records

Policy: Minimum Requirements for Patron Records

Creating a Patron Record

Each patron record must contain only one patron name in the (N) field and a 14-digit barcode. The name should be entered as follows: last name, first name middle initial. No other punctuation should be entered on this line and only one (N) field is permitted per patron record.

No other information is required. However, libraries are strongly encouraged to include or use the following information:

Legal name

Phone Number, with area code, no parentheses

Email address

Physical address

Birth date

License Number

Libraries are prohibited from collecting patron social security numbers

All patron records must expire after one year. Expired patrons with no outstanding charges must be purged from the system after five years.

It is permissible to create “dummy records” for internal purposes, such as “TPL cataloging” or similar records. All such record names must start with the three-character abbreviation for the library; i.e. TPL, BML, etc. Interlibrary loan items requested on these accounts may not be used for displays and must adhere to all limitations imposed by the system (such as hold shelf and circulation periods and renewal eligibility

Tip- Check for other patron accounts in system before issuing new card. Many Minerva libraries will not issue a new card if the individual has billed items at other libraries.

Policy: Integrity of Records (non-interference)

In order to preserve the integrity of records, and to facilitate the movement of materials across the network, no member may edit or otherwise alter item or patron records belonging to another member. Members are prohibited from overriding or otherwise working around 'blocks' and/or limitations imposed by the system (such as circulation periods, renewal eligibility, collecting replacement charges, etc.)

The ONLY exceptions to this policy are as follows:

Library A sends an electronic or postal notification to a patron registered with Library B and receives notification that the email or postal address is incorrect. In these instances, Library A may alter Library B's patron record in the following manner to reflect that the address is incorrect. Library A may (and should) access the patron record and add either "a" for "verify address" or "z" for "verify email" to the PMESSAGE field. In instances where a postal address is found to be undeliverable, the library should add the text "(UND)" to the beginning of the first address line within the patron account in order to flag the address as undeliverable the next time a notice is generated for the account.

Note: (UND) stands for 'undeliverable' and must include the parenthesis. Libraries should take care to remove the (UND) from the address field when updating an account with current information.

An owning library receives payment for a billed Minerva inter-library loan item. In these instances, the owning library must access the billed patron's account, select the SYSTEM GENERATED replacement charge for their item on the account (not the manual charge) and collected the amount. The borrowing patron's library should NEVER change the status of another library's item.

In special circumstances concessions to these rules may be made if the borrowing library receives permission from the owning library.

NOTE: This policy does not apply to, nor is it meant to in any way limit, the work done by catalogers across the network in maintaining the integrity of bibliographic records.

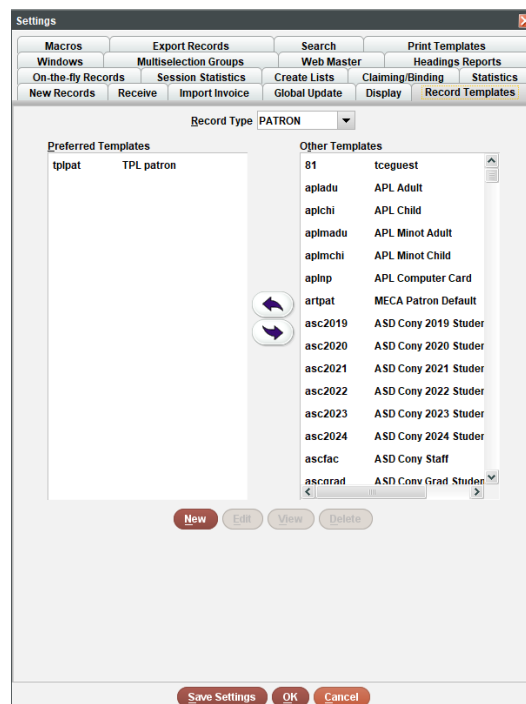
How to Create a Patron Record template

Templates are used to create consistent looking records and to stream-line the record creation process. Once these templates are created and added to the users' preferred templates list, the user can then select a template from the list prompt when creating a new record for a patron, item or bibliographic record. A staff member who has permissions may create, edit or delete templates by going to **Admin** in the **File** menu and selecting **Settings**. From there choose the **Record Templates** tab.

Go to **Admin>Settings**

Select the **Record Templates** tab

Change the **Record Type** drop-down menu to the type of template you wish to create.



Then, select the **New** button

Enter a short code beginning with your library's initials and 2-3 additional characters

Enter a brief description

Place your cursor in the fixed fields that you would like to prompt for information in the template that may change from record to record

Select the **Prompt** icon

Update the fixed fields that are consistent in this type of record with the appropriate information

To select fields to display in the variable field area of the template, click on **Insert**

Choose the variable field you want to display and click **OK**

If you would like it to prompt, place your cursor on that line and select **Prompt**

Continue doing these steps until your template is complete

Once done, click the **Save** and **Close** icons

Click **Save Settings**. This saves your additions and updates permanently, as clicking **OK** will only save for the current session.

Creating a Patron Record

1. Select the **Check Out (Circulation Desk)** from the **Functions** menu in the upper right of the screen.
2. Select the **New** icon at the top-right of the screen or go to the **File** menu and select **File>New Patron**.
3. Choose one of the record templates from the list by double-clicking on the template's name.
4. Sierra offers a "wizard" (a series of dialogs) to prompt you for your patron's information. You may customize this template.
5. Select **Next** to proceed to the next field in the wizard. Once you have responded to all of the wizard's prompts, you have the opportunity to edit the record you just created.
6. Enter record information and then **Save/Close** your changes.

Tip – to enter the expiration date, type either '**t**' or '**c**' in the box. Typing '**t**' enters today's date, and you can change the year. Typing '**c**' displays a calendar to choose the expiration date.

Edit/View Patron Information

Select the Check Out (Circulation Desk) from the Functions menu in the upper right of the screen. and scan patron's barcode or enter nlastname, firstname.

To view only, click on the VIEW icon at the top right of the screen.

To edit information, click on the EDIT button on the top right of the screen. You can now edit Patron information by double clicking on the white fields in the patron record block or by clicking on the individual field lines, right click for more options.

To insert additional information click on the INSERT icon and select the appropriate field from the drop down menu. After making changes click on the SAVE icon. Click on CLOSE icon to exit.

To set up a patron's account so there are multiple e-mail addresses, string the emails together in one single z field, separated by a comma (no space). If you put a second z field, the system will ignore it, but it will email as many addresses as you like in one field.

View Item Information on a Patron's Account

Right click on the checked out item and select view item. Right clicking on the items under the HOLDS tab provides additional information.

Waiving and collection of fines

Bring up a patron's record and click on the Fines tab on the left-hand side.

Viewing Cancelled Holds

Bring up a patron's record and click on the Holds tab on the left-hand side. Click on the View Cancelled Holds button. You will see the date an item was cancelled, the item title and barcode, the login of the party that cancelled the hold and whether it was cancelled in the Web OPAC or in the Sierra Desktop module. After viewing you have the option of exiting by clicking OK or print the table before clicking OK to exit.

Invalid Email Addresses

To identify patrons with invalid email addresses:

Go to create lists

Choose the smallest available list size you will need

Click on the Search Records button

Name your review file

Select Patron under the Store Record Type

Select Index from the range drop down menu

Select Barcode(b) instead of Patron (n)

Enter the beginning and ending range of your patron barcode (ex. 28888000000000 to 28888000999999)

In the term 1 line: Operator= blank, Type=Patron, Field=Pmessage, Condition=equal to, and Value A= Verify Email

Click Search button

After your search is complete you can download the patron fields you need to an Excel spreadsheet and empty the list slot for others to us.