

# Patron Registration Procedures

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## Issuing a new OWLSnet borrowers card

A library may issue a new OWLSnet borrowers card to any eligible Wisconsin resident (please see [Eligibility](#) statement below) who does not already have an OWLSnet library card AND

1. Resides in municipality directly served by the library  
OR
2. Intends to make this their primary OWLSnet library

Library staff are responsible for making sure that patrons do not receive duplicate library cards. It is OWLSnet policy that patrons can only be assigned one card, and each card must be assigned to only one person.

## Patron Registration Procedures

If a patron wishes to change their home agency because they've moved or will be changing their primary library, they must re-register at their new home agency (please see [Home Agency Change](#) for details.)

### *Eligibility*

Any resident of, or owner of property in, the Outagamie Waupaca Library System (OWLS) area or the Nicolet Federated Library System (NFLS) area is eligible to receive an OWLSnet borrower's card. This includes residents or owners of property in Brown County, Door County, Florence County, Kewaunee County, Marinette County, Menominee County, Oconto County, Outagamie County, Shawano County, Waupaca County, the City of Appleton in Calumet County, or the City of Appleton in Winnebago County.

Any resident of a Wisconsin public library system that has an intersystem on-site borrowing agreement in effect with either OWLS or NFLS is eligible to receive an OWLSnet borrower's card. Because all public library systems in Wisconsin have intersystem on-site borrowing agreements with either OWLS or NFLS, all residents of the state are eligible to receive OWLSnet borrower's cards.

Any OWLSnet library may issue a *local library card* to an out-of-state visitor who does not qualify for an OWLSnet card, e.g. a resident of another state. These local library nonresident cards are not required to be honored by all OWLSnet member libraries.

A school, business, or other organization is eligible to receive an OWLSnet borrower's card in accordance with the terms and conditions of the OWLSnet Institution Cards Procedure.

Any library that is not a member of OWLSnet that borrows materials from an OWLSnet library is eligible to receive an OWLSnet interlibrary loan borrower's card.

### *Duplicate checking*

It's important to be thorough when entering a new patron record to prevent patrons from having more than one card. The additional time it takes to search several variations of a name is well worth it.

- Ask if the patron has ever had a card in any area library.
- Even if they say no, still check to see if the patron already has a card in the system.
- In the barcode field enter **lastname, first two or three letters of the first name**. Hit Enter or click the **Search** button.
- If the patron uses a nickname that is very different from the name on their identification, go back and search under that name as well.
- If there is a common nickname for their name, search under that name as well.
- If there are spaces or punctuation marks in their last name, search under that name as well.

# Patron Registration Procedures

## Creating a new patron record

Note: when creating a new record, if you have made a mistake or need to go back to a field, finish entering information in all of the prompts and then go back and insert or edit the information.

- Begin by clicking the **New** icon.
- Select the appropriate template for the patron and click **Select**.

The edit view of the patron record is divided into upper (fixed-length fields) and lower (variable-length field) sections.

p12414906 Last Updated: 03-26-2008 Created: 02-28-2006 Revisions: 192					
Expiration Date	02-28-2009	Birth Date	08-13-1969	ILL Request	0
Gender	f FEMALE	Library Location	oa Appleton	Audiobooks checked out	0
Patron Code 2	- -	Patron Message	- - -	Software checked out	0
Patron Code 3	0	Manual Block	- - -	Municipality	205 Appleton (city) Outa
Patron Type	190 Training - Fine	Claims Returned	1	Home Agency	1 Appleton
Total Checkouts	23	Money Owed	\$0.75	Last Circ Activity	03-26-2008
Total Renewals	12	Videos checked out	0	Preferred Language	eng <input type="checkbox"/> English
Current Checkouts	0	Music checked out	0	Notice Preference	z EMAIL

Name	TESTY, PEGGY S
Name	OWLS TEST CARD
Address	street address 225 N ONEIDA ST
	city state zip APPLETON WI 54911
Telephone	920-832-6365
AltID	TEST081369
Barcode	21389006699864
Email	<a href="mailto:owls@mail.owls.lib.wi.us">owls@mail.owls.lib.wi.us</a>
PIN	JokXYa7VignUU

### Fixed Length Fields

Patron records and item records in Millennium contain both fixed length fields and variable length fields. Fixed length fields are entered by selecting from a list possible (fixed length) results. Fixed length fields appear first in each record.

### Expiration date

**Hint:** Type the letter **t** for today's date, backspace one space and then type in the year. Please note: An expiration date is of up to three required for all cards.

### Birth Date

Please note: Birthdate is required. All patrons must supply date of birth to be given a card. Enter the patron's birth date with the two digit month, two digit day, and four digit year.

### Gender

Type **f** for female or **m** for male.

## Patron Registration Procedures

### *Library Location*

Enter your library's 2 letter code.

<u>Library</u>	<u>Code</u>	<u>Library</u>	<u>Code</u>	<u>Library</u>	<u>Code</u>
Algoma	ka	Green Earth	ng	Oconto Falls	cf
Appleton	oa	Hortonville	oh	Oneida	no
Bailey's Harbor	db	Iola	wi	Peshtigo	mp
Biramwood	sb	Kaukauna	ok	Scandinavia	ws
Black Creek	ob	Keshena	ek	Seymour	oe
Bonduel	so	Kewaunee	kk	Shawano	ss
Clintonville	wc	Kimberly	oi	Shiocton	ot
Coleman-Pound	mc	Lakewood	cl	Sister Bay	di
Crivitz	mr	Lena	ce	Sturgeon Bay	ds
Egg Harbor	de	Little Chute	ol	Suring	cs
Ephraim	dp	Manawa	wm	Tigerton	st
Fish Creek	df	Marinette	mm	Washington Island	dw
Florence	ff	Marion	wa	Waupaca	ww
Forestville	do	Mattoon	sm	Wausaukee	mw
Fremont	wf	New London	on	Weyauwega	we
Gillett	cg	Niagara	mn	Wittenberg	sw
Goodman-Dunbar	mg	Oconto	co		

### *Municipality*

Note: please be sure to assign the correct municipality code, as circulation statistics (and often county reimbursements) depend on this data.

The list of patron municipality codes should be consulted when assigning a code to a patron record. Generally, a patron record is assigned the code for the city, village, or town where the patron lives. However, more specific guidelines have been developed:

1. A resident of the NFLS or OWLS system areas should be assigned the code for the specific jurisdiction where he/she lives.
2. A resident of the NFLS or OWLS system areas who owns multiple dwellings or properties within the NFLS or OWLS system areas should be assigned the SCAT for his/her primary domicile.
3. A nonresident of the NFLS or OWLS system areas who owns a dwelling or property within the NFLS or OWLS system areas should be assigned the code for the jurisdiction where he/she owns property.
4. A nonresident of the NFLS or OWLS system areas who does not own property within the NFLS or OWLS system areas should be assigned the code for the jurisdiction where he/she lives, e.g., other Wisconsin counties/systems, other states.

## Patron Registration Procedures

### *Patron Type*

Please follow the OWLSnet Ptypes Procedure in assigning patron types. For more information, see [Creating Cards with Special Patron Types](#).

Ptypes Procedure Created on 1/19/2007

<b>Number</b>	<b>Name</b>	<b>Description</b>
0	Adult	Should be used for most patrons age 18 and above.
1	Juvenile	Age limit defined locally, but should be under age 18.
3	Community Card	Used by certain libraries for patrons who are limited to fewer checkouts at a time. If your library wishes to use Community Cards and has not in the past, please contact OWLS. Community Cards are only valid at those libraries who have requested them.
5	Employee	Used for currently employed library staff.
6	Walking Books	Used for materials checked out to patrons who cannot get to the library.
7	Institution	Used for schools, daycares, businesses, etc. For more information see Institution Cards policy.
8	Internal	Used for internal library locations such as technical services.
20	Internet Only	Used for patrons who cannot check out items, but have a card for internet purposes only.
30	ILL other libraries	Used for non OWLSnet libraries for purposes of ILL.
190	Training – Fines	OWLSnet staff use only – please do not assign cards to this Ptype.
199	Web OPAC staff	OWLSnet staff use only – please do not assign cards to this Ptype.

## Patron Registration Procedures

### *Home Agency*

Enter your library's home agency code.

<u>Library</u>	<u>Code</u>	<u>Library</u>	<u>Code</u>	<u>Library</u>	<u>Code</u>
Algoma	0	Green Earth	9	Oconto Falls	34
Appleton	1	Hortonville	18	Oneida	35
Bailey's Harbor	2	Iola	19	Peshtigo	36
Birnamwood	3	Kaukauna	20	Scandinavia	37
Black Creek	4	Keshena	21	Seymour	38
Bonduel	5	Kewaunee	22	Shawano	39
Clintonville	6	Kimberly	23	Shiocton	40
Coleman-Pound	7	Lakewood	24	Sister Bay	41
Crivitz	8	Lena	25	Sturgeon Bay	42
Egg Harbor	10	Little Chute	26	Suring	43
Ephraim	11	Manawa	27	Tigerton	44
Fish Creek	12	Marinette	28	Washington Island	45
Florence	13	Marion	29	Waupaca	46
Forestville	14	Mattoon	30	Wausaukee	47
Fremont	15	New London	31	Weyauwega	48
Gillett	16	Niagara	32	Wittenberg	49
Goodman-Dunbar	17	Oconto	33		

### *Notice Preference*

Please choose **Print** if the patron does not want to receive notices by email. The notice codes are **a – Print** and **z – Email**.

Please note: If a patron wishes to receive notices by email, you will also need to enter their email address in the variable-length email address field.

### *Variable Length Fields*

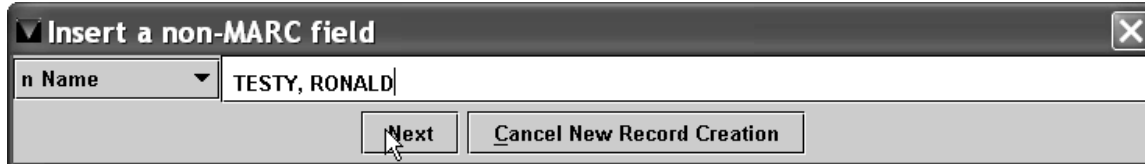
Patron records and item records in Millennium contain both fixed length fields and variable length fields. Fixed length fields appear first in each record, followed by variable length fields. Variable length fields are free-form – any information can be typed into these fields.

### *Postal Guidelines*

The postal addressing guidelines ask for the use of uppercase characters throughout the address with no punctuation. If an address includes a street and PO Box number, you may use the PO Box as the primary address, but also include the street address in an additional address field.

## Patron Registration Procedures

### Name



- Enter the name and address in **ALL CAPS**.
- The patron's name should be entered **LASTNAME, FIRSTNAME M** (no period after initial).
  - All last names should be entered with no spaces.
  - Compound last names should be entered with dashes  
EXAMPLE: MARTIN-ERICKSON
  - Last names with apostrophes should be entered with no space and no apostrophe  
EXAMPLE: OBRIEN
  - Last names with spaces should be entered without the spaces  
EXAMPLE: Van de Hei should be entered as VANDEHEI  
EXAMPLE: Vande Hei should also be entered as VANDEHEI
  - Last names beginning with St or Mc or Mac should be entered with no spaces, but the last letter of the prefix should be entered with a small letter  
EXAMPLE: St Albins should be entered as StALBINS  
EXAMPLE: Mac Duffy should be entered as MACDUFFY
  - The primary name should not include Jr. or Sr, although this should be created as second name field with the suffix added after the last name, without a comma.  
EXAMPLE: John F Buchanan, Sr should be entered as  
1<sup>st</sup> NAME FIELD: BUCHANAN, JOHN F  
2<sup>nd</sup> NAME FIELD: BUCHANAN SR, JOHN F
  - Be alert to the use of nicknames. In the case of a patron wanting a card with a nickname, enter two name fields and make the top one the name on their patron card.  
EXAMPLE: Marjorie M(Muffy) Fitzwilliams should be entered as  
1<sup>st</sup> NAME FIELD: FITZWILLIAMS, MUFFY  
2<sup>nd</sup> NAME FIELD: FITZWILLIAMS, MARJORIE M

### Address

Name	OBRIEN, PEGGY
Name	OBRIEN, MARGARET M
Address	1900 MEET ME IN ST LOUIS AVE
	APPLETON WI 54911
Telephone	920-832-6365
AltID	OBRI012776
Barcode	21389003564277
Email	<a href="mailto:jhocking@mail.owls.lib.wi.us">jhocking@mail.owls.lib.wi.us</a>

- Use standard abbreviations for the address (AVE, DR, PO BOX, etc) with no punctuation. See the information on postal abbreviations and information format in the appendix.

## Patron Registration Procedures

- If a patron has multiple addresses, use a second Address field. Make sure that the correct mailing address appears above the second address. To do this, right click on the address field that should appear first and select “Move to Top of Group.”
- If a patron has a PO Box there are two options for entering addresses. The first is to follow the procedure for entering multiple addresses. The second option is to include both the street address and PO Box in one address field. The post office will deliver the mail to the address that is directly above the city and state line. Accordingly, if the PO Box is the correct mailing address, the following format should be used in the address field:
  - 124 W SUNNY ST  
PO BOX 527  
YOUR TOWN WI 55555

### *Standard postal abbreviations*

AVE	avenue
BLVD	boulevard
CIR	circle
CT	court
CTY	county
DR	drive
HWY	highway
LN	lane
PL	place
PO	post office, i.e. PO BOX
RD	road
ST	street
TER	terrace

### *Email address*

- Enter the email address in lowercase characters.

### *AltID*

- The AltID is the first four letters of the patron’s last name followed by the birth date in the six digit form MMDDYY; i.e. OBRI012776. If a patron has a last name that is less than four digits an asterisk will need to be put in place of missing letters; i.e. LEE\*052181.
- Entering the AltID correctly will improve duplicate patron record checking.
- It is unnecessary to use an AltID for corporations or schools.

### *Finding a duplicate record*

If another record is found that matches the name or the AltID, the duplicate record will pop up on top of the new patron entry form. When this happens:

## Patron Registration Procedures

- Check the duplicate record to see if this is the same patron.
- If you wish to use the old record and stop creating the new record click **Use Patron Record**.
- If this is not the same person (i.e. the AltID will be duplicated for twins), click the **Close** icon and continue entering the patron data.
- Clicking **Use Patron Record** will cancel new record and bring up existing record.
- Clicking the **Close** icon will close the duplicate record and return you to the new record.
- When you are done entering the information, click the **Save/Close** icon.

### *Creating cards with special patron types*

#### *Community cards*

Community cards are currently only in use at Appleton and Shawano. Community cards will only work at those libraries. Community cards have a lower limit of checkouts per patron (determined by the library).

#### *Employee cards*

Employee cards should follow all procedures for creating standard patron cards, including the expiration date, birthdate, and employee address. Currently, employee cards do not accrue fines, however, employees are expected to follow all OWLSnet policies and procedures as well as adhere to their local library policies. Employees are expected to return materials on time. Note: Items used for library purposes must be checked out on *Internal* cards, not Employee cards.

#### *ILL cards*

Loans to non-OWLSnet libraries are considered Interlibrary Loans, so ILL cards are issued to any libraries that wish to borrow materials from any OWLSnet library. The name should be entered in the following format:

- (1<sup>st</sup> name field) LIBRARY, NEW AUBURN HIGH SCHOOL  
AND (if applicable)
- (2<sup>nd</sup> name field) LIBRARY, BILL & MELINDA GATES HIGH SCHOOL

#### *Internal Cards*

Internal cards are used for internal library locations such as technical services. Internal cards should include the libraries full address as well as an expiration date. The name should be entered in the following format:

- (1<sup>st</sup> name field) NEW AUBURN PUBLIC LIBRARY TECH SERVICES DEPT
  - The word "Public" is optional
  - The department name is optional
- (2<sup>nd</sup> name field) LIBRARY, NEW AUBURN PUBLIC  
OR
- (2<sup>nd</sup> name field) LIBRARY, BILL & MELINDA GATES PUBLIC

Note: Items used for employees personal use should be checked out on *Employee* cards, not Internal cards.

# Patron Registration Procedures

## *Institution cards*

Institution Cards Procedure Created on 1/19/2007

OWLSnet libraries may issue Institution cards to schools, business and other organizations, but not other libraries. Individual libraries can determine if these cards accrue fines, but the institution is responsible for any lost or damaged material. OWLSnet libraries may choose to issue Institution cards under the following conditions:

1. The President, Director, Principal, or individual with signing authority for the institution must sign for the card, agreeing that the institution accepts responsibility for all materials checked out on the card.
2. The card should be given an expiration date of one year from the date the card is issued. When this card expires, the President, Director, Principal, or signing authority should sign for the card again in order for the card to remain valid.
3. The use of the card must be for materials which support the institution and not for personal needs.
4. Bills for any materials checked out on the Institution card must be sent directly to the Institution.
5. When entering data for the Institution card please use the following procedures:
  - a. Enter the name of the Institution in the name field.
  - b. Enter the address of the Institution in the address field.
  - c. Enter the name of the person who has signed for the card in a note field, along with their title.

## *Internet only cards*

These cards are only eligible to use the Internet. Generally, a patron is issued an Internet only card because they only want to use the internet. Patrons are not allowed to have a regular card and an Internet only card – only one card may be issued per person.

## *Walking books*

Walking books cards are used for the homebound. In some libraries, the card is assigned to the name and address of the homebound patron, and staff or volunteers select and deliver books. In other libraries, the card is assigned to the staff or volunteer who delivers the books, often to multiple patrons. Walking books cards do not receive fines.

## **Editing patron records**

### *Patron Record Update Form*

Whenever any changes are made to a patron record that was issued by another library, use the *Patron Record Update* form to inform the other library.

### *Inserting a message in a record*

After you have entered information in all of the prompts you can return to a fixed or variable field and edit the information.

## Patron Registration Procedures

- For example, if you need to note that proof of address is needed on a new patron, finish entering the patron information and then double-click on the **Patron Message** fixed field and select the **Verify Address** message.
- To select the message, click on it and click **OK**.
- The next time the patron card is scanned the **Verify Address** message will pop up.
- The address can be verified and the message can be removed the same way it was put on: click on the **Edit** icon and then put a hyphen in the **Patron Message** field or double-click in the block field and select **No Message**.
- When you are finished entering all the information, be sure to click the **Save/Close** icon.

### Lost Cards

#### Replacement Fee

There is a \$3.00 charge for a lost/damaged OWLSnet card. Libraries may decide to provide a first replacement card for free. If a card needs replacement because of defect, normal wear, or the patron wishes to replace an older card with an InfoSoup card, there is no charge.

#### Lost card procedure

- If a patron loses a library card and needs a replacement, call up the patron record and click the **Edit** icon to get the edit view of the patron record.
- Click the **Insert** icon to insert a new barcode field.
- Scan in the new barcode.
- Click at the end of the old barcode and type in a brief note indicating that it has been lost. Remember to include the date and your initials.

Name	LOST, LARRY L
Address	13 MISPLACED AVE APPLETON, WI 54915
Telephone	920-832-6365
AltID	LOST121265
Barcode	21389003564251
Barcode	21389003564020 lost Dec 7, 2005 jh
Email	<a href="mailto:jhocking@mail.owls.lib.wi.us">jhocking@mail.owls.lib.wi.us</a>

- If it is your library's policy, insert a **Replace Card** field and enter the replacement information.



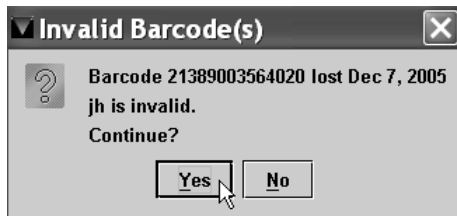
Insert a non-MARC field

e Replace Card free 12-7-05 jh

OK Cancel

- When you save the patron record, the old barcode field will register as invalid. This is correct.

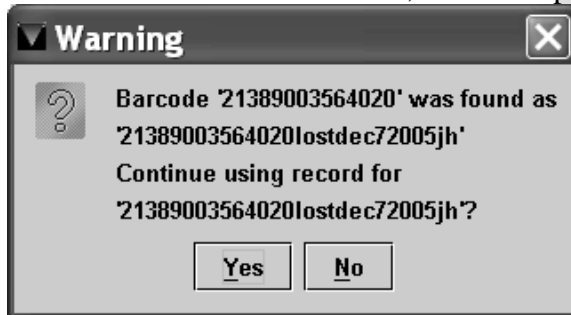
## Patron Registration Procedures



- The new barcode needs to be listed first (above the old barcode). If, by chance, the old barcode is above the new one, click to select the old barcode field.

Name	LOST, LARRY L
Address	13 MISPLACED AVE APPLETON, WI 54915
Telephone	920-832-6365
AltID	LOST121265
Barcode	21389003564020 lost Dec 7, 2005 jh
Barcode	21389003564251
Email	jhocking@mail.owls.lib.wi.us

- Right click the field and select **Move down** or **Move to Bottom of Group**.
- The old barcode will move below the new barcode.
- If the old barcode is scanned in, this is the popup:



- Because each patron in OWLSnet may have only one card, if the invalid card is scanned, the invalid card should be confiscated.
- To use the patron record that has this note on it, select **Yes**. Keep in mind that the patron account (record number) remains the same - only the barcode changes.

### *Parental Permission to Use the Internet*

Parental permission for juveniles to use the Internet may be entered on the patron's record. Libraries that have a signed permission slip on file may enter their agency code in the Internet field. The patron display at Checkout can be setup to display the Internet field.

### *Renewing Cards*

At each expiration, verify all information. Record any changes to the patron's computer record and renew the card to the next expiration date. Edit the paper copy according to your libraries procedures. If you are renewing a card for another agency, fill out the blue Patron Record Update form. Record any changes to the patron's computer record and route the blue slip to the home agency. This is a good time to tell patrons about overdue materials and fines on their account.

## Patron Registration Procedures

### *Address Changes*

Take current address information from the patron and update the computer record accordingly. If you are updating an address for another agency, fill out the blue Patron Record Update form and route to the home agency.

### *Home Agency Change*

Libraries must assign patrons home agencies to their own library. If a patron wishes to change home agencies, they must re-register at the new home agency. If you are the correct home agency library, ask the patron to complete an OWLSnet registration form to begin the patron registration process. A form of identification is required.

While generally, a patron requests a home agency change, a library may require a patron to re-register at their library under the following circumstances:

1. Patron is using the library where they reside, but are registered at a different home agency (usually this will occur when they move)
2. Patron is exclusively using a library (which is not the library where they reside), but is registered at the library where they reside.

Note: Patron blocks (total number of holds, checkouts and checkouts of media) are determined by home agency. Circulation counts for online renewals are also determined by home agency.

Take the patron's old card and give them a new card with the new barcode number. If you are able to destroy the old card, you may delete the old barcode and replace it with the new one. Otherwise, enter the words "replaced dd/dd" and add your initials and library code after the old barcode. Add a new barcode field and enter the new barcode, moving it up to the top of the barcode list. Change the home agency and library location to your library. If the patron has moved, make sure you change the municipality code as well as the address. Inform the previous home agency library with a *Patron Record Update* form.

Note: If the patron's OWLSnet card is in good condition, the barcode may be reused. On the *Patron Record Update* form, enter the barcode as both the old and new/current barcode. Note that the barcode is being reused.

### *Name Changes*

Have the patron fill out a new registration card. Issue a new card and take the old card. The old account can be deleted.

If the patron wants to keep their original card, have them fill out a new registration card. Keep the original name on the card and add in the new name, moving it to the top. Put a note on the account indicating the reason for the second name field.

## Patron Registration Procedures

### *Mail Returned*

If a notice is returned back from a library, the library (who may not be the home agency) should put a message on the patron's record (the fixed-length record *mail returned*) and put a note on the record with the information from the returned mail item. The next library to check out to the patron should verify the patron's address and remove the message.

### Questions and Answers

Q: Can staff at one library persuade a patron to change the home agency?

A: The patron must choose the home agency, which is either the library that the patron uses the most, or the library where the patron resides. Staff may require a patron to re-register under certain prescribed circumstances.

Q: What is the consequence of changing the home agency?

A: Patron blocks, which stipulate the maximum number of checked out items, maximum number of videos and CDs and maximum number of holds, are set by home agency.

Q: Will it change my library's circulation statistics?

A: Possibly. Renewals are assigned to the patron's home agency, so it makes sense for a patron's home agency to be their library of primary use.

Q: Can libraries change the patron's home agency for other OWLSnet libraries?

A: No, the consortium has agreed that the patron has to register at the home agency library. Patron registration procedures may vary slightly from library to library, such as, requesting a driver's license number.

Q: Can libraries checkout to registered patrons that require a home agency change?

A: Yes, place a stop on the patron's card and note in the delinquency notes field that the patron is required to reregister at a new home agency library. Inform the patron to reregister at his/her library of choice.

### Merging patron records

Note: Merging patron records requires director/supervisor level authorization.

- To merge patrons, get the **.p** record number from each record.
- Click the **Merge Patron** button in the navigation bar and fill in the patron numbers in the **Merge Duplicate Patrons** form. Be sure to put the source record number (the one to be deleted) and the destination record number (the one all transactions will be moved to) into the correct fields and click the **Merge Patrons** button.
- The information confirmation screen showing the records to be merged will appear. If the records are correct, click the **Merge Patrons** button again.

## Patron Registration Procedures

- The destination record will have a note containing the merged patron information, including the old barcode.
- If you have destroyed this card, you may delete the old barcode number or, if the source card (for the record that has been deleted) has not been destroyed, be sure to type **merged** next to it.
- To include the name that the merged card had been under, insert it in a second **Name** field.

### Deleting Patron Records

Only the home agency library may delete a patron record. Patron records with outstanding transactions may not be deleted. Outstanding transactions must be cleared before deleting. Undesirable patrons should not be deleted from the database. Place a Stop on the card and an explanation in the Delinquency Notes field.

Note: Deleting patron records requires director/supervisor level authorization.

- Open up the patron record and select the **Edit** button.
- From the edit screen select the **Delete** button.
- You will receive a confirmation that you want to delete the patron record. Select **Yes** and the patron will be deleted from the system.