



GETTING STARTED WITH **PATRON POINT**



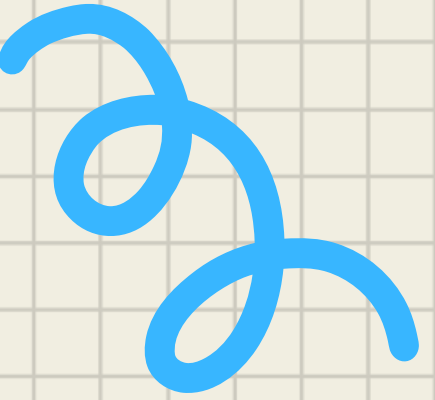


WHAT DOES IT DO?

As of this rollout, Patron Point is able to accept digital applications for library cards from potential patrons. The platform will then use customized map files to verify whether the patron lives in the library's service area, and search Sierra for already existing records. Patron Point also sends out welcome emails, renewal reminder emails, and emails notifying new adults (ie patrons who have just turned 18) to convert their card to an adult card.

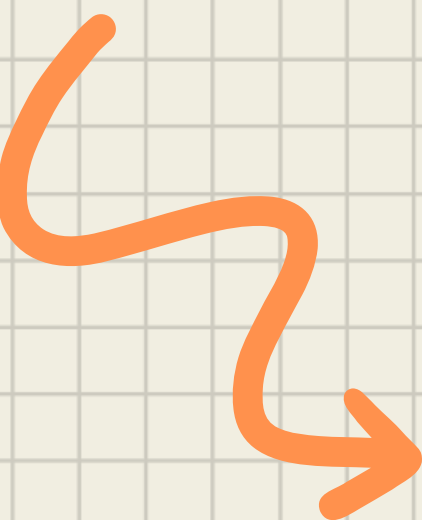


APPLICATION PROCESS



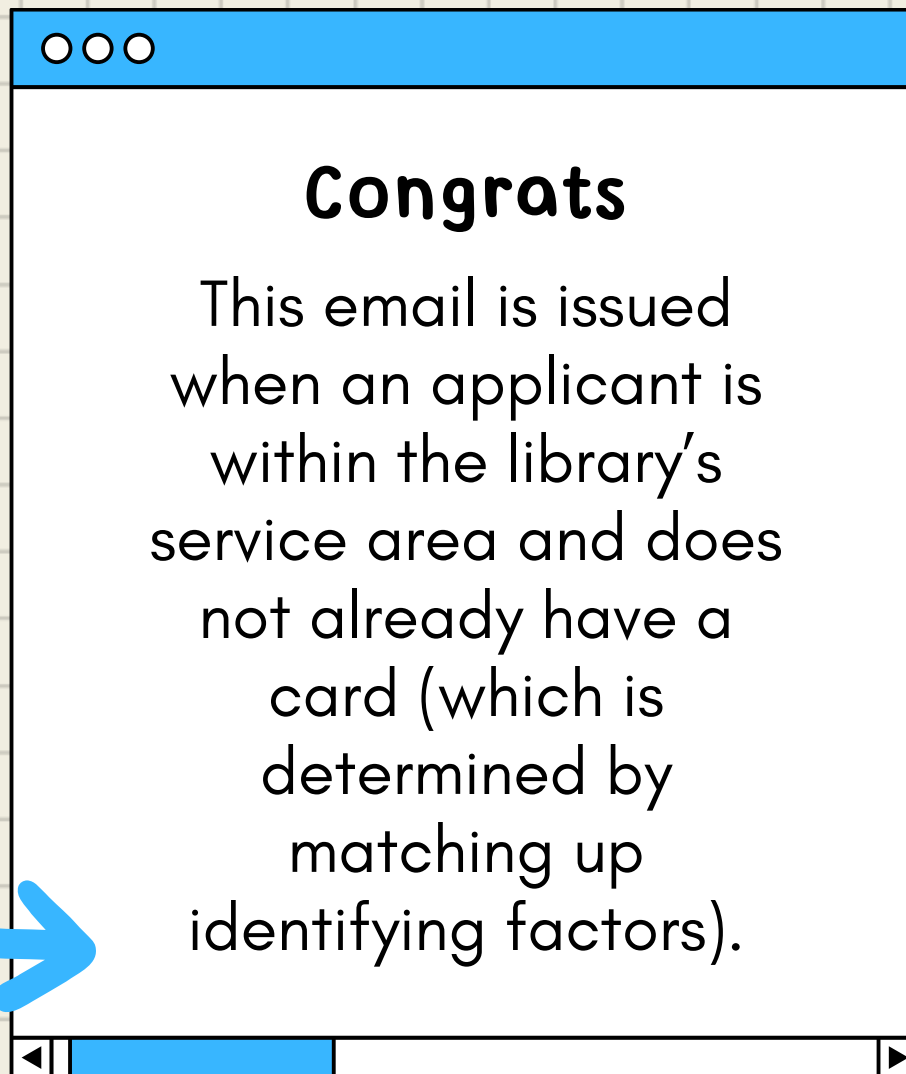
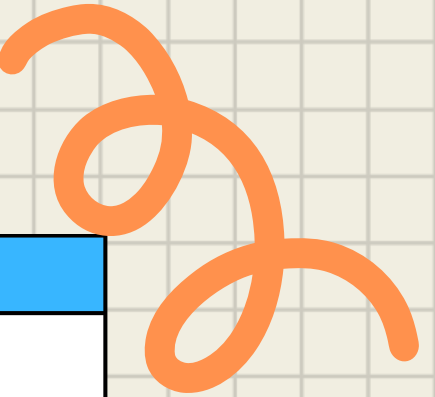
The application process is very simple – the library is not involved at all, and the patrons only have to fill out one form with their information. Some points to note:

- ★ Each Library has a minor form and an adult form
- ★ Patrons enter their own info, so info should be correct!
- ★ Results within minutes
- ★ Barcode automatically issued
- ★ Near instant access to digital resources





APPLICATION OUTCOMES

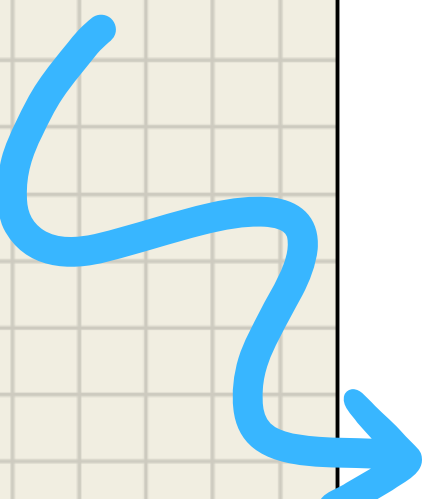
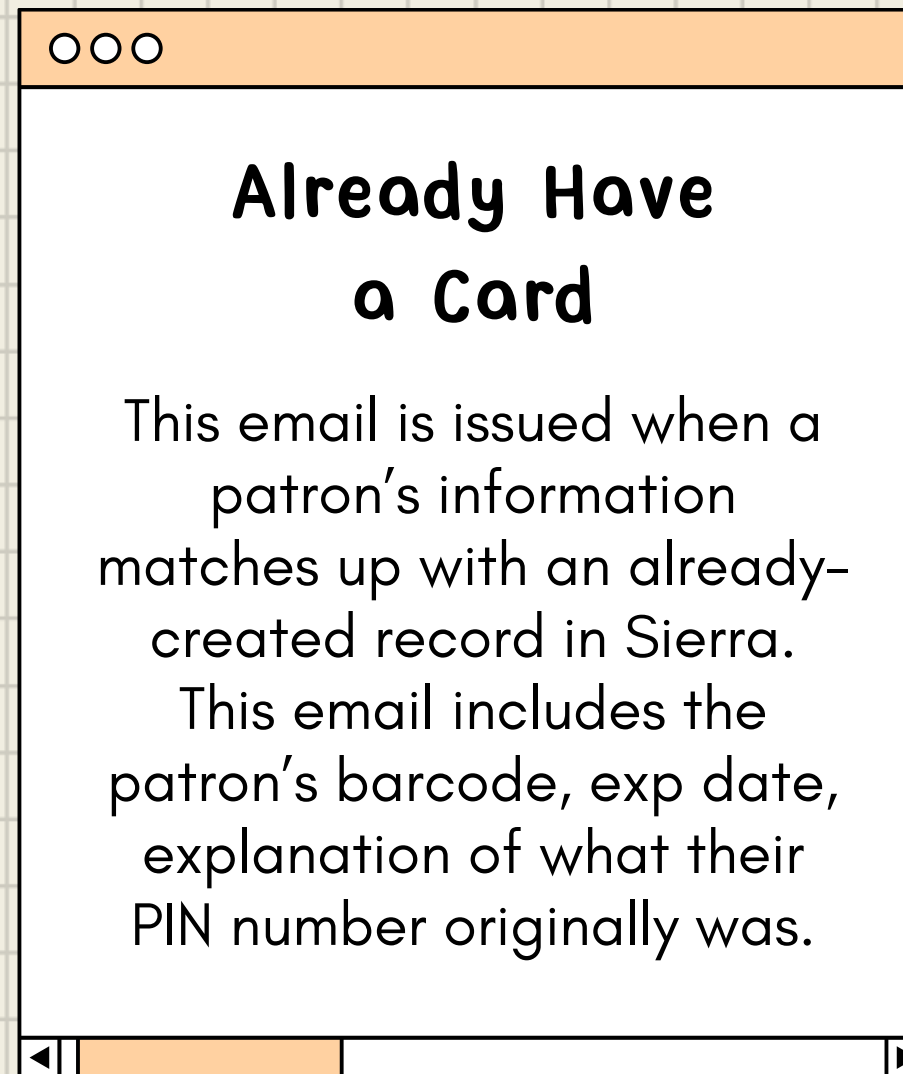


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Congrats

This email is issued when an applicant is within the library's service area and does not already have a card (which is determined by matching up identifying factors).

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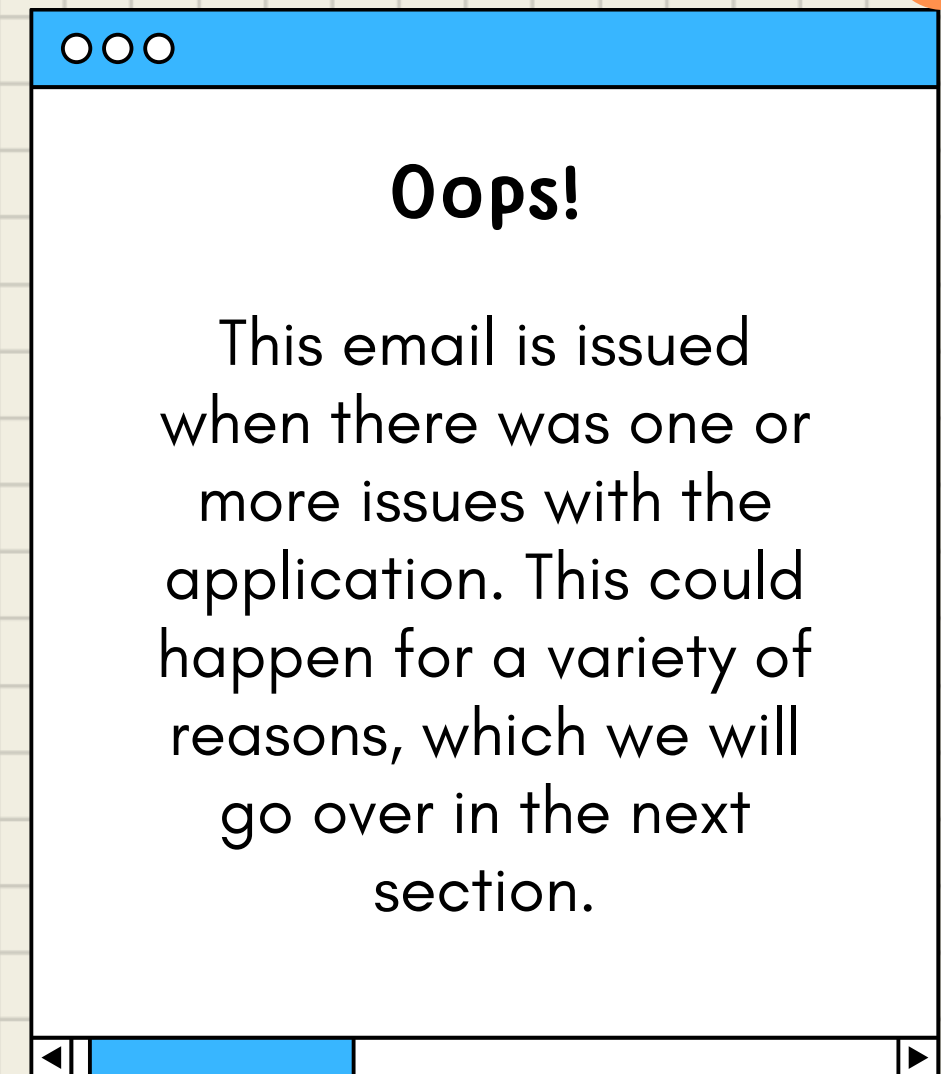
A blue arrow pointing from the left side of the slide towards the 'Congrats' email window.

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Already Have a Card

This email is issued when a patron's information matches up with an already-created record in Sierra. This email includes the patron's barcode, exp date, explanation of what their PIN number originally was.

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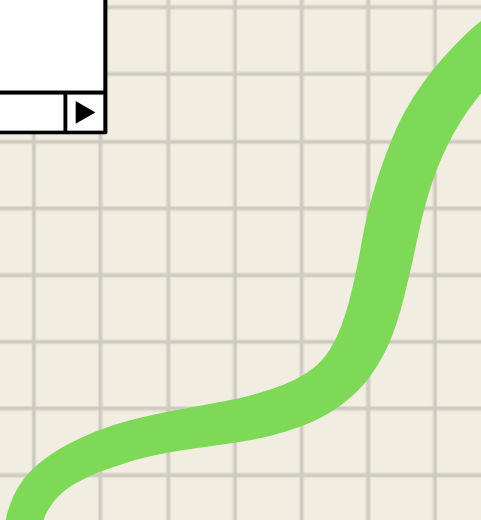


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Oops!

This email is issued when there was one or more issues with the application. This could happen for a variety of reasons, which we will go over in the next section.

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A green wavy line graphic located in the bottom right corner of the slide.



PATRON RECORDS

Edit info to comply with standards

Add PCODE 1

Add PCODE 4

Remove PMESSAGE (optional)

Add note to designate
patron as registered using
PP (optional)

PHYSICAL CARDS

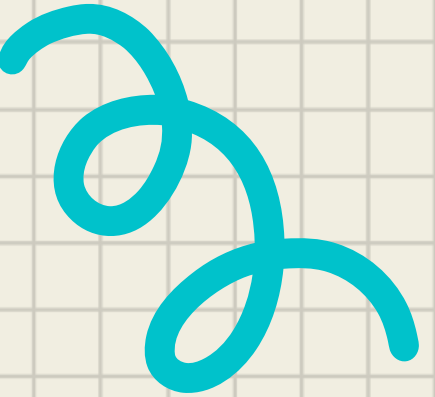
If a patron comes in to get a physical card from your library, treat it as if they were replacing a lost card. Put the old Patron Point barcode in a note field as "XXXXXXXXXX - Patron Point" and enter the card barcode in the active barcode field.

You will need to merge OverDrive records.





TROUBLESHOOTING AN OOPS EMAIL



Address Check

The first step to troubleshooting an oops email is to use the Lakeland Service maps to check the patron's address. Typically, the patron will contact you as the first step in this process, so retrieve the information from them, search the map and follow one of the below courses of action.

Issue Card

If the patron falls within your service area, issue them a card as normal and give Amber the address to look into.

Redirect

If a patron does not fall within your service area, direct them to the correct library if possible.







MONTHLY REPORTS



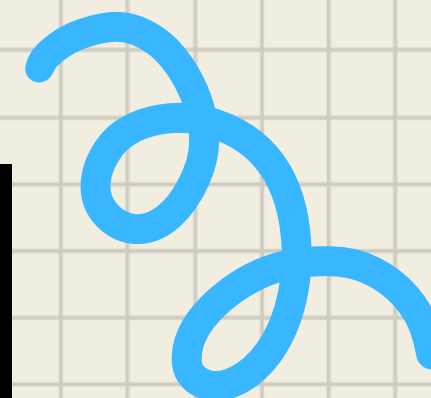
Each month you will receive a Patron Point Report. This report will allow you to format Patron Point Patrons if you wish, and also allow you to keep track of the number of applications for your statistics. The main purpose of this report is to ensure that no nonresidents are somehow slipping through our filters.

Information covered by the report includes:

- 
- | | |
|----------------|------------------------------|
| ★ PType | ★ Patron Info |
| ★ Home Library | ★ Application Date |
| ★ Pat Agency | ★ Missing (nonrequired) info |
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BOTTOM LINE



This is a lot! The good news is that the program takes care of a lot of the work, and I'll take care of more behind the scenes. Here's the bottom line of what I need from the libraries:

- ★ Install the forms on your site if you choose to host
- ★ Advertise that Patron Point is available for use
- ★ Record cleanup
- ★ Monitor monthly reports
- ★ Report issues to me
- ★ Help rejected patrons

