



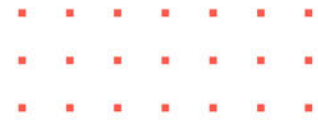
Patron Point

PATRON POINT

HANDBOOK

IMPLEMENTATION, USE,
AND MORE

Form Installation



Apply for a **Gary Byker Memorial Library of Hudsonville Card!**

Adult Card Application

Minor Card Application

There are two ways to install Patron Point registration forms and have them publicly available for patron use - there are pros and cons to each. The first option is to have Lakeland host the forms on our website. This means that you would not need to worry about updating the code on your website when things on the backend are changed. However, it is in a extra step that may confuse some patrons.

To have Lakeland host the forms, let Amber know you would like this option. Amber will get the pages set up and provide you with the direct link to your library's Application page. You can then add that direct link to your website.

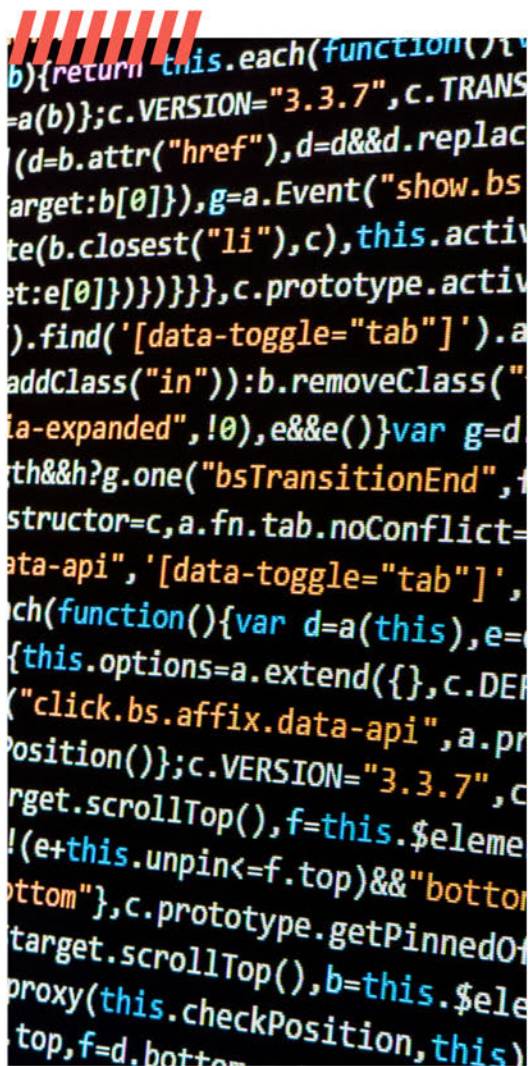
Form Installation



The first option is to have Lakeland host the forms on our website. This option would give you a bit more control over the form and the application will stay with your website. However, you will need to manually update the code when changes are made.

In order to utilize this option, let Amber know you would like the code for your forms. Amber will send you the code for your Adult and Minor forms.

On your website, you should be able to insert custom HTML on a new or existing page. Copying and pasting the provided code should insert the correct form. The complete code is what allows the forms to connect to Patron Point's backend, so do not edit the code unless you are very familiar with HTML and CSS coding. Once you save and publish the webpage with your code, it will be ready for patron use.



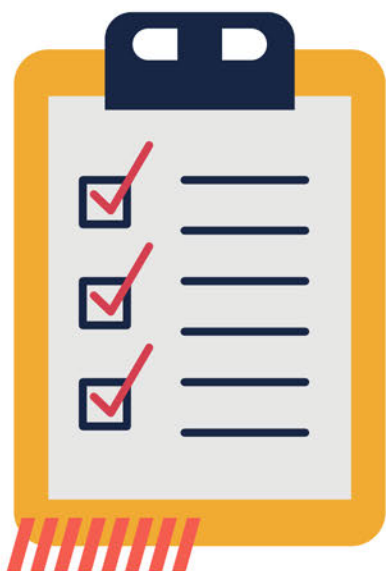
How Patron Point Forms Work



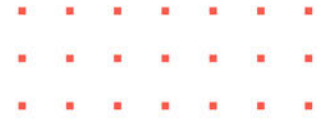
The application forms will determine whether a patron is in the library's service area or whether they already have a card. If the applicant is not in the library's service area, the patron will receive a rejection email. If the patron already has a card (based on verification factors such as a name, birthdate, ID number), the patron will receive an email with their card information.

If the patron does not have a card **and** is in the library's service area, the following information will be transferred to Sierra: **Legal Name, Preferred Name, Birth Date, Address, Email, Phone Number, ID Number** ("Government ID" on the form), **Home Library** (automatically assigned unless library has multiple branches),

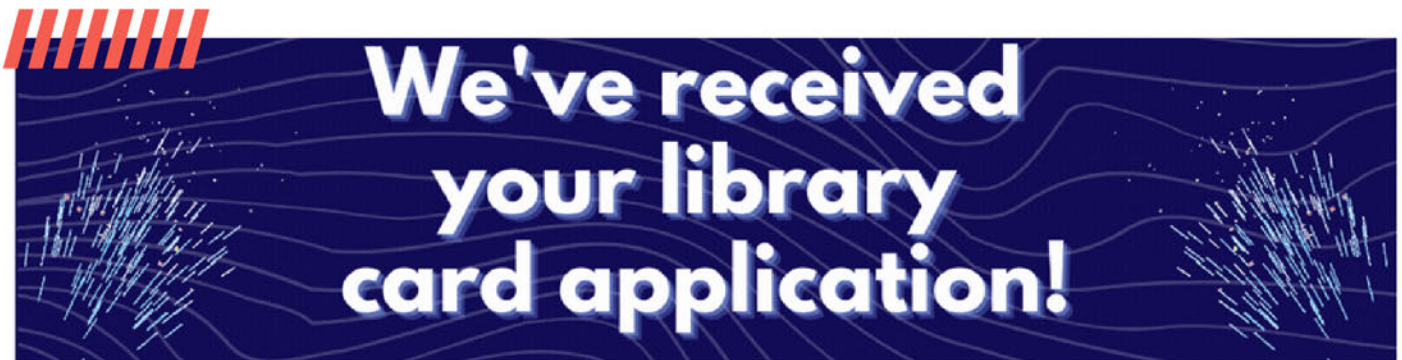
Patron Type (automatically given the library's code for adult or minor based on form), **Patron Agency** (based on form approval), **PMessage** (automatically assigned to designate the patron as registered using Patron Point), and **PCode 2** (adult or minor based on form).



Application Results



Once the application is submitted, the patron will automatically be redirected to a confirmation page on the Lakeland website. This page gives a brief overview of the possible results as well. It typically takes between five and fifteen minutes for application results to be emailed to the patron, though there are cases in which this may take longer.



Keep an eye out for an email from us that will say something like:



Congratulations!

If you get this email, congrats, your application went through with no problems! We will provide you with your digital barcode and PIN number, so you can start using digital resources and our online catalog right away.



You Already Have a Card!

If you get this email, we will provide you with your barcode number, so you can start using digital resources and our online catalog right away. If you don't remember your PIN number or have trouble resetting it, please contact your library.



Oops!

If you get this email, we weren't able to verify your address automatically, which may happen for several reasons. Please contact your local library to see if we can figure out what went wrong and get you a card!



Can't Find the Email or Have Questions?

If you can't find any emails from us about your library card application, please check your spam and/or junk folders. If you're still unable to find it, please reach out to us by using our contact form here.

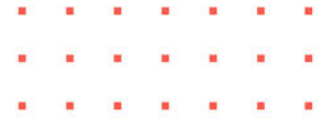


Need Another Card?

If you need to fill out another application for a child or family member, please fill out the form separately for each card.



Email Campaigns



All emails are customized with information Lakeland was given for Bibliocommons - the logos and links direct to each individual library. If you receive reports of missing logos or broken links, please contact Amber or Tech Help.

Emails are only sent to patrons, the library itself will not receive an email when someone applies for a card. This is why we will be sending monthly reports to each library of patrons who have been issued cards, so record fine-tuning can be done by hand.

There are four email campaigns - **verify**, **welcome**, **renew**, and **rising adult**. **Verify** emails are emails sent out after an application is submitted, with the results of the application. **Welcome** emails are a series of emails with library information sent out after an application is approved and a barcode is issued. **Renew** emails are email reminders sent 7 days before, 7 days after, and 30 days after cards expire with instructions on how to renew them (auto-renew forthcoming). **Rising Adult** emails are emails sent near a patron's 18th birthday, reminding them to switch their card to an adult card.




Email Outcomes

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). This email includes the patron's barcode, expiration date, and an explanation of what their PIN number is. The barcode is immediately usable for digital resources and databases. In addition to this vital information, there are tips on how to use their card. These emails are followed up with a series of welcome emails with more detailed information on how to utilize their card.



Congratulations on your new library card!

Barcode: 
Expiration Date: November 17, 2025
PIN: Last four digits of Phone number



Visit Your Library

Be sure to visit your library to get a physical card! Your physical card will allow you to check out items from any Lakeland Library!



eBooks and Audiobooks

Your new digital barcode gives you access to your library's digital collection of ebooks and audiobooks!



Digital Resources

Your digital barcode also gives you access to digital resources offered by your library. check their website for more information!

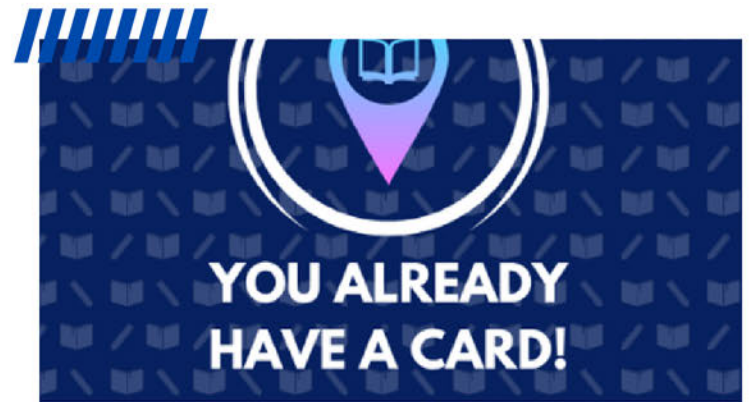
Have Questions or Need Help?

We're here for you and we would love to help you get the most out of the library. Please feel free to reach out to your library or to us at Lakeland if you need any assistance or have questions - we're happy to help!

Outcome 1
Card Issued

Email Outcomes

This email is issued when a patron's information matches up with an already-created record in Sierra. For this to happen, multiple identifying factors must match (i.e. name and birthdate and address). This email includes the patron's barcode number, expiration date, and explanation of what their PIN number originally was. This email also includes advice for how to reset their PIN number.



Congratulations, you already have a library card!

Barcode: [REDACTED]

Expiration Date: 2025-08-22

PIN: Last four digits of Phone unless changed

Resources

You now have access to your library's electronic resources - check their website to see what they offer, and dive into ebooks, audiobooks, databases, and more!



PIN Number

Last four digits of your phone number not working? Need assistance with your PIN number? Contact your library for assistance changing your PIN Number.

Outcome 2

Patron Already Has a Card

Email Outcomes

This email is issued when there was one or more issues with the application. This could be as simple as the patron is outside of the service area of the library they applied to, it could be that information provided is invalid or incorrect, or it could be a glitch. This email suggests the patron contact the library to see if library employees can figure out why the application failed. See the section “Troubleshooting an Oops Email” for advice on how to do this.



Sorry, something went wrong with your application.

Let's fix this!

Why Did This Happen?

Your application could get rejected for many reasons - information entered didn't quite match up to records, your address couldn't be verified within the library's service area, or something just went wrong.



What Do I Do Now?

Don't worry, a card may still be available to you. To figure out what went wrong, you can either reach out to Lakeland or contact the library you applied at for further assistance.

Outcome 3
Application Rejected

Patron Accounts



You'll notice a few things when you pull up the record of someone who registered with Patron Point. First, there will be a popup message notifying you that the patron was issued a barcode through Patron Point. The text is pulled from the application as the patron entered it - meaning that the name and address will likely need tweaking to comply with our record standards. You will also need to enter the decade of birth for the patron. Beyond editing the information to comply with standards, further changes will be up to each library (i.e. possibly changing the PMessage to a note, adding a message that the patron requires a physical card if they come in, etc).

The screenshot displays a library system interface. At the top, a grey header bar contains the following information:

PREFERRED NAME	Brown, Charlie	EMAIL ADDR	[REDACTED]
P BARCODE	[REDACTED]	ADDRESS	[REDACTED]
EXP DATE	11-22-2025		
BIRTH DATE	12-18-1998		Muskegon, MI [REDACTED]
P TYPE	SF Resident Adult		

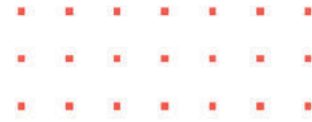
Below the header, a sidebar on the left lists various account metrics:

- Check Out: 0
- Checked-Out It...: 0
- Holds: 0
- Fines: \$0.00
- Check In: 0
- Linked Patrons: 0

The main content area is titled "Check Out" and features a table with columns for "Barcode" and "Title". A "Message" popup window is overlaid on the table, containing a yellow warning icon, the text "PATRON POINT REG", and an "OK" button.



Patron Accounts



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.

p24025859 Last Updated: 11-22-2022 Created: 11-22-2022 Revisions: 1

EXP DATE	11 - 22 - 2025	HOME LIBR	sf Fruitport District Lib	CUR ITEM D	0
PCODE1	- FIX DECADE OF E	PMESSAGE	q PATRON POINT REG	PCODE4	0 -
PCODE2	a ADULT	MBLOCK	- -	PAT AGENCY	45 Fruitport District Lib
PCODE3	0 None	CL RTRND	0	CIRCACTIVE	MM-DD- 20
P TYPE	257 SF Resident Ac	MONEY OWED	\$0.00	Notice Preference	- NONE
TOT CHKOUT	0	CUR ITEMA	0	Total Registrations	0
TOT RENWAL	0	CUR ITEMB	0	Total Programs Attended	0
CUR CHKOUT	0	ILL REQUES	0	Waitlists on Record	0
BIRTH DATE	12 - 18 - 1998	CUR ITEM C	0		

PREFERRED NAME	Brown, Charlie
LEGAL NAME	Brown, Charlie
ADDRESS	5 [REDACTED] [REDACTED]
TELEPHONE	616 [REDACTED]
MICH ID	S [REDACTED]
P BARCODE	2 [REDACTED]
EMAIL ADDR	amber@llccon.org

View-Only Mode

Monthly Reports



What's Included



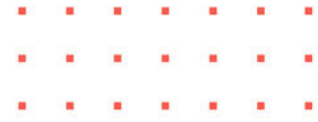
Monthly Reports will include the following information: Date Application Submitted, Email Address, First Name, Preferred First Name, Last Name, Address, Apartment, building, suite, unit, etc., City, ZIP Code, Birth Date, Phone Number, Government ID, Patron Type, Home Library, and Pat Agency.

How To Use



To use the monthly report, open the provided spreadsheet. Then, you can use the provided information to pull the patron up in Sierra. From there, format the text as necessary, add decade of birth, add PCODE4, and delete the Patron Point Registration PMESSAGE. The barcode issued is perfectly valid, so leave that alone, unless the patron comes in for a physical card. An optional step is to put a note in the record noting that the patron registered with Patron Point. I encourage all directors to come up with procedures for this process.

Reporting Issues & Questions



**TECH
HELP**

**EMAIL
AMBER**

- To report issues or ask questions, contact tech-help or email Amber at amber@llcoop.org
- Put **PATRON POINT** in the subject and/or the beginning of your message.
- Please be as specific as possible when describing your issue or your questions. Details to consider while reaching out:
 - The details of the issue - what happened, when it happened, patron name/pID if the application went through, etc
 - What part of the process did the issue occur in - application, Sierra, patron email
 - How urgent is the issue - does it affect the patron's ability to use resources