

LLC PATRON REGISTRATION/EDITING STANDARDS **FOR SIERRA CIRCULATION**

To register, a patron shall present a current, valid Michigan Driver's License, Michigan Identification Card, or Resident Alien Card documenting identity and current street address.

For more information on Exceptions, see the Circulation policies listed under MICH ID.

Fixed Fields In The Patron Record

Double clicking in the fixed fields will bring up a table. From that table, you can click on the value needed and then click **ok** to select that value for the field. Remember when issuing a permanent card, that you need to update all fields in the patron record.

EXP DATE

- Enter the expiration date of the patron's borrowing privileges. All regular patrons shall have an expiration date in their record that is no more than three years from the registration date. The renewal of an expiration date at the patron's home library can be for up to three years. If a patron's renewal date is changed at a library other than the home library that the renewal shall be for no more than 1 year.

PCODE1

- Enter the letter in front of the proper decade of birth for the patron, such as "i" for some born between 1990 and 1999 or "w" for institution.

PCODE2

- Enter "a" for adult, "j" for juvenile, "i" for institutions.

PCODE3

- Field is not used. It has 0-None in the field.

PTYPE

- Enter the number that corresponds to the patron type such as Resident adult or Resident juvenile for your library. Each library has their own set of patron types with a list of general types at the end of the entire list, e.g., **41** BH Resident adult, **82** IL Resident juvenile, **98** MA/MC local use nonresident, **200UM** student, **244** staff. *For KDL and GRPL patrons who wish to choose a home away from home, set this code to **64** for GRPL or **94** for KDL patrons. If your library does not participate in the home away from home service for KDL assign **91** or **92** depending on whether or not the patron is an adult or minor or **61** or **62** for GRPL patrons. For libraries with home library pickup agreements this field along with the home library field should be assigned to the pickup location of choice.*

BIRTH DATE

- Enter the patron's complete birth date, e.g., **06/07/1980**

PCODE4

- Enter the number that corresponds to the geographic area where the patron lives, e.g., **32** OC-Chester Township or **72** BF-Carlton Township. *For new KDL patrons it is acceptable to assign **192** to new KDL records, unless you are able to determine the patron's actual place of residence. For GRPL patrons assign **500**. For libraries with home library pickup agreements, this field should be assigned to the patron's legal place of residence.*

HOME LIBR

- Enter the two letter code of the registering library if you are prompted to enter one. In the case of a Temporary Card, the registering library is the patron's home library until the patron is issued a permanent card. Do not change this field to LL or to another home library. The library who issues the permanent card is responsible for fixing all fields in the patron record when the permanent card is issued, e.g., **ab**, **ho**. *For KDL and GRPL patrons who wish to choose a home away from home, set this code to your local two-letter code (**mg**, **ec**, etc). If your library does not participate in the home away from home service, enter new KDL patrons with a home library of **ku** and GRPL patrons with a home library of **gr**. For libraries with home library pickup agreements, this field along with the ptype should be changed to the pickup location of the patron's choice.*

PAT AGENCY

- Enter the agency of the registering library if you are prompted to enter this field. In the case of a Temporary Card, the registering library is the patron's agency until the patron is issued a permanent card. Do not change this field to Lakeland (44) or to another Patron Agency. The library who issues the permanent card is responsible for fixing all fields in the patron record when the permanent card is issued, e.g., 3-Muskegon Area District Library, 42-Hackley Public Library. *New KDL patrons should be set to **1-Kent District Library** and GRPL patrons should be set to **2-Grand Rapids Public Library**. For libraries with home library pickup agreements, the library serving the patron's legal place of residence should be designated.*

NOTICE PREFERENCE

- **NONE**. This field is *usually* **not** used on our system. The system has a built-in hierarchy to determine notice delivery. All patrons with email addresses will automatically be notified by email; the system will automatically default to email notices even if a phone number is present. All patrons whose telephone numbers do not have ##'s preceding the phone number will be called by MessageBee if they don't have an email address entered. All patrons with ##'s preceding their telephone numbers and no email addresses on their accounts will have notices sent to the print queue. Shoutbomb text alerts are not notices. Therefore, the system will send all notices via email, or phone (MessageBee), as scheduled regardless of whether a patron signs up for text alerts. If patrons

have an email address but prefer to be notified by MessageBee, enter the value **a** (PRINT) in this field and their notices will default to MessageBee. ***There is no PHONE option IN THIS FIELD BECAUSE SIERRA'S NATIVE PHONE NOTIFICATION (TNS) HAS BEEN DISABLED.***

MBLOCK

- Leave this field blank for most new patrons. If the patron you are registering is an Underfunded Contract Service Area, or MiLibraryCard borrower, choose the appropriate code (**m** or **u**). Setting these fields will block the patron from placing holds in the Lakeland catalog and stop patrons at self-checkout. If you are updating an existing patron record, do not overwrite or remove the “**c**” (Collection agency) block for any reason. ***As of January 2, 2020, the Nonresident block is no longer required, a Sierra software configuration is now in place to limit Nonresident borrower use to the issuing library.***

Variable Fields In The Patron Record

l LEGAL NAME (REQUIRED FOR COLLECTION AGENCY)

- **Use all caps** when entering a patron's legal name, including the middle initial, without a period. (Patrons who registered online via PatronPoint will not be in all caps.)
- Enter the patron's legal name from their ID in the form [LAST NAME, FIRST NAME MIDDLE INITIAL]
- Patron's last name should be entered as one word, with NO spaces.
- (Example, VANDER MEER should be VANDERMEER).
- This is the standard set by Lakeland.
- Hyphenated names should include hyphen with NO spaces.
- Enter a comma and a space after the last name (e.g., DOE, JANE J). Enter abbreviations (like, "Jr", "Sr", and "III") at the end of the middle name or middle initial (e.g., DEBOER, JOHN P, JR)

**DEBOER, JOHN P, JR
DOE, JOHN ADAM, III**

n PREFERRED NAME (REQUIRED FIELD FOR NOTICES)

- **This is a required field. If there is no preferred name, enter the legal name. Sierra will not allow users to save the record if this field is left blank.**
- **Use all caps** when entering a patron's preferred name.
- Enter the patron's preferred name in the field, i.e. JONES, TERI (preferred) vs. JONES, THERESA (legal) in the form [LAST NAME, FIRST NAME].
- Do not enter pronouns in this field because this field is used on system notices.
- Patron's last name should be entered as one word with NO spaces.
- (Example, VANDER MEER should be VANDERMEER).
- This is the standard set by Lakeland.
- Hyphenated names should include a hyphen with NO spaces.
- Enter a comma and a space after the last name (e.g., DOE, JANE J). Enter abbreviations (like, "Jr", "Sr", and "III") at the end of the middle name or middle initial (e.g., DEBOER, JOHN P, JR)

**DEBOER, JOHN P, JR
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a ADDRESS-MAILING

- **Use all caps.**
- **NO PUNCTUATION.**
- This must be the mailing address for the patron. A third line can be added to the address field by doing a right mouse click and selecting Insert New Address Line or by pressing the space bar and typing a \$. Other addresses can be added to the patron record using the ALT-ADDRESS field.

- Type the city, state, and zip code or use the appropriate function key for this field as determined by your library.
- These guidelines follow those set by the United States Post Office.

**123 ANY ST APT 3
PO BOX 123
GRAND RAPIDS MI 49505**

**PO BOX 123
GRAND RAPIDS MI 49505**

t TELEPHONE

- Enter the patron's phone number in the TELEPHONE field beginning with the area code in this format: **616-123-4567**
- If patrons do not wish to be called by the automated system, staff may place ##s in front of the phone number, e.g., ##616-123-4567.
- Include the AREA CODE for all phone numbers and enter the number with the dash.
- This number should be the patron's primary contact number. Other phone numbers must be entered as ALT PHONES.
- **DO NOT enter text into this field.** If the patron has no phone leave the field blank and optionally enter a note field explaining the patron has no phone. If this is a work number, enter that as a note as well. Do not enter the word "work" or other explanatory note after the telephone number.

u MICH ID

CIRC 2.2.1. Address and Identification Requirements.

- **To register, a patron shall present a current, valid Michigan Driver's License, Michigan Identification Card, or Resident Alien Card documenting identity and current street address.**
- Enter the patron's Michigan driver's license number or their Michigan State ID number in the MICH ID field, using NO spaces, like this: **A123456789012**
- Enter an out of state driver's license number in a Note Field.
- Enter any other government issued ID number (except Social Security number, which is not allowed) in a NOTE field.
- Acceptable alternate ID includes two of the following as listed in the Lakeland Circulation Policy.

CIRC 2.2.2. Exception 1.

If the patron cannot meet the requirement in CIRC 2.2.1, a credible photographic identification must be used to establish the person's correct, current name. Credible photographic identification means identification issued by an institution that will have made a determined effort to be sure that the person pictured and named on the identification is the person they claim to be. Examples of acceptable photographic identification are Military IDs, employment IDs, school IDs, and out-of-

state driver's licenses and passports. IN ADDITION to a credible photographic identification, the person registering must provide one of the following to corroborate the name and establish the current street address:

- 1) Voter registration card;
- 2) Recent utility bill;
- 3) Hospitalization, insurance card or automobile registration;
- 4) Printed check;
- 5) Recent local property tax bill

(NOTE: Under Exception 1, a person must provide TWO specific documents. One is a photographic identification of the kind specified and the other is one of the specified documents used to establish the current street address of THAT person).

CIRC 2.2.3. Exception 2.

By local option, the library may use one of the photographic identifications listed in Exception 1 to verify identity, AND mail the library card, return service requested, to the patron to verify the actual local street address. The library shall limit circulation to its own materials under this provision until the patron presents the valid card at an LLC member library. Under this exception, the registering library must place a message on the patron's account – including the date that the card was mailed – and upon presentation of the card at an LLC member library, that library shall remove the message. A block shall be placed on the patron account if the mailed card is returned to the registering library.

CIRC 2.3 Registration of Juveniles

CIRC 2.3.1. Juveniles with a parent or guardian present.

Patrons under the age of 18 may be issued library cards provided a parent or legal guardian co-signer is present at the library and willing to accept financial and supervisory responsibility for the card's use. The co-signer must meet the registration requirements in CIRC 2.2.1 or CIRC 2.2.2 regarding identity and current street address verification. If the co-signer does not reside at the same street address as the patron being registered, the co-signer's street address shall be entered in the alternative address field of the patron record.

CIRC 2.5 Alternative Registration

If a member library in the LLC Shared ILS does not comply with Lakeland Library Cooperative Registration or Circulation Policies and Procedures, that member library will be financially responsible to the owning library for any lost or damaged materials. Member libraries must note on the patron record when a card is issued not in accordance with the Patron Registration Policy with the note "Alternative Registration" along with the date, library code and the initials or name of the staff member entering the registration. If a juvenile is registered without a parent or legal guardian present, **include this note on the patron account: "Co-signer's ID not confirmed," with the date, library code and the initials or name of the staff member entering the registration.**

For more information about acceptable forms of identification, see “Circ 2 Patron Registration” in the Circulation Policies document under the ILS information page on Lakeland Library Cooperative’s website at <https://llcoop.org/ils-information/>

g GUARDIAN

- Enter adult's name in the GUARDIAN field.
- It is acceptable and defined by local policy if a library will allow two co-signers. If so, then enter a second GUARDIAN field with the other co-signer’s name.

i GUARD. ID

- Enter the adult's MICH ID in this field. The system check for duplicates does not check this field.
- If there are two co-signers, enter the second GUARD.ID in a separate GUARD.ID field.
- It is also acceptable to enter the Guardian ID in the MICH ID field. This will allow the system check for duplicate IDs to return other patrons for which the guardian has also co-signed.

b BARCODE

- Scan the barcode in the BARCODE field of the patron record.
- All patron records must be assigned a barcode. This field must not be left blank.
- Patrons should have only one active barcode. When replacing a card or re-registering a patron who has moved, other barcode fields should be changed to NOTE (x) fields and add the month and year when this occurred.

= PIN

- As new patrons are added, member libraries are required to add a default PIN to the record.
- PINs must be 4-digit numeric numbers.
- If patrons forget their PIN, staff will delete the entire PIN field from the patron record and add a new one. Optionally patrons with email notification may use the “Forget your PIN” option in the online catalog.

i INITIALS

- Type the 2-letter code for your library followed by a forward slash and then your initials.

ab/mp

ADDITIONAL VARIABLE FIELDS THAT CAN BE ADDED TO THE PATRON RECORD

To enter additional fields, click on the Insert button located on the Toolbar. Use the drop down arrow to see the field names and select the one you want to use.

h ALT ADDRESS

- If the patron has more than one address, enter their alternate address in this field (e.g., street address if a patron uses a PO Box, a college student's home address, or a patron's seasonal home address). For entry standards see Address above.
- **Use all caps.**
- **NO PUNCTUATION.**
- This field is optional.
- Enter the patron's alternate city/state/zip in this field.

p ALT TELEPHONE

- Enter the patron's primary phone number in TELEPHONE field. See above.
- Use this field if the patron provides more than one telephone number.
- Include the AREA CODE for all phone numbers and enter the number with the dash, e.g., **616-999-8765**

z E-MAIL ADDRESS

- * Enter the patron's e-mail address in this field.
- * Multiple email addresses can be added to the same email field using a comma separator (i.e. name@provider.com, name2@provider.com)

m MESSAGE

- Enter information in this field that needs to come up each time the patron uses their card (e.g., wallet found in library). Remove these messages when the situation is resolved. Please do not add unnecessary information.
- Sierra will also add messages to the patron record for such things as claims returned, lost item, etc.

w Patron Signature

- Do not enter or update data in this field.
- This field is used by the Digital Signatures product to store the system address of the image of the patron's signature. Member libraries who have purchased access to the Digital Signatures product will be able to capture patron signatures using the Digital Signature pads and to view the images. Libraries who do not have access to the product will not be authorized to view the signature image. The system stores a system image location in this field, e.g., **signature:012650:20130725145134**

x NOTE

- In this field, enter any additional information necessary for a more complete patron record but do not add anything unnecessary.
- When information is entered into this field, it must include the date and INITIALS (see INITIALS above).
- Old barcodes should be changed to NOTE fields and include the month and year it was changed (such as 12345678901234 06/25)

Procedures for Non-Resident Patron Registration

NR 2.0 Non-Resident Cards

- 2.1. Each Participating Library may make available to non-residents, per its own local policy, a card restricted to use only at that library with the Lakeland universal nonresident barcode prefix “2 0000” if the library does not want to allow access to its digital resources. For libraries that want to offer access to digital resources, they may issue the standard Lakeland non-resident pink card with their local barcode affixed. For stand-alone libraries a card that is a different color from their standard borrower card should be issued and be identified as a non-resident card.
- 2.2. Each Participating Library shall set its own fee for non-resident card, with the proceeds from such fee being retained at that library.
- 2.3. Non-resident borrower shall be able to borrow only materials owned by the local library from which the non-resident card was issued.
- 2.4. Non-residents may obtain cards at as many participating libraries as they wish, paying applicable fees at each library. Each non-resident card issued will have a separate record in the Shared ILS.
- 2.5. Responsibility for materials borrowed using a non-resident card rests with the library at which the materials are checked out unless the registering library has not identified that patron as a non-resident according to NR 2.1 above. In that case, the registering library will be financially responsible to the owning library for any collection agency fees and lost or damaged materials.
- 2.6. Each non-resident card will expire no more than one (1) year from the date of issue. Participating libraries will decide whether or not to pro-rate any fees collected for cards issued throughout the year.

Procedures for Temporary Patron Registration

CIRC 2.8 Temporary Patron Registration

Each participating library in the LLC Shared ILS may make available a universal temporary library card for libraries to issue to other member libraries’ patrons or non-Lakeland visitors. The issuing library will apply the minimum standards for patron registration as outlined by CIRC 2.2.1, 2.3.1 and 2.4 (None of the patron registration exceptions are allowable for temporary registration.)

Requirements and Services:

- 1) Temporary cards will automatically expire sixty (60) days from the date of issuance.
- 2) A temporary card can only be issued once system-wide and only at one library with the expectation that the user will return to their home library to apply for a permanent card. Users cannot apply for temporary cards at multiple libraries.
- 3) A temporary card cannot be extended under any circumstances.
- 4) Temporary cards will remain in the Lakeland Library Cooperative system patron files for three (3) years unless fines or fees exist.
- 5) The issuing library staff will check the patron database so a duplicate patron temporary card is never issued.

- 6) The issuing library takes full responsibility for temporary card users and will retain the registration form.
- 7) Temporary card holders may not place holds on material and utilize the interlibrary loan feature.
- 8) By local option, libraries may restrict circulation to temporary card holders.

Additional Procedures

1. Libraries may select the “t” PMESSAGE to indicate that the borrower is using a temporary card or add an “m” Message indicating this is a temporary card. In either case a pop-up will remind staff at checkout that the registration is a temporary card.

Procedures for Underfunded Contract Service Area Patron Registration

CS 2.0 Underfunded Contract Service Area Patron Cards

2.1. Participating Libraries issuing cards under this policy are responsible for meeting the requirements for library service as provided by Michigan Law.

2.2. Each Participating Library will make available to its patrons in contract service areas a card restricted to use only at that library if the support to the participating library is less than the equivalent of 0.3 mil on the local taxable value.

2.3. Each registered contract service area patron will be allowed to place holds for pickup only at that library on materials owned by that library.

2.4. Underfunded Contract Service Area Cards will expire with the expiration date of the service contract or if no contract expiration date exists may not be issued or renewed for more than one (1) year at a time.

2.5. Underfunded Contract Service Area Patron Cards may or may not be honored at other Participating Libraries.

Additional Procedures

1. For Underfunded Contract Service Area patrons who want specific titles, place copy specific holds on an item owned by your library.
2. For Underfunded Contract Service Area patrons, an Mblock should be set in the patron record. Use “u” for Cont Serv Patr.
3. For Underfunded Contract Service Area patrons who wish to place a request via MeLCat, staff will temporarily remove the MBLOCK to allow a patron to place a MeLCat request. After the request is placed, staff must immediately reset the MBLOCK.

Procedures for merging patrons records when one or both records have a Collection Agency Block

Merging patron records causes some problems when we send patrons to Unique. If you merge a patron record that has a collection block with one that does not, it reports the first record to

Unique as a Paid in Full account since it no longer exists on the system. Here are the procedures to follow when merging patron records.

The **Source** Record is the record FROM which field will be moved.
The **Destination** Record is the record TO which fields will be moved.

If patron records need to be merged, please check to see if the collection agency block is in either or both patron records.

If only one patron record has the collection agency block, keep that record as the **Destination** record updating it as needed and then merge the one without the collection block, the **Source** record, onto the **Destination** record.

If both records have the collection block, please put a **message** in the **Destination** record stating “Patron record .xxxxxxx (the patron ID number from the **Source** Record) was in collections and merged with the current patron” including your library two letter code, staff initials, and date.