V.   SECTION V PATRON RECORD AND REGISTRATION

Contents

A. INFORMATION ABOUT PATRON RECORDS

Patron record basics
- There is one patron database that is shared by all LINKcat libraries (400,000+ patron records).

- Library staff can create or modify records for patrons living inside of and outside of their community. Library staff can also update/modify the patron record of any patron in the database.

- Patrons may use their library card at any LINKcat library.

- To avoid creating duplicate records, library staff MUST remember to search using the patron's full name, variations on their name and then doing a truncated name search (to get a list to review) before adding a new record. Use the Advanced Patron Search functionality to search multiple fields at the same time (i.e. surname and birthdate).

- Use the patron's full name when entering the record: lastname, firstname provides the most accurate results.

- It is essential that all the data in patron records is entered correctly:
  - **Confirm all entries for correct spelling, street numbers and phone numbers before saving the record**.
  - Read Part C for the recommended Data Entry Format for patron records.

- Many of the fields in patron records are used for reporting and statistical information.

- The barcode is not the main key to the patron record; it can be changed, like the address or telephone number. The patron's borrower number is the key since it never changes.

- Library barcodes are replaceable, and the system saves the previous number for reference.

- Any time library staff create or modify a record in the patron database, follow these basic procedures.
  - Whenever you issue a new card or replace a lost card, the patron must furnish valid forms of ID. If it is not available, do not proceed with registration and do not make a lost card active again. Request that the patron return with proper ID in order to get a card. A list of valid forms of ID is in Part D of this Section.
    - If you are just confirming a change of address or renewing an expired or soon to be expired card, you may or may not require photo ID, *according to your local library's policy*.
  - If valid ID is available to verify identity and address, have the patron complete the SCLS patron registration form.
  - Check the Bibliovation patron database for a prior entry. **If there is a prior record, update that record rather than create a new one.**
  - Proceed with patron registration following the procedures detailed in Parts D and E of this section.
  - After completing the registration process, verify that the record has been successfully

entered and exists in the database.

   o   Confirm that the patron understands that they are responsible for all items checked out
       to and possible charges incurred by this library card.
   o   Hand your patron their library card and have them sign it.

● Place of residence - There are several registration situations, depending on where the patron
  resides (See Part E of this Section).

B.   HOW TO SEARCH FOR PATRON RECORDS TO AVOID DUPLICATION OF RECORDS

BEFORE creating a new record, use one or more of the patron searching features to search for the
patron to prevent duplicate records

To get to the main Patrons page, click on the Patrons link on the top of the screen. The main Patrons
page lists three patron searching options:

   1.   **Search Patrons** feature in the page banner aka **Banner Search**
The banner search box sort order defaults to Surname, with the options to sort by Cardnumber. First
and last names can be entered in any order and names can be truncated.

Example of searching in the banner search field: Entering tim johns or johns tim will get the same search
results and will include all trailing characters after the m in tim and the s in johns (so Tim, Timothy,
Timoteo, Johnson, Johnston, etc. would be included in your results)

   2.   **Browse by last name**
This feature allows you to browse a list of patrons whose last names begin with the same letter. You
may use this feature to double check for mildly misspelled names or a variation in the spelling of a
surname

   3.   **Advanced Patron Search**
Almost every field in a patron record is searchable using this feature. You can search one data field or
multiple fields at the same time. Use this feature to search for unique identifiers in the patron record
(like birthdate, email, phone number, borrower number, or address).

Patron Identity

Search Patrons

Borrower number: [　　　　　]
Borrower Cardnumber: [　　　　　]
Surname: [　　　　　]
Firstname: [　　　　　]
Patron Branch: [All Branches ▾]
Category: [All Categories ▾]
DL Login: [　　　　] ☐ No Value
Sort Field 1: [　　　　] ☐ No Value
Sort Field 2: [　　　　] ☐ No Value

Registration

After Date: [　　　] 🔲
Before Date: [　　　] 🔲

Expiry

After Date: [　　　] 🔲
Before Date: [　　　] 🔲

Date of Birth

After Date: [　　　] 🔲
Before Date: [　　　] 🔲

Main Address

Address: [　　　　　]
City, State: [　　　　　]
Zip Code: [　　　　　]

Alternate Address

Address: [　　　　　]
City, State: [　　　　　]
Zip Code: [　　　　　]

Contact

Email (Home): [　　　　] ☐ No Value
Email (Work): [　　　　] ☐ No Value
Phone: [　　　　] ☐ No Value

Notes

DL Note: [　　　　　]
Circulation Note: [　　　　　]

Flags

☐ Debarred:
☐ Gone, No Address:
☐ Lost Card:

Search Patrons   ☐ Add Results to a List [A New List Named ▾] [　　　　　]

You can use truncation to find all the patrons that start with that specific character string in that particular field.

For example:
If you are trying to find all the patron records that have the last name of Olsen or Olson or Olsonn that live in the City of Stoughton, you could enter the following in each of the needed fields:

In the Patron Identity area
Surname = Ols
In the Main Address area
City, State = STOUGHTON WI

Using truncation (only typing the first part of the name) in the Surname field will yield results that **start with that character string**.

Patron Identity:
- Borrower number: Bibliovation borrower number, never changes.
- Borrower Cardnumber: patron barcode; can change when cards become lost and are replaced.
- Surname: patron last name or Organization name
- Firstname: patron first name
- Patron Branch: library in patron's record; also default pickup location
- Category: patron category: Adult, Juvenile, Organization, etc.
- DL login: patron barcode
- Sort Field 1: patron's residential code (aka PSTAT)
- Sort Field 2: occasionally used for special projects, otherwise do not use

The next three search fields can be used in conjunction to narrow down a search for a specific date:

Registration:
- After Date: select patrons who registered after a particular date
- Before date: select patrons who registered before a particular date
- When searching for patrons who registered at a specific library on a particular date, you can set parameters in fields to narrow your search. For examples, to find a patron who registered at BAR on 4/1/2011, set the following
  - Patron Branch = BAR,
  - Registration After Date = "03/31/2011 and
  - Registration before date = "04/01/2011"
- You will extract a list of patrons with a Home library of BAR and a registration date of 04/01/2011.

Expiry:
- After Date: select patrons whose records expired or will expire after a particular date
- Before date: select patrons whose records expired or will expire before a particular date

Date of Birth: use the mm/dd/yyyy format.
- After Date: select patrons with a birthdate after a particular date.
- Before date: select patrons with a birthdate before a particular date
- When searching for a specific day, enter the same date in both fields. Example: After Date: 03/14/1960; Before Date: 03/14/1960 – you will get a list of patrons with that birthdate.

1. ENTRY FORMAT FOR PATRON RECORDS

In order to simplify data entry and to facilitate data extraction, please use these guidelines and abbreviations when you are entering patron records:

1. Use all CAPITAL LETTERS when entering the patron name and address information.

2. Do not use any punctuation in the patron name and address fields

3. **In the First name** field: enter first name as it appears on the library card application (under "Name:"), AND patron's full middle name or initial if shown on ID or provided on application.

4. **In the Surname (Last name) field:** If the patron has a name suffix (Jr., Sr., III), enter the suffix after the last name in the Surname field. Example: **HOWELL III** (no period after the suffix and no comma after the last name).
   a. For names with apostrophes—do not use the apostrophe and do not leave a space. Example: OMALLEY
   b. For names that have St or Saint –do not use the period but do leave a space between the ST and the rest of the name (treat it as two last names). Example: ST ARNOLD
   c. For names that may appear to have spaces between parts of the name---do not leave spaces in the database. Example: Van Der Wall becomes VANDERWAL in our database. (This will make it easier for the truncated holds slips as well)
   d. For double last names—do not use a hyphen but do leave a space between the two names. Example: HILLS MEYER

5. In the **Other Name** field: **(use only if patron filled out the Name on Photo ID section of application and it differs from Surname and/or First name on the app)**: enter the full name as it appears on the photo ID in the following format: first name, middle name or initial, last name.

6. If only a cell phone number is provided—put it in the **Phone (primary)** field (this way it appears on the left side of the cko screen).

7. Use the Common Postal Abbreviations listed below for street and directional designations. A full list of all USPS road abbreviations is also posted on our CODES webpage.
   incorrect format: 1234 SOUTH GRAND CANYON DRIVE
   correct format: 1234 S GRAND CANYON DR

Here are two lists of common road abbreviations. For the entire list of USPS road abbreviations refer to the document "Highway designation and road abbreviations" posted on the ILS Support/Codes web page. Based on the US Postal Service and the US Census Bureau highway designations, the following are recommended for data entry in our database:

AVE	Avenue	**MTN**	Mountain	**WAY**	Way
BLVD	Boulevard	**PKWY**	Parkway	**RM**	Room
CTR	Center	**PL**	Place	**STE**	Suite
CIR	Circle	**PLZ**	Plaza	**N**	North
CT	Court	**RDG**	Ridge	**E**	East
DR	Driveway	**RD**	Road	**S**	South
EXPY	Expressway	**SQ**	Square	**W**	West
HTS	Heights	**ST**	Street	**NE**	Northeast
HWY	Highway	**STN**	Station	**NW**	Northwest
IS	Island	**TER**	Terrace	**SE**	Southeast
JCT	Junction	**TRL**	Trail	**SW**	Southwest
LK	Lake	**TPKE**	Turnpike		
LN	Lane	**VLY**	Valley		

HIGHWAY DESIGNATIONS
COUNTY RD
HWY
COUNTY HWY
STATE HWY
US HIGHWAY
Lettered highways are County highways or County roads. Numbered highways are US highways or State highways.

8. Use the # symbol to indicate the apartment, suite or trailer number.
   incorrect format: 555 RIMROCK ROAD Apt. 15
   correct format: 555 RIMROCK RD # 15 USPS states that if you use the number symbol you should place a space between the symbol and the number.

9. Enter the number of the apartment on the same line as the street address if possible.
   incorrect format: 1414 MOCKINGBIRD LANE
                    APT. 13
   correct format: 1414 MOCKINGBIRD LN # 13

10. You can choose the City, State from the pull-down menu or type it in (do not use a comma between the city and state). You may have to re-enter the ZIP code, if the city has multiple ZIP codes.

C.   SCLS GUIDELINES FOR REGISTERING PATRONS

SCLS has developed guidelines for patron registration procedures, to ensure consistency within the System, within LINKcat libraries and within non-LINKcat libraries. These guidelines will assist libraries in dealing with registration of patrons other than those who reside within the taxing jurisdiction of their

library. In January 1999, PLAC (now the SCLS Administrative Council) adopted the following guidelines for registering patrons from other libraries. All SCLS libraries should follow these guidelines when registering patrons.

These guidelines have been developed in an effort to standardize library card registration procedures throughout the system. They are intended to facilitate the acceptance of library card registration forms from one another's patrons. As such, they should be regarded as minimum standards which don't supersede stricter local standards. A common registration form, available in English and Spanish, is provided for use in all libraries.

DEFINITIONS:
SCLS – South Central Library System
LINKcat libraries – term used to describe the group of libraries sharing the Bibliovation ILS. LINKcat is the public name of the shared Bibliovation software and Public Access Catalog (PAC)/Discovery Layer.
Non-LINKcat libraries – term to describe libraries not part of the Bibliovation ILS database.
ILS – Integrated Library System – software used by libraries for circulation, cataloging, online catalog, serials and acquisitions.

The following guidelines should be considered basic precepts for SCLS library card registration:
  a. Libraries should provide patrons with cards rather than keeping cards on file at the library.
  b. SCLS library patrons should have only one library card per ILS.
  c. Non-SCLS library patrons can be registered according to these guidelines.
  d. LINKcat libraries should follow LINKcat procedures when registering patrons in the Bibliovation database. For LINKcat libraries, a library of residence is defined as the library in the municipality in which the patron has a legal place of residence.

  ● Procedures for accepting adult registrations (18 and over):
    o If the patron wants to check out materials at the time of registration, a photo ID and proof of address must be furnished.
    o If the patron does not have proof of address, they may not be allowed to check out materials at the time of registration. The library card may be mailed to the address given by the patron, based on local library policy. This will serve as verification of the address.

Below are listed several forms of acceptable identification, varying in their validity for verifying name and/or address. Remember: A Photo ID of some sort is required.

Acceptable forms of ID **for verifying name and/or address**:

Type of ID	Valid for Name	Valid for Address
current Driver's license	yes	yes
current State ID card	yes	yes
current Military ID with photo	yes	yes
current Student ID with photo	yes	no

current Permanent Resident card	yes	yes
current Employer ID with photo	yes	no
current Credit card with photo	yes	no
Hunting or fishing license	no	yes
Checkbook	no	yes
Utility bill	no	yes
Mail at current address; postmarked within 30 days.	no	yes
Current lease or mortgage	no	yes

- Procedures for accepting juvenile and young adult registrations:
    - If an applicant is considered a juvenile per local library policy, a parent or legal guardian identification and signature may be required.
    - LINKcat policy is one library card per patron, regardless of age.
    - A library staff member should search their patron database for the patron's name (including previous names), using a variety of spellings, to avoid adding a duplicate record. Ask if they have ever previously had a library card.

- After the patron has completed the registration form and is still at the registration desk, library staff should confirm that all required data (name, address, birthdate) has been filled in and that the data matches the information on the photo ID. Verify their email address (if submitted) and assign them a PIN if they do not have a 4 digit numeric number they want to use. *(Currently the birthdate is not a required field)

- A registration form for an individual should be sent to the patron's library of residence, which is based on their legal place of residence and/or their PSTAT. A registration form for an organization (teacher, school, business) should be sent to the library in the municipality in which the organization is located.
    - When the registration form is received at the library of residence, staff should re-search the patron database to confirm that the new record is not a duplicate.
    - Staff should confirm that the correct PSTAT has been entered in the record.
    - The PSTAT for an organizational record, like a card for a teacher at a school, should be based on the municipality in which the organization is located.

- If a patron reports an address or name change, have the patron complete a new registration form, noting the former name and/or address and barcode number on the registration form. This information may then be entered immediately into the Bibliovation database. The form should be marked "CHANGE" and sent to the patron's library of residence.

- If a patron reports a lost card, mark their patron record to reflect this, and a new registration form should be completed. A replacement cost may be charged and collected at that time. The form should be marked "LOST CARD" and sent to the patron's library of residence. Bibliovation libraries can mark the barcode "Lost" in the patron database. **The CSS is still discussing whether this procedure is necessary.**

Part D revised by PLAC Dec. 2009
CSC revised Nov. 2012
AC approved Jan. 2013
<mark>CSS revised mm/yyy</mark>
<mark>AC approved mm/yyy</mark>

D. SUMMARY OF VARIOUS REGISTRATION SCENARIOS

For ALL patron registrations, be sure to follow the general SCLS guidelines listed above. These guidelines apply to registration at all SCLS ILS libraries regardless of LINKcat membership. You should also follow the basic registration steps listed in Part A: Information about Patron Records.

Patrons who come to your library to register for a library card will fall into different categories depending on their place of residence. Listed below are the various registration situations you may encounter, along with a procedural summary for each. Remember that a library's "district" includes all municipal divisions that pay taxes to support that library. Patrons who reside in that district are considered "resident" patrons of the library; all others are considered "non-residents." In light of the current efforts to determine "resident" and "non-resident" use of a library, please ensure that the PSTAT accurately reflects the patron's legal place of residence.

Here are different patron registration situations and the general procedures to follow for each situation. Refer to earlier portions of the manual for more information on entering data in the patron record.

1. Patron resides in your own library's district - each LINKcat library should have policies and procedures for handling the registration of patrons who reside in their library district.
   a. New card - Check ID and proof of address, enter information into Bibliovation patron record, and issue patron card.
   b. Lost card - Follow procedure for providing new card, and replace "Lost" barcode (see Part M: Replacing a Patron Barcode).
   c. Renewal - Verify patron information, update patron record if necessary and renew the patron record.
   d. Patron is not carrying card - follow your local policy.
   e. Patron just moved into your district - what to do with their old card?
      i. If from a LINKcat library, patrons may continue to use their old card if they would like, update patron record as needed. If replacing card, destroy old card.
      ii. If from a non-LINKcat library, you may, if the patron no longer wants the card, send it back to the patron's original Home library so they may update their records.

2. Patron resides in the district of another SCLS ILS library. Refer to your list of SCLS libraries. Remember that any patron residing anywhere in Adams County, Portage County or in rural areas of Dane County, should be regarded as residing within the district of a LINKcat library. For patrons residing in rural areas of other SCLS counties, see 3 and 4 below.
   a. New card - Check ID and proof of address, enter in Bibliovation, issue library card and send registration form to patron's Home" library for their records.
   b. Lost card - Follow procedure for providing new card, and replace "Lost" barcode (see

Part M: Replacing a Patron Barcode).

    c. Renewal - Verify patron information, update patron record if necessary and renew the patron record.

    d. Moved - Depending on where they moved to, check ID and proof of address, and act accordingly.

    e. Patron is not carrying card - follow your local policy.

3. Patron resides in the district of an SCLS non-LINKcat library. Refer to the [SCLS Member Library Directory](#) for up-to-date information.

    a. Has card from their home library, but without a LINKcat barcode - Check photo ID and proof of address, enter in Bibliovation, place barcode on card they are carrying.

    b. Patron does not have their card with them - Check ID and proof of address, enter in Bibliovation, and issue the patron a library card.

    c. Renewal - Verify patron information, update patron record if necessary and renew the patron record.

4. Patron resides in SCLS but does not reside in a district that supports a library. This area includes rural Columbia, Green, Sauk, and Wood. Patrons in this category may be treated in several ways, depending on their county.

    a. If the patron is from your county and you have a supply of county cards you can follow the rules for a new card (1 a) and either issue your library's card or a county card.

    b. If patron is not from your county but is from Columbia, Green, or Sauk counties:

        i. Check ID and proof of address, and enter information in Bibliovation.

        ii. Issue your library card or county card, if you have one.

        iii. Send the completed patron application to the county resource library (Columbia Co - Portage PL; Green Co - Monroe PL; Sauk Co - Baraboo PL) for their records.

    c. If the patron is not from your county but is from Wood County: Wood County does not issue a county card, but MCM acts as county resource library.

        i. Check ID and proof of address, and enter information in Bibliovation.

        ii. Issue a library card from your library.

        iii. Send the completed patron application to Wisconsin Rapids PL for their records.

5. Patron resides in a WI library system that has reciprocal borrowing privileges with SCLS. Reciprocal borrowing privileges means that SCLS libraries agree to honor library cards from other library systems and these other systems will honor our patron cards. [This includes all library systems in Wisconsin other than Milwaukee County.]

    a. If the patron has their card from their home library/System.

        i. Have the patron fill out a patron registration form.

        ii. Require photo ID.

        iii. Require proof of address.

        iv. After entering the patron information in Bibliovation, place the LINKcat barcode on their Home library/System card or issue them a library card from your library.

    b. If the patron does not have a home library card with them, the library has several options, including but not limited to the following:

        i. Do not allow registration or checkout.

        ii. Allow the patron to register and provide them with a card from your library.

        iii. Allow the patron to register and purchase a Deposit card.

      iv.   Allow the patron to register and purchase a Membership.

6. Patron resides in Milwaukee County Federated Library System, a system that has no reciprocal borrowing privileges with SCLS. You are not required to lend any materials to these patrons or to take their registration; whether or not you choose to register these patrons depends on your local library policy. If your library allows registration of patrons living in Milwaukee County, follow these steps:
   a. If the patron has their card from their home library/System.
      i. Have the patron fill out a patron registration form.
      ii. Require photo ID.
      iii. Require proof of address.
      iv. After entering the patron information in Bibliovation, place the LINKcat barcode on their Home library/System card.
   b. If the patron does not have a home library card with them, the library has several options, including but not limited to the following:
      i. Do not allow registration or checkout.
      ii. Allow the patron to register and provide them with a card from your library.
      iii. Allow the patron to register and purchase a Deposit card.
      iv. Allow the patron to register and purchase a Membership.

7. Patron resides in another state. You are not required to lend any materials to these patrons or to take their registration; whether or not you choose to register these patrons depends on your local library policy. If your library allows registration of patrons living out of state, follow these steps:
   a. If the patron has their card from their home library/System:
      i. Have patron fill out patron registration form.
      ii. Require photo ID.
      iii. Require proof of address.
      iv. After entering the patron information in Bibliovation, place the barcode on their Home library/System card.
   b. If the patron does not have a home library card with them, the library has several options, including but not limited to the following:
      i. Do not allow registration or checkout.
      ii. Allow the patron to register and provide them with a card from your library.
      iii. Allow patron to register and purchase a Deposit card.
      iv. Allow patron to register and purchase a Membership.

<u>Fields in the patron record</u>
Here is a list and an explanation of all the fields in a Bibliovation patron record in the order found in the New Patron template. Required fields are in red. Different Patron Categories have slightly different templates.

NOTE: the "Add New Patron" link in the left sidebar is now functional, but defaults to the Adult patron form.

From the main Patrons screen, click on the New button and select the patron category for the record you are creating.
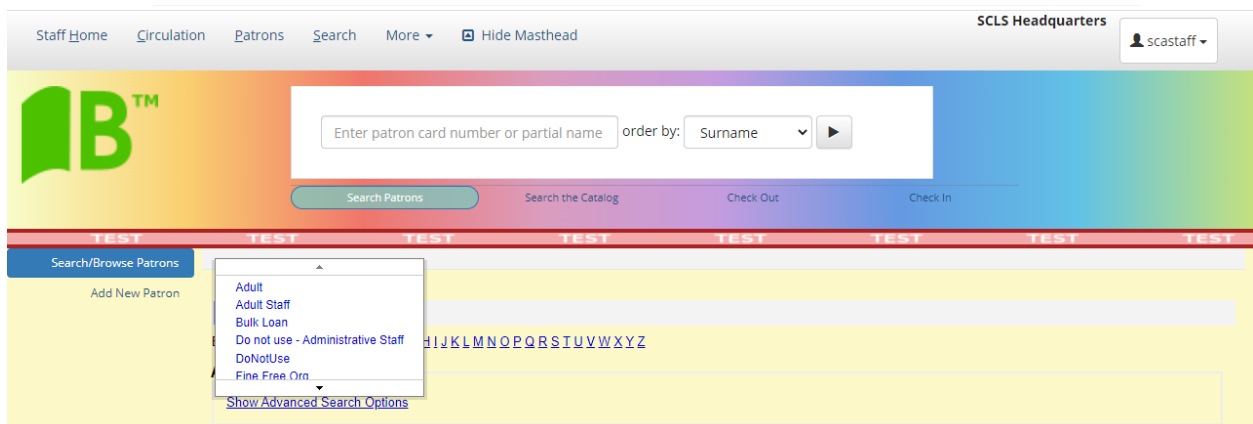
For this example, I have selected "Adult". The "Add New Patron" screen in Bibliovation 7.02 is arranged in a different order than previous versions.

Library Management:
- Category: The Patron Category works in conjunction with the item type to set the Circulation Issuing Rules for each library. See Section X Circulation Codes and settings for more information about these codes and rules.
- Card number [*Required field*]: patron's barcode number
- Library: patrons' preferred pickup location, select name of library from pull-down list.
- Sort 1 [*Required field*]: Patron Statistical Information/PSTAT – we use this field to define the patron's legal residence by a code. That code may be the municipality's Census Tract, city District, city Ward or other code. Use the pull-down list to select the correct name of the municipality that the patron lives in.
- Sort 2: Unused at this time.

Patron Identity –use CAPITAL LETTERS when entering patron data.
- Surname [*Required field*]: Enter patron's Last name [NO COMMA].
    - If the patron has a name suffix (Jr, Sr, III), enter the suffix after the last name in the Surname field. Example: HOWELL III (no comma before, no period after the suffix)
- First name [*Required field*]: Enter patron's First name and Middle name or Middle initial.
    - If the patron has a "daily" name, that they prefer to use that is different from their

identification, place their name in this field.
- o If entering only the Middle initial, place a period after it.
- ● Birth date: use the Calendar widget or enter the date as YYYY-MM-DD or DD/MM/YYYY. The form will only accept these date formats. This is not a Required field but is very useful as a unique identifier for patrons.
- ● Initials: Enter a Middle Initial for use in Hold Found slips.
- ● Other name: If the patron has a name different from their identification, place the name in the "Surname" and/or the "Firstname" fields and the full name from their Photo ID in the "Other name" field.
- ● [Gender]: Female, Male or N/A: NOT REQUIRED. Leave as N/A unless your local library policy requires a gender. Use N/A for other libraries, businesses, organizations, or institutions.

Guarantor information – these fields will display for all patron records as part of the Patron Group functionality. You do not need to fill in this section when creating a new patron unless you want to link a Juvenile record to an Adult record.
- ● Surname
- ● First name
- ● Relationship

Main Address: *this is the patron's MAILING address*
- ● Address [*Required field*]: Primary mailing address. Enter the street number and name in this field, including apartment or building numbers.
- ● City, State: manually enter the city and state in this field OR choose the City/State combination from the pull-down menu on the right. There may be multiple city listings in the pull-down menu – you will have to confirm the correct zip code.
  - o IF you do not select a City from the pull-down menu, enter the data as CITY ST (e.g. BARABOO WI). Do NOT place a comma between the city and state.
- ● Zip/Postal Code
- ● Country: DO NOT USE

Contact: contact information; how to contact the patron.
- ● Phone (primary): enter using the xxx-xxx-xxxx format for phone hold notices. **Note: For all phone number fields, you must use a 10-digit phone number and include the area code.**
- ● Phone (secondary): enter using the xxx-xxx-xxxx format.
- ● Phone (cell): enter using the xxx-xxx-xxxx format. Use this field for a cell number that is NOT the primary phone number.
- ● SMS alert (cell): not used for delivering text messages.
- ● Email (primary): enter using lowercase letters. Staff can enter multiple email addresses, separated by a comma or semicolon (;) and the patron will receive the notices at both addresses.
- ● Email (secondary): enter using lower case
- ● Fax: enter using the xxx-xxx-xxxx format

Alternate Address: Use for the patron's RESIDENTIAL address when the mailing address is a P.O. Box. These fields are also used by the Juvenile patron template and the Organization patron template to display Guarantor information (if the accounts are linked) or alternate contact information.
- ● Address

- Address 2
- City, State
- Zip/Postal code
- Country: DO NOT USE
- Phone
- Email
- Contact note

Alternate Contact: use these fields to provide information about an Alternate Contact for the patron.
- Surname
- First name
- Address
- Address 2
- City, State
- Zip/Postal code
- Country: DO NOT USE
- Phone

Library set-up
- Registration date: date patron was registered – automatically populated when you create a record.
- Expiry Date: automatically populated when the patron record is saved based on the Patron Category selected. Can be modified.
- Discovery Layer Note: free-text note field that is displayed in the patron's Dashboard in the Discovery Layer and in the patron's Details screen in the Staff View.
- Circulation Note: free-text note field that is wholly displayed in the patron's Check Out screen and partially displayed in the patron's Details screen in the staff view.

DL (Discovery Layer) login
- DL login [*Required field*]: ALWAYS enter the patron's barcode number here. If you do not enter the barcode number here, the patron's FIRSTNAME.LASTNAME will be auto filled.
- Password [*Required field*]: MUST be a numeric password, between 4 and 16 digits in length. These parameters are required in order to work with the Talking Tech (telephone messaging) software and other third-party vendors.

Patron Messaging Preferences – See Part F

Patron Account Flags – These do not appear in the patron record until after the new record is Saved. If you make changes to these settings, always click "Save" after making the changes.
- *Debarred* – check the Yes radio button to completely block the patron from checking out materials and placing holds until they resolve the issue that caused them to be Debarred. The message "Patron is debarred" displays as a Block on the patron's Check Out screen. Use the Restriction Reason Message to define the restriction reason for other library staff. Click the "Lift restriction" link on the Check Out screen or select the "No" radio button in the Details screen (and Save) to turn it off.
- *Exclude from Collection* – check the "Yes" radio button to prevent this patron record from being

submitted to the UMS Collection agency. Click the "No" radio button (and Save) to turn it off.

● *Gone no Address* – Check the "Yes" radio button to have the message "Patron address is in doubt" display as an Alert on the patron's Check Out screen. You must manually click the "No" radio button and save the change to turn it off.

● *Lost Card* – check the "Yes'' radio button to indicate that this cardumber has been reported as Lost. Patron Block will display on the patron's check out screen stating "Patron's card is marked Lost". If and when this cardnumber is found or replaced, you MUST manually check the "No" radio button.

F.   PATRON MESSAGING PREFERENCES

ONLY select notices listed in the Circulation/Borrowing section. The notices in the other sections have not been tested. We do not have a way to hide these settings.

Precise information about how Messages/Notices are generated and delivered is explained in more detail in Section XIII Notices, Messaging preferences and Messaging Queue.

In order to enable a previously unselected notice option, *you must click the checkbox in the "Override role prefs" column* and then select the delivery method, Email, TTtext or TTvoice. See below for specific options.

What notices we (can) provide and the delivery method(s):

● *Advance Notice*: Email only. If checked, an automatic email notice will be generated by the system reminding the patron about items due; generated **two** days prior to the due date. **DO NOT USE** if the patron has selected the (1 day) Item DUE notice option.
  ○ Digest: **ALWAYS** choose this option, *in addition to the notice type*, to have more than one notification appear in each email.

● *Hold Canceled*: Email or print only. If checked, notice that a hold for the patron was canceled will be generated.

● *Hold Filled*: Print is the default. If checked, email, phone, and text (Email, TTvoice, TTtext) notice(s) will be generated informing the patron that a hold or holds are available for pickup. Notice is generated when the item/items are checked in at the pickup location.
  ○ Digest: **ONLY select for Email notices**. Phone and text notices are "digested" after being sent to the Talking Tech server.

● *Item Check-in*: TYPICALLY A STAFF NOTICE; uses default formatting. Email only. If checked, a patron can receive email notification of the check in of their returned items.

● *Item Checkout*: TYPICALLY A STAFF NOTICE; uses default formatting. Email only. If checked, patron will receive email notification of items checked out to their record.

● *Item DUE*: Email only. If checked an automatic email notice is generated and sent **one day** prior to the due date reminding the patron about items due. **DO NOT USE** if patron has selected the (2 day) Advance Notice option. This notice does not include title information.

● *Item Lost*: Email only. If checked, patron will receive an email message.

● *Item Overdue* – Email or print only. Not an option for phone or text.

● Item Recall Notice – WE DO NOT USE

● Outstanding Fines – Not enabled for use. This is separate from the script that runs our Billing notices.

After making all the additions and changes to this record, Make Sure You scroll down to the bottom of the screen **and click the Save button**.

G. COPYING A PATRON RECORD

- Copy patron record
  - Start from either a Patron Checkout or Details screen.
  - On the work tool bar, click on the New button and select the "Copy patron" option.
  - The system provides a template based on the record you are copying (Adult to Adult, Adult Staff to Adult Staff, etc.).
  - Fill in the form for the patron. Notice that some fields are pre-populated with information.
  - When done, scroll down to the bottom of the screen and click the Save button.

H. ADDING A CHILD TO A PATRON RECORD

- Add Child
  - Start from either a Patron Checkout or Details screen.
  - On the work tool bar, click on the New button and select the "Child account" option. **7.02 KNOWN PROBLEM**: The system is not defaulting to a juvenile template from this button. You will need to make certain you select a Juvenile Patron Category until this is fixed.
  - Fill in the form for the patron. Notice that some fields are pre-populated with information.
  - When done, scroll down to the bottom of the screen and click the Save button.
  - Notice that the Guarantee (child) has a digital connection to the Guarantor (guardian) listed. You can access the other record by clicking on the link.

I. ADDING A GUARANTOR TO A JUVENILE RECORD

- Attach a Guarantor (this action will also start a Patron Group in the Guarantor's record. See Part R in this Section for more details and instructions.)
  - Setting up a Guarantor/Guarantee relationship for two existing records can ONLY BE SET from the JUVENILE RECORD, unless you use the Patron Group functionality mentioned above.
  - If you need to attach an already existing Adult record to an already existing Juvenile record as a Guarantor (or Guardian), follow these steps:
    - Pull up the Juvenile record.
    - Click the main Edit button
    - In the Guarantor Information section enter the Surname and First name of the existing patron record that you want to make the Guarantor/Guardian of this juvenile record and click the "Set to Patron" button.
    - You will get a pop-up window labeled "Search for Guarantor". Enter the surname, first name again in the pop-up box and click Search. If more than one result is extracted choose the correct record.
    - Click the Select button to choose the record.
    - The Adult name and borrower number (with hyperlink) will display in the Juvenile record. "Guardian" is the only option available in the Relationship field.
    - **CLICK THE SAVE BUTTON AT THE BOTTOM OF THE RECORD**. This change will not be saved otherwise.

- ▪ The Juvenile name (with hyperlink) will display in the Adult's record in the "Guarantees" field and in the Patron Group of the Adult's record.
- ▪ The Patron Group link in the Juvenile's record will state that the "Patron is a dependent of patron account [Guarantor]".

J.   EDITING A PATRON RECORD

Patron Records can be edited from the patron's Check Out or Details screens. Knowledge of basic registration procedures is required.

1. Access the patron record to be edited
2. Either click on the Edit button in the work tool bar or click the edit button below each section of the patron record (the latter can only be done in the Details screen).
3. Enter the changes directly into the fields to be edited.
4. When the changes are complete, scroll down to the bottom of the screen and click the Save button.

K.   RENEWING AN EXPIRED OR SOON TO BE EXPIRED PATRON RECORD

If the patron's record has already expired, this block will display on their Check Out screen:

Patron is blocked.

Please resolve the following conditions:

⊘ Patron's card expired on 05/27/2019.

⟩ Renew or Edit Details

- ● Review the patron record.
- ● To renew this record without modifying the patron record, click the Renew link.
- ● If modifying the patron record, click the Edit Details link and update information before renewing the record. **You can manually change the expiration date if you are editing the patron record, or save the record and click the Renew link from the Check Out screen.**
- ● To allow a one-time checkout based on your library policy, click the Edit Details link and change the Expiration date in the patron record to tomorrow. Scroll down to the bottom of the screen and click the Save button.

If a patron's record has not yet expired but is within 30 days of expiring, you will see this Alert on the Check Out screen.

Patron alert:

⚠ The patron's card expires on 04/30/2020

⟩ Renew or Edit Details

⚠ The patron has outstanding fines of 0.50

⟩ Make a payment

Follow the same procedures listed above to renew this record.

NOTE: As of January 2017, SCLS is using MailChimp to send email notification (only) to patrons with a record Expiry Date of the next month (e.g., March email to patrons with April expiration dates).

L.   REPLACING A PATRON BARCODE

A new barcode can only be assigned in the patron's Detail screen. Assign a new barcode when the existing active barcode has been reported lost or a patron's card is damaged beyond use. Bibliovation only allows one (1) active barcode/card number per patron record.

1. Call up the patron's Details screen.
2. Click the edit button under the Library management section.
3. Enter or scan the new barcode number into the Card number field.
4. Then scroll down to the DL login field and scan the new barcode number into that field as well.
   a. **NOTE**: If the patron has a custom DL login (something other than their barcode), then *do not* enter the new barcode in this field. The patron will be able to use either their custom login OR their new barcode to log in.
5. Scroll down to the bottom of the screen and click the Save button.
6. The system will automatically move the "lost" or old card number into the Previous Card numbers section of the Patron Record.

If the patron recovers the old card and prefers it over the new number, follow these steps:
   a. Highlight the card number they want in the Previous Card numbers section.
   b. Click the Restore button,
   c. The system will automatically Restore the old number and place the "newer" number into the Previous Card number section.
      i. **PROBLEM**: if staff repeatedly Restore a specific or "favorite" cardnumber for a patron, the system will retain every restoration in the Previous Cardnumbers field. A cardnumber that has been restored multiple times will produce multiple results in the Patron Search results screen. Search for patron 99999999999999 in the Sandbox to see an example.
   d. If you Restore the old barcode, you must also change the DL login back to the Restored card number.

Bibliovation retains *all* card numbers moved into the Previous Card number section and provides the date that the number was moved there.

What else needs to be done after changing a patron's barcode?
When you have to change a patron's barcode (Card number field), here's a list of other tasks you may have to do if the patron uses the following library resources:

LINKcat
- Enter the new patron barcode in the patrons' DL login field.
   - **NOTE**: If the patron has a custom DL login (something other than their barcode), then *do not* enter the new barcode in this field. The patron will be able to use either their custom login OR their new barcode to log in.
- Access: patron will be able use the new barcode to log into LINKcat immediately.

Digital Library

● If the patron uses the digital library, the previous barcode and new barcode will need to be merged on Overdrive Marketplace. (Current as of 01/30/2023).

M.   OTHER PATRON RECORD INFORMATION

Patron account numbers: Each patron has multiple numbers associated with their patron record:
- *Borrower number*. These numbers are automatically assigned by the Bibliovation system. When a new patron record is created, the Bibliovation system assigns an identification number, which then becomes the "key" to that record.
- *Card number*. Otherwise known as patron barcodes, these numbers are entered into the record by staff when a patron record is created or to replace a lost card number. Barcodes can be manually entered or scanned.
  - Warning: Found With Previous Cardnumber – if a previous card that was replaced is scanned or entered by staff at Check Out, staff will get an error message that says "No match found. Search Patrons." Click on Search Patrons. The system will produce this search result with this warning message in the Card column:

Results 1 to 1 of 1 found for '29078006068582'								
Add Selected Borrowers To Cart								
☐ Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
☐ 29078008083282 Warning: Found With Previous Cardnumber	DYNIX, DANGER T CELL #43 Arkham Asylum GOTHAM CITY 00000	Limited Use (A)	SGR	12/01/2020	0/0	0.00		Add to Cart

      This is the **ONLY** warning staff will get that the barcode scanned is not the patron's current, active barcode. If you allow check out, <u>the items will be checked out under the patron's active barcode.</u> Staff at libraries should follow their local library procedure for dealing with situations when patrons present a replaced/lost cardnumber.

  - [Repeatedly] Restored cardnumber - If library staff repeatedly Restore the same cardnumbers for a patron, a display issue will occur when that cardnumber is scanned. Look at Previous Cardnumbers for Homer J Simpson in the Bibliovation Sandbox for an example (enter 29078020135813 in a "Patron Search" search box and view the results).

- *DL login.* DL login should also be the patron's barcode. When a "lost" barcode is replaced, you will also have to change the DL login. Only staff can modify the DL login field.

- *DL Password*. Staff will enter a password/PIN at the point of patron registration. Patrons may change their own password/PIN by logging into their account in the Discovery Layer. Passwords (PINs) are required for all patron records; it provides greater security for the patron in the event of a lost card. The password/PIN is required for accessing the patron's account in the Discovery Layer, using MyPC and when calling into Harriet, (Talking Tech / telephone notification system).
  - Not all LINKcat libraries require patrons to use their password/PIN when checking out on Self Check units. In order to Call In to Harriet (Talking Tech / telephone notification system), the patron's password/PIN *must* be numeric characters only and must be between 4 and 16 digits in length.

N.   BORROWER CART

This option on the main Patron screen allows staff to change the same patron variables for a group of patrons at one time. You can select family members and change the address information for all records at one time. It is very important to pay close attention to what you are doing to prevent mistakes. DO NOT use this feature unless you have practiced in the Sandbox and you are confident that you know exactly what you are doing. As of 7.02, staff will no longer see the "Batch Delete Borrowers" button in the Borrowers Cart.

For example, in the Sandbox, at the main Patron screen, search for patrons with the last name "Dynix". You will see these search results:

Results 1 to 9 of 9 found for 'dynix'

Add Selected Borrowers To Cart

	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
☐	29078008083282	DYNIX, DANGER T CELL #43 Arkham Asylum GOTHAM CITY 00000	Limited Use (A)	MAD	07/01/2021	0/3	0.00		Add to Cart
☐	29078008999982	DYNIX, DARLENE 789 SECOND ST #5 TEST PATRON MADISON 00000	Adult (A)	MOO	11/08/2022	0/0	60.22	Testing the fix to the Borrower Cart scroll bar.	Add to Cart
☐	29078007455580	DYNIX, DEBBIE 505 N ROSA RD TEST PATRON MADISON WI 53705	Juvenile (C)	SGR	12/01/2024	0/0	102.00		Add to Cart
☐	29078007446951	DYNIX, DEMO PRESSREADER TEST PATRON 505 N ROSA RD MADISON WI 53705	Adult (A)	MCF	04/01/2021	0/0	0.00		Add to Cart
☐	29078007455648	DYNIX, DIABLO TEST PATRON TEST PATRON BARABOO WI 53559	Adult (A)	BER	04/15/2020	0/0	84.95	NCOA undeliverable 11/2017. Remove this note when address has been updated.	Add to Cart
☐	29078008083670	DYNIX, DING 400 DYNIX DRIVE TEST PATRON BLACK EARTH WI 53515	Adult (A)	SEQ	11/30/2020	0/0	-17.99	Testing the fix to the Borrower Cart scroll bar.	Add to Cart
☐	26657000588803	DYNIX, DOWN 201 W MIFFLIN ST ATTN: MAD/MNS MADISON WI 00003	Adult (A)	BER	12/31/2999	0/0	0.00	29078005230076	Add to Cart
☐	29078007713343	DYNIX, HELEN L. 1318 ROSEDALE AVE MADISON WI 53714	Adult (A)	WID	11/02/2020	0/0	19.24		Add to Cart
☐	29078006067618	DYNIX, RITA BOOK 1000 NICHOLS RD MONONA WI 53716	Adult (A)	WID	01/31/2024	0/4	0.00		Add to Cart

- Click on the box in the first column to select the patrons you want to change or click the top left box to select all of the records in the search results.
- Click the button "Add to Borrower Cart." The cart will now have a number next to it, the number of patron records you selected to go into the cart.
- Click on the link to the cart – "Borrower Cart #." You will be provided with a screen of fields that you can modify and will be applied to all of the patrons/borrowers in the cart.
- Click the "Batch Edit Borrowers" button.
- You will get a pop-up asking you to confirm that you wish to make changes to all of these records in the Borrower Cart.
- Make the changes and **click the Save button at the bottom of the screen**.
- The next screen is a report of the patrons you successfully batch edited along with a pop-up asking if you wish to clear the Borrowers Basket at this time. It is recommended that you clear the basket after every group of batch changes.

- REMEMBER: Be responsible; any changes you make to a patron record are recorded, by login, in the patron edit history table.

O. CHANGING PASSWORDS FOR STAFF LOGIN ACCOUNTS

It is recommended that the passwords library staff use in their login accounts be changed on a regular basis or as needed after a staff member leaves employment at your library. Each library has at least two "staff" logins; the staffLIB and adminLIB logins. The admin login is the only login with permission to change staff passwords. Follow these steps to change the password for your staff login account(s).

1. Log into a session using your library's Staff Admin account.**
2. Access the Staff patron record.
3. Click on the Edit button for the Library Use section.
4. Change the Password.
5. Click the Save button at the bottom of the screen.

** Each library Director was given the login and password for the Staff Admin account for their library. If your library Director, or assigned staff, cannot remember the login and password for your Staff Admin login, please call the SCLS Help Desk. We will update and share information over the phone or via paper document in Delivery. We will not send updated login/password information via email.

P. RELATED POLICIES
- Patron records – active barcodes, number of records

- Patron Categories – standardized parameters

- Adult Staff privileges and use of Internal patron category

- Patron data retention

Q. PATRON DATABASE CLEANUP PROCEDURES
1. Changing a patron record from a Juvenile to an Adult patron category
This is a per library policy. Some libraries change their Juvenile records at age 16, some only after the patron's 18th birthday. Here are the instructions for converting Juvenile patron records (JU, LUJ) to Adult (AD, LU) categories.
1. Set-up your data search parameters.
   - Advanced Patron Search – click on the Advanced Search Options hyperlink.
   - Patron Identity section / Patron branch = your library.
   - Patron Identity section / Category = Juvenile.
   - Date of birth section / Before date = 18 years before your set date. For example, if you want to convert all the Juvenile patrons that turned 18 on or before January 1, 2023, then subtract 18 from 2023 and enter the date in this field.
2. Scroll down to the bottom of the screen and click Search Patrons.

3. The system will extract a list of patrons that fit the criteria you entered. We do not have an export option from this page.
4. Review the records. Consider these issues:
   - If the juvenile record owes money; changing them to an Adult record may send the record to collections if your library is contracted with a collection agency. Libraries may decide not to convert a juvenile record with charges in order to prevent the account from being sent to collections and work with the patron to get the account cleaned up prior to changing the patron category.
   - Libraries may also decide to waive overdue charges incurred while the patron was a juvenile; especially if the library suspects that the fines were incurred by other family members. If the patron has Lost charges for items owned by another library, you must get permission from the library that owned the item and request that they waive those charges.
   - **If the juvenile record is connected to a Guarantor (guardian), the link between the two records MUST be deleted, from the Juvenile record, or removed from the Leader's Patron Group, BEFORE you change the category to Adult**.
5. Records can be changed individually or can be batch changed by using the Borrower Cart feature. Read the directions thoroughly and *practice in the Sandbox* before using the Borrower cart feature in the Bibliovation Staff Client/Production database.

Repeat these steps to change LUJ (Limited Use-Juvenile) records to LU (Limited Use) or AD (Adult) records.

2. Patron Merge - Cleaning up duplicate patron records
This functionality is limited to the "LIB" Admin login. Go to Circulation Manual Section 16 Circulation Tools for explanation and instructions.

3. Annual Purge of Inactive Patrons
In December of each year, Inactive patron records will be purged from the system based on the following criteria:
- Patron record has had no issues (checkouts) for 2 years;
- Patron record has been expired for 1 year; and
- Patron has a balance of 20.00 or less.

SCLS staff will run a report of patron records, by Home library, which fit these criteria and will send the report(s) out to the libraries for review. After the review period, SCLS staff will re-run the report to remove any* updated records and will purge the remaining records from the shared patron database.

*If, during the review period, you see patron records on this report that you do not want purged, simply renew the record. You can choose to add a note to the record indicating that the record had been renewed without photo ID.

4.   Annual Waive of "old" charges.

In November of each year, SCLS staff will run a report of all patron records that have the following:

- o   charges with a datestamp of 10 years old or older AND
- o   the *total old charges* for the patron are less than $100.00.

The patron number and charges extracted will be submitted to LibLime with a request to "batch waive" all charges that fit the above parameters.

R.   PATRON GROUP

Patron Group is an enhancement of the existing Guarantor/Guarantee functionality. Patron Group allows staff to connect patron records under a Leader of the Group. Staff will be able to check the Group and provide the Leader with the following information for all of the patrons in the group:

- ●   Total number of holds (active and inactive total)
- ●   Total number of Issues (checkouts)
- ●   Total number of items overdue
- ●   Total balance of fines (charges) owed

This is a useful tool for parents/guardians who want to know to know a summary of what their dependents have checked out and overdue.

We are currently blocking the display of the Patron Group information in the Discovery Layer to prevent confusion as this is a separate functionality from the LINKcat Mobile app Linked Accounts.

Staff create a Patron Group by accessing the link in the left sidebar menu on a patron record. For the record designated as the Leader, this will show any existing linked records, and provides options to link to additional existing records or create new patron records linked to the account.

Please do not add Adult records as dependents (despite some of the screen shots). During testing, we have found that adding an Adult patron as a dependent to a Patron Group, who also is a Leader for another Patron Group, seems to cause problems. For regular family groups, only assign one Adult as a Leader and add only juveniles as dependents. If you are creating a Patron Group for an Adult Leader, with a dependent that is also an Adult (caretaker, homebound liaison, etc., *make certain* that the dependent does not also have dependents.

Start in the record of the patron who will be the Leader. This will be the patron who monitors and/or manages the other accounts.

Search for patrons with the Surname of "Expired" and a library of "BAR".

Four records were extracted but HAROLD EXPIRED will only be the Leader/Guarantor for the two juveniles.

In Harold's Details screen, you can see that Annie is already connected to his account as a Guarantee.

Click on the Patron Group link in the left sidebar.

Florence Expired already has a record in the database, so I can click the "Add Existing Patron" button to link to her record to Harold's.

Enter the barcode or the name of the patron to add. Make sure the record displaying is the correct record before selecting it.

Note that the Details tab for the leader record now shows both records linked under the Guarantees header.

If you try to add a person to the group, and that person is already a member of another group, you will get a screen warning:

If you click Yes, the person will be removed from the other group and added to this one.

Another option from the Patron Group tab is to add a new patron record. Click the Add New Patron button. This will open a screen for adding a new patron, with the guarantor link already established:

Select the Patron Category from the list and create the new patron record.

Fill in all necessary and required fields and save. The new patron record is created with a link to the Leader record and the leader's Patron Group screen now displays the new group member:

Add as many family members as needed to this leader/parent/head of household/guardian record. This record will show all members and their circulation status in the Leader's Patron Group screen; the dependent records will only show a link to the Leader record in their Details screen.

There are similar displays available to the patron under a Patron Group section of the Discovery Layer dashboard: WE NOT CURRENTLY DISPLAYING THE PATRON GROUP INFORMATION IN THE DISCOVERY LAYER IN CASE OF CONFUSION WITH THE LINKED RECORDS OPTION IN THE LINKCAT MOBILE APP.

A "dependent" patron can be removed from the group at any time, regardless of current circulation status. This does not delete the patron record; it just removes it from this group.

From the Leader's Patron Group screen, click the Remove button:

And click Yes in the pop-up to confirm

From the Guarantee's record, on the Patron Group tab, click the Remove button and confirm.
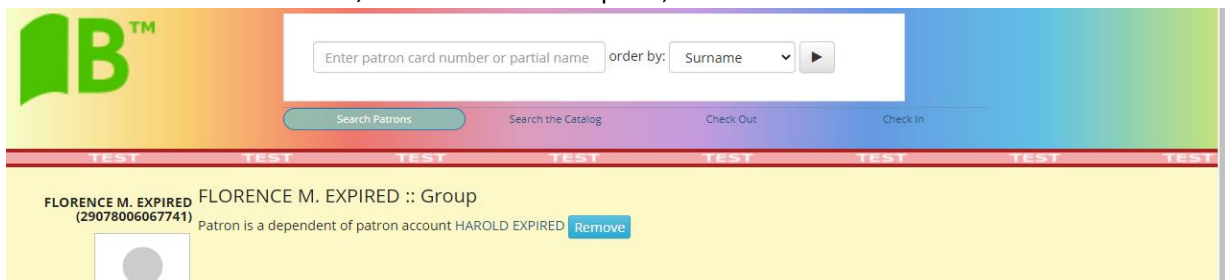
And click Yes in the pop-up to confirm.
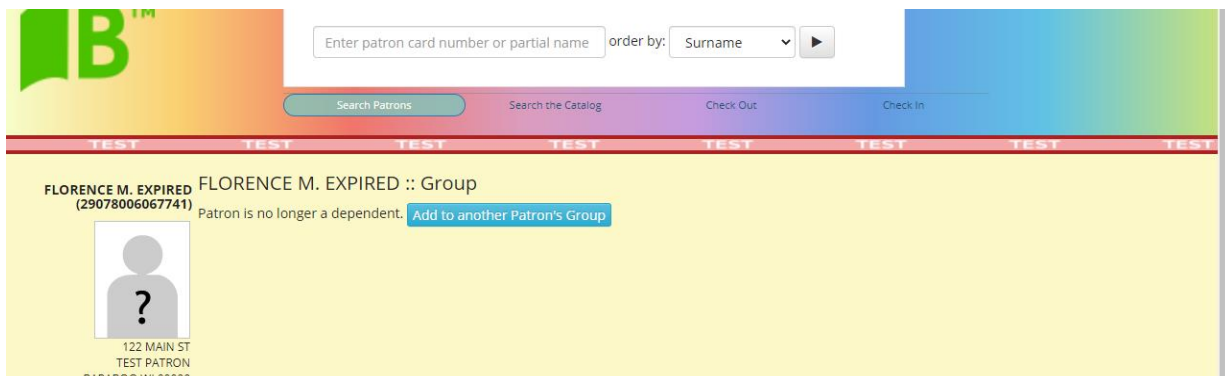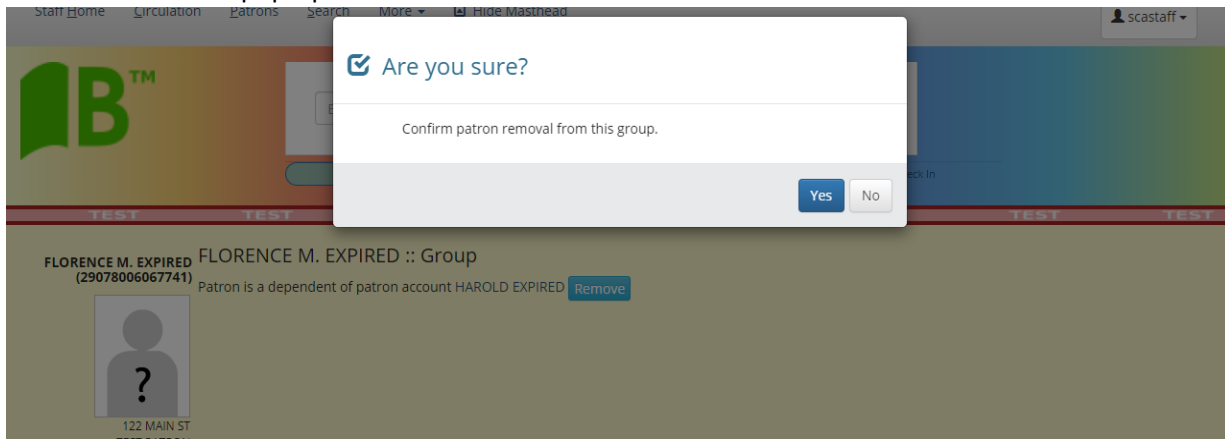
In that patron's record, you will see a button that provides the option to link this patron record to another family group. Click that button and enter another Leader name.
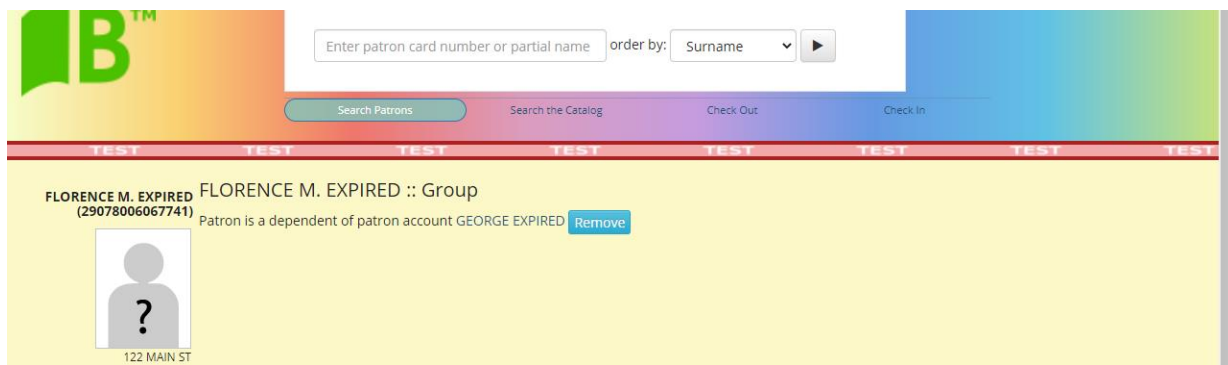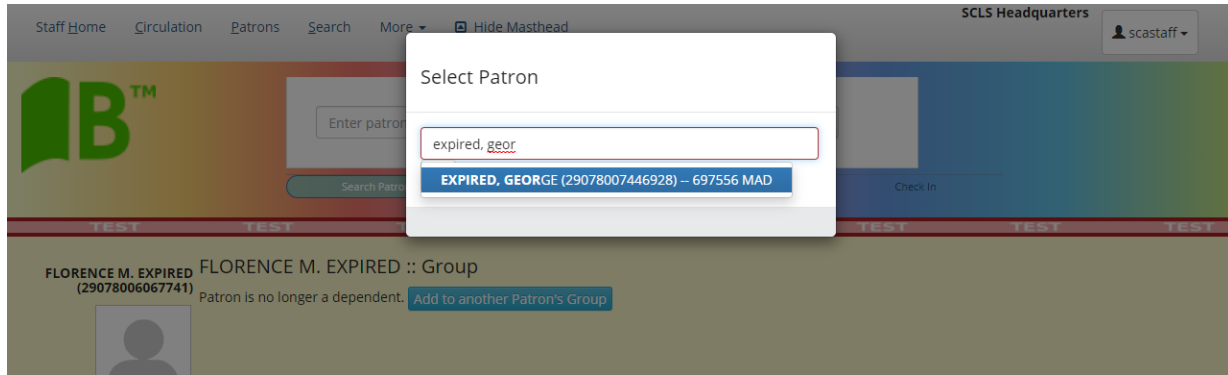
Then check the Leader's Patron Group screen to confirm the change.
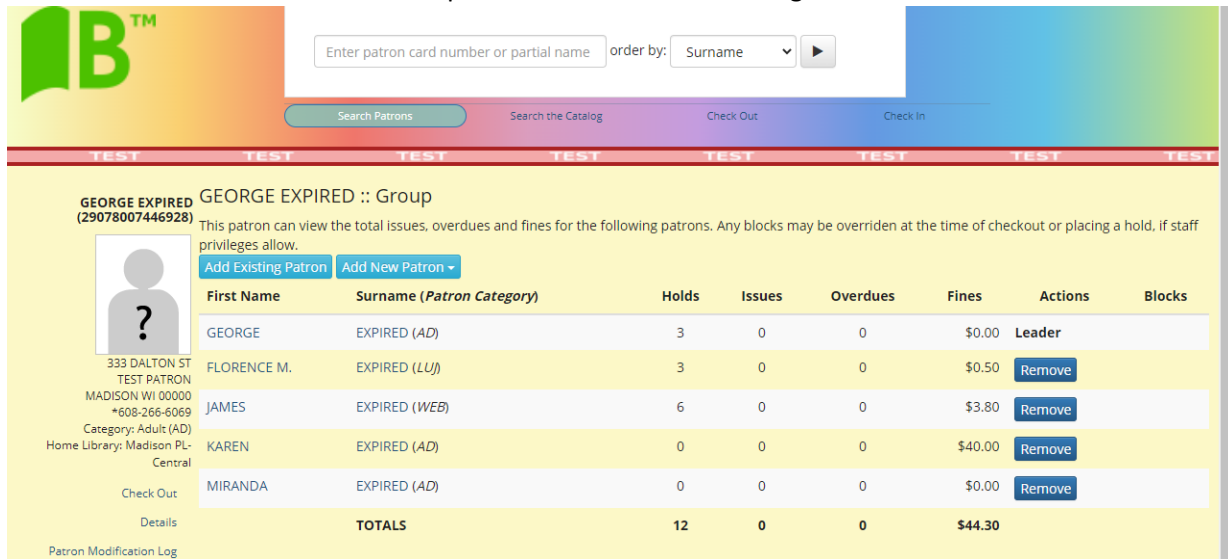
If a patron is a dependent member of a family group, **their record must be removed from the group before you can delete the record**. This can be done either from the Leader record, or from the dependent record.

If you want to delete the leader/parent record, **you must first remove, or relink to a new leader, all of the dependent records**.

S.   PATRON DELETE

See [Section XV! Circulation Tools](#) for information about deleting patron records.

T.   PROXY BORROWING (BORROWER RELATIONSHIPS)

Proxy Borrowing automates the current manual process of Holds Pickup Authorization.

When the permissions are enabled, staff will be able to connect patron records together, allowing proxy borrowing.

In a patron record, staff will see the "Proxy Borrowing" link in the left sidebar. See the Patron Note that indicates that Harold has Hold Pickup Authorization (HPA) to pickup holds for Annie Expired.

Once the Proxy Borrowing link is clicked, you will see this screen
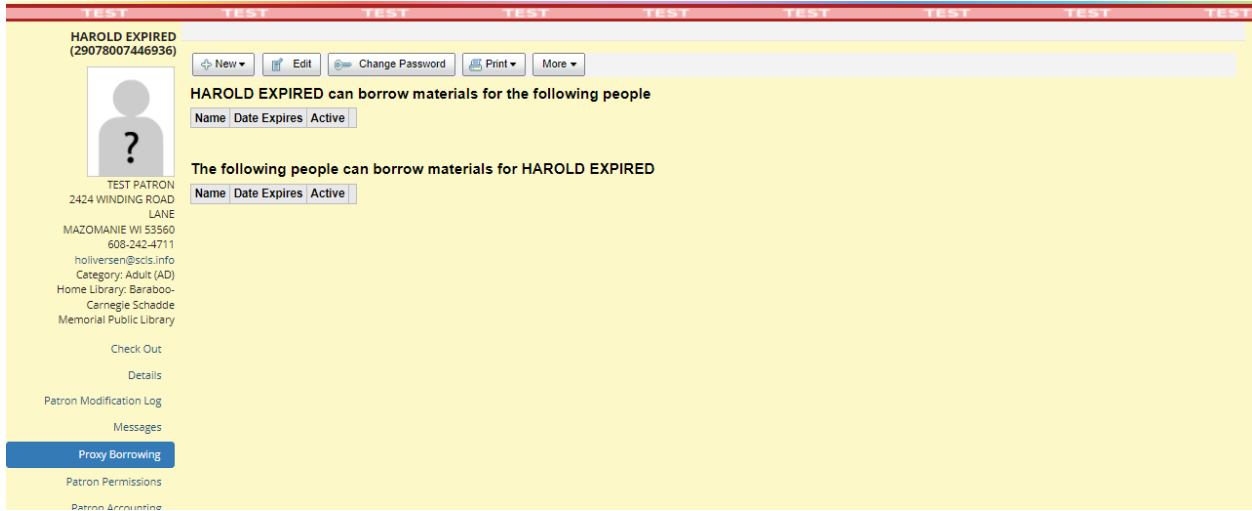
Click the "New" button and select Borrowing relationship. You will see this screen:
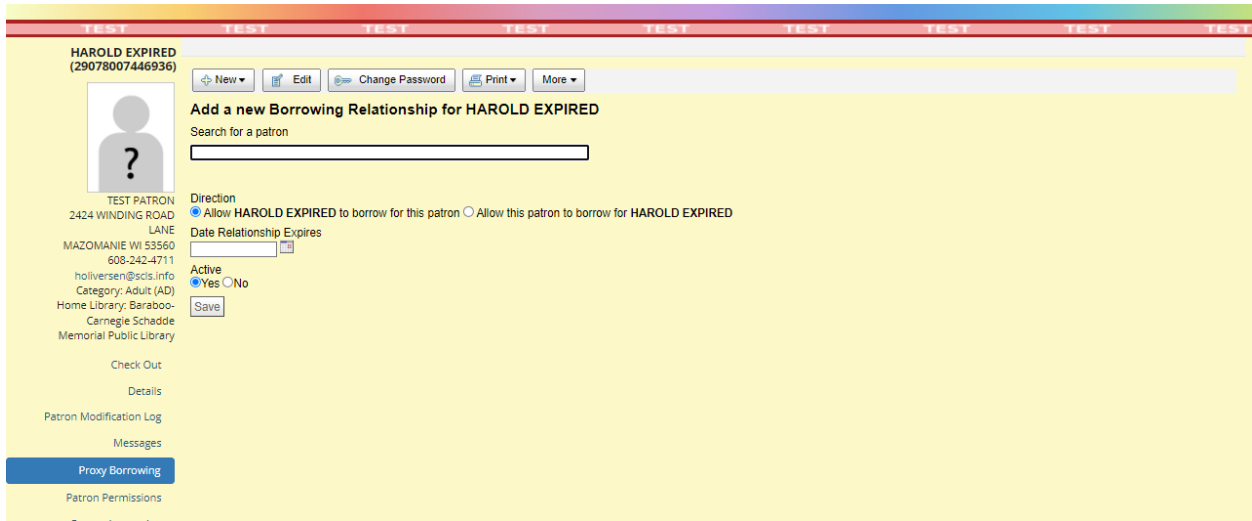
It is important to search for patrons by patron barcode or by name, in LASTNAME, FIRSTNAME order. Search for EXPIRED, ANNIE

Select the correct patron record.

"Direction" field:
- Confirm that the radio button "Allow HAROLD EXPIRED to borrow for this patron" is checked.

"Date Relationship expires" field
- This field defaults to "[no date]".

"Active" field
- This field defaults to "Active".

There are directions later in this document that describes how to set an expiration date or change a relationship to inactive once the relationship is established.

Click "Save" to save the relationship. Now you will see the relationship on the screen.

If the patrons have a reciprocal relationship, follow the same steps above but make this change in the "Direction" field:

- Confirm that the radio button "Allow this patron to borrow for HAROLD EXPIRED" is checked.
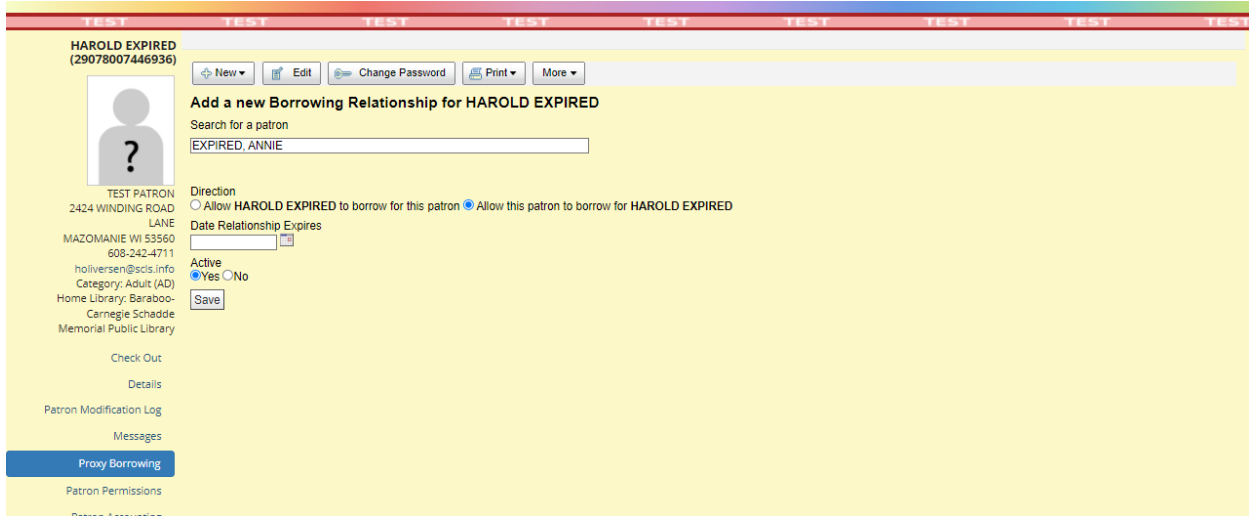
Save the relationship.

Now, in the screen, you will see that both relationships are displayed.
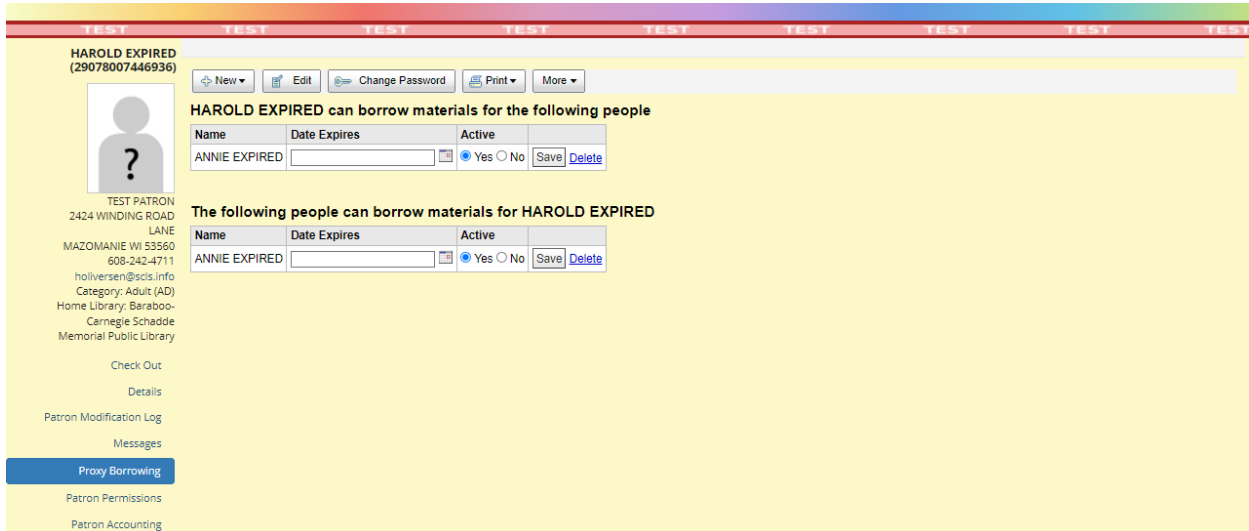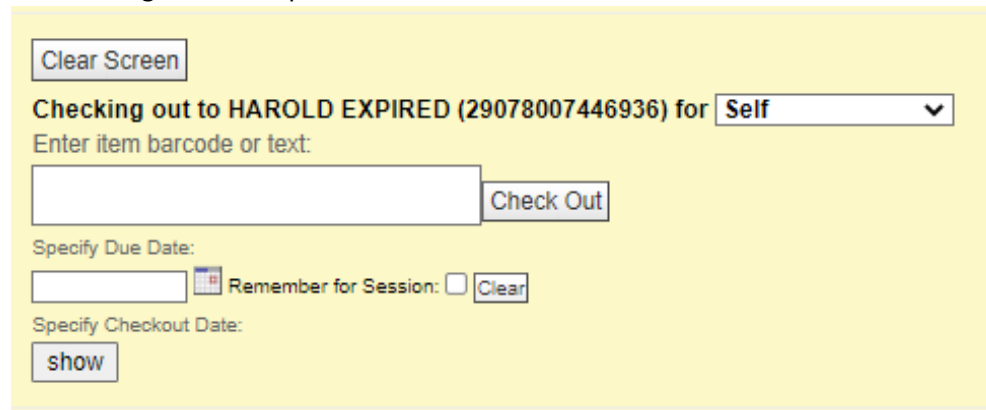
STEPS AT CHECKOUT

Annie has a hold waiting for her at BAR. Harold is in the library to browse items and is also picking up Annie's hold.

There are two ways to proceed but only one way clears Annie's hold request and marks it as issued.
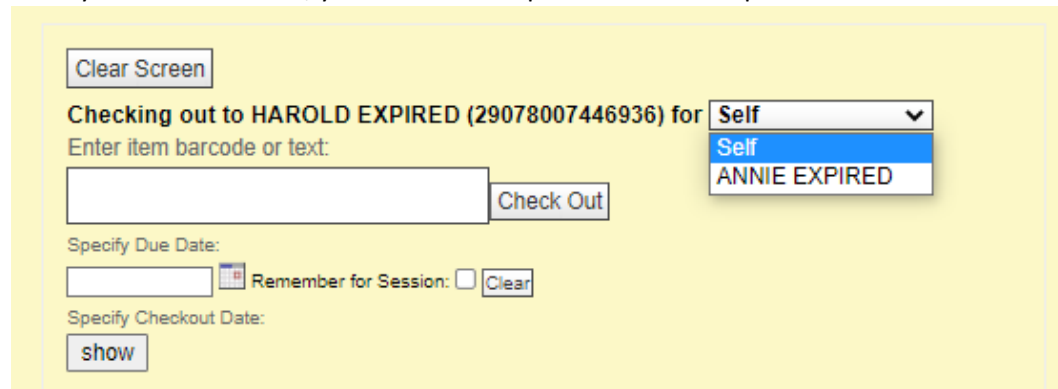
PREFERRED CHECKOUT STEPS

Access Harold's record. Below the "Clear Screen button you will see the phrase "Checking out to HAROLD EXPIRED (29078007446936) for [Self]. This pull-down menu option is a result of the addition of a borrowing relationship.

Once you click the arrow, you will see the optional relationship

For this example, we will have staff select ANNIE EXPIRED for the checkout (as the hold is on her record).

Check out the item on hold

This block will appear on the checkout screen

Click the Override block checkbox and then the Override blocks and checkout button.

You will see information on the checkout screen that the items was checked out to Annie Expired.

The item is not checked out to Harold's record, is listed as a checkout on Annie's records and recorded in her Holds History as "issued".

ANNIE EXPIRED
(29078007303608)

?

TEST PATRON
4610 S BILTMORE LN #101
MADISON WI 53718
608-242-4711
holiversen@scls.info
Category: Juvenile (JU)
Home Library: Baraboo-
Carnegie Schadde
Memorial Public Library

Check Out
Details
Patron Modification Log
Messages
Proxy Borrowing
Patron Permissions
Patron Accounting
Patron Preferences
Lost Items
History
Patron Delete

Edit | Change Password | Print ▾ | More ▾ | Mute Sounds

Patron alert:
⚠ The patron has 4 overdue items checked out.

Clear Screen

Checking out to ANNIE EXPIRED (29078007303608) for Self ▾
Enter item barcode or text:

[   ] Check Out

Specify Due Date:
[   ] 📅 Remember for Session: ☐ Clear
Specify Checkout Date:
show

Search to place hold for ANNIE EXPIRED (29078007303608) Search To Hold
Patron notes:
• 02/11/2022 SCA *"HPA for HAROLD EXPIRED."* Delete | Archive
Add A New Note

Checked Out (6) | Fines & Charges (0.00) | On Hold (2) | Circulation History

Checked Out

Date due	Title	Date checked out	Check out library	Item type	Call number	Renew select all | none
03/11/2022	Vitamin C : the real story : the remarkable and controversial healing factor / , by Hickey, Steve, 39078072375422	02/11/2022	SCA	BKA28	615.328 H526v	☐ (0 of max 2)
02/23/2022	Mobituaries : great lives worth reliving / , by Rocca, Mo 39078102417947	01/26/2022	SCA	BKA28	920.02 R581m	☐ (0 of max 2)
02/08/2022	Meet Godzilla / , by Greenberger, Robert. 39078058825259	01/11/2022	SCA	BKJ28	+791.43 GRE	Not Renewable On Hold
02/08/2022	Getting the most out of your table saw : a complete handbook describing the table saw in the home workshop with more than three hundred photographic illustrations and line drawings. 39078020258613	01/11/2022	SCA	BKA28	621.9 GET	☑ (0 of max 2)
02/08/2022	JV-Problem #01 39078035361352	01/11/2022	SCA	BKA28	MAD NF	Not Renewable On Hold
02/08/2022	JV-Problem #01 39078035361535	01/11/2022	SCA	BKA28	MAD NF	Not Renewable On Hold
						Renewal due date: [ ] 📅

Override Renewal Blocks: ☐ Renew checked items

ANNIE EXPIRED
(29078007303608)

?

TEST PATRON
4610 S BILTMORE LN #101
MADISON WI 53718
608-242-4711
holiversen@scls.info
Category: Juvenile (JU)
Home Library: Baraboo-
Carnegie Schadde
Memorial Public Library

Check Out
Details
Patron Modification Log
Messages
Proxy Borrowing
Patron Permissions
Patron Accounting
Patron Preferences
Lost Items
History

Edit | Change Password | Print ▾ | More ▾

Reading Record | Holds History | Patron Edit History | Archived Patron Notes

Holds History

Title	Author	Call no.	Item type	Barcode	Placed date	Status	Expired/canceled date
Vitamin C : the real story : the remarkable and controversial healing factor /	Hickey, Steve,	615.328 H526v	BKA28	39078072375422	2022-02-11	issued	2022-02-11
The mask and mirror [sound recording] /	McKennitt, Loreena,				2021-04-08	canceled	2022-01-28

ALTERNATE CHECKOUT STEPS

IF your library's policy is to check out the hold to the patron standing in front of you, instead of checking the item out to the patron that placed the hold, you will have to go to record of the patron that placed the hold and cancel that hold.

Malcolm Reynolds and Ivan Vorpatril have a proxy borrowing relationships and Malcolm is picking up a hold for Ivan at the REE library.

Access Malcolm's record and leave the Checkout option as Self

Check out Ivan's hold to Malcolm's record.

MALCOLM REYNOLDS (29078013982007)

TEST PATRON
4610 S BILTMORE LN #101
MADISON WI 53718
608-242-4711
holiversen@scls.info
Category: Adult (AD)
Home Library: SCLS
Headquarters

[New ▾] [Edit] [Change Password] [Print ▾] [More ▾] [Mute Sounds]

Search to place hold for MALCOLM REYNOLDS (29078013982007) [Search To Hold]

Patron notes:
› 04/29/2021 MTH *"Hold Pickup Authorization: Ivan Vorpatril is allowed to pick up holds for Malcolm. hjo/sca"* [Delete] [Archive]
› 04/29/2021 MTH *"Umbrella was left at the library. hjo/sca"*
[Add A New Note]

[Clear Screen]

Checking out to MALCOLM REYNOLDS (29078013982007) for [Self ▾]
Enter item barcode or text:

39078074547192 [Check Out]

Specify Due Date:
[_____] 🗓 Remember for Session: ☐ [Clear]
Specify Checkout Date:
[show]

Check Out

Details
Patron Modification Log
Messages
Proxy Borrowing
Patron Permissions
Patron Accounting
Patron Preferences
Lost Items
History
Patron Delete

Checked Out (1) | Fines & Charges (0.00) | On Hold (11) | Circulation History

Checked Out

Date due ▲	Title ◆	Date checked out ◆	Check out library ◆	Item type ◆	Call number ◆	Renew select all I none
03/11/2022	Swamp Thing, Healing the breach / , by Dysart, Josh. 39078053206521	02/11/2022	SCA	BKA28	741.5973 Sw23s v3	Not Renewable On Hold
						Renewal due date: [_____] 🗓

Override Renewal Blocks: ☐ [Renew checked items]

https://scls-sandbox.bibliovation.com/cgi-bin/koha/circ/circulation.pl?borrowernumber=920340#checkedout

Block message

Click override Block checkbox and click the Override blocks and checkout button.

Item is checked out to Malcolm's record

Ivan's hold request is not filled, the hold request is still on Ivan's On Hold list with a Barcode of "Item is waiting" and a "Reshelve after" date. (Columns related to hold expiration date were re-labeled "Reshelve after" in 7.02.)

Patron alert:
⚠ The patron has a credit of -39.99.

TEST PATRON
4610 S BILTMORE LN #101
MADISON WI 53718
608-242-4711
holiversen@scls.info
Category: Adult (AD)
Home Library: Reedsburg
Public Library

Check Out
Details
Patron Modification Log
Messages
Proxy Borrowing
Patron Permissions
Patron Accounting
Patron Preferences
Lost Items
History
Patron Delete

Clear Screen

Checking out to IVAN VORPATRIL (29078017854129) for Self ▾
Enter item barcode or text:

[   ] Check Out

Specify Due Date:
[   ] 🗓 Remember for Session: ☐ Clear
Specify Checkout Date:
show

Search to place hold for IVAN VORPATRIL (29078017854129) Search To Hold
Patron notes:
› 05/17/2021 SCA *"Patron allowed to pick up holds for Malcolm Reynolds."* Delete
Archive
Add A New Note

Checked Out (1)   Fines & Charges (0.00)   **On Hold (10)**   Circulation History

Patron current holds

Hold date	Title	Item Type	Call Number	Barcode	Pickup At	Notes	Priority	Wait Expires	Suspend (all: ☐)	Resume On	Delete?
02/08/2022	JV - Test Item 06.				Reedsburg Public Library		2		☐	[ ] 🗓	No ▾
02/04/2022	The future falls /, by Huff, Tanya				Reedsburg Public Library		1		☑	[ ] 🗓	No ▾
01/26/2022	Echo : an elephant to remember /				Reedsburg Public Library		1		☐	[ ] 🗓	No ▾
01/26/2022	Home alone 2 : lost in New York /				Reedsburg Public Library		2		☐	[ ] 🗓	No ▾
01/25/2022	100 easy checkmates /, by Evans, Larry,				Reedsburg Public Library		4		☐	[ ] 🗓	No ▾
04/14/2021	The midnight library [text (large print)] /, by Haig, Matt,				Reedsburg Public Library		68		☐	[ ] 🗓	No ▾
04/09/2021	Bird brains : the intelligence of crows, ravens, magpies, and jays /, by Savage, Candace,			Item is **waiting**	Reedsburg Public Library		1	02/03/2022			No ▾
12/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.				SCLS Headquarters		2		☐	[ ] 🗓	No ▾
12/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.				SCLS Headquarters		3		☐	[ ] 🗓	No ▾
12/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.				SCLS Headquarters		4		☐	[ ] 🗓	No ▾

Save Changes

Item is not registered in Ivan's Holds History as "issued".

Detail
MARC
ISBD
Edit Items
Item Statuses
Holds
Checkout History
Modification Log

Place a hold on Bird brains : the intelligence of crows, ravens, magpies, and jays /

Select patron for new hold

Refresh view

Existing holds
[   ] Search Clear

Priority ▾	Patron	Notes	Date	Pick up Library	Details	Suspended	Waiting/Resume
1 ▾	IVAN VORPATRIL	[ ]	2021-04-09 11:23:24	Item being transferred to Reedsburg Public Library No Barcode			Waiting since 01/26/2022

Update

You will have to cancel Ivan's hold on the item that Malcolm checked out for him.

		Checked Out (1)	Fines & Charges (0.00)	On Hold (10)	Circulation History						

Patron current holds

Hold date	Title	Item Type	Call Number	Barcode	Pickup At	Notes	Priority	Wait Expires	Suspend (all: ☐)	Resume On	Delete?
02/08/2022	JV - Test Item 06.				Reedsburg Public Library		2		☐	▦	No ∨
02/04/2022	The future falls /, by Huff, Tanya				Reedsburg Public Library		1		☑	▦	No ∨
01/26/2022	Echo : an elephant to remember /				Reedsburg Public Library		1		☐	▦	No ∨
01/26/2022	Home alone 2 : lost in New York /				Reedsburg Public Library		2		☐	▦	No ∨
01/25/2022	100 easy checkmates /, by Evans, Larry,				Reedsburg Public Library		4		☐	▦	No ∨
04/14/2021	The midnight library [text (large print)] /, by Haig, Matt,				Reedsburg Public Library		68		☐	▦	No ∨
04/09/2021	Bird brains : the intelligence of crows, ravens, magpies, and jays /, by Savage, Candace,			Item is *waiting*	Reedsburg Public Library		1	02/03/2022			Yes ∨
12/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.				SCLS Headquarters		2		☐	▦	No ∨
12/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.				SCLS Headquarters		3		☐	▦	No ∨
12/04/2015	Captain Vorpatril's alliance /, by Bujold, Lois McMaster.				SCLS Headquarters		4		☐	▦	No ∨

Save Changes

Detail
MARC
ISBD
Edit Items
Item Statuses
Holds
Checkout History
Modification Log

Place a hold on Bird brains : the intelligence of crows, ravens, magpies, and jays /

Select patron for new hold

Refresh view

MODIFYING THE PROXY BORROWING RELATIONSHIP

A proxy borrowing relationship can be modified at any point to
- Add, change or remove an expiration date; using the Calendar widget is the most efficient way to change this field.
- Make the relationship inactive or active by clicking the radio buttons.
- Delete the relationship by clicking the Delete link.