

C. SCLS GUIDELINES FOR REGISTERING PATRONS

SCLS has developed guidelines for patron registration procedures, to ensure consistency within the System, ~~within for both~~ LINKcat libraries and ~~within~~ non-LINKcat libraries. These guidelines will assist libraries in ~~dealing with~~ registration of patrons ~~other than those who reside within who reside outside~~ 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 SCLS 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 **as long as they reside in a WI library system that has reciprocal borrowing privileges. [This includes all library systems in Wisconsin other than Milwaukee County.]**
- 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~~):

- **The minimum age for an adult card is 16 years but may be higher based on local library policy.**

~~If the patron wants to check out materials at the time of registration, a photo ID and proof of address must be furnished.~~

- **If the patron has a photo ID and proof of acceptable address, an adult card is issued and can be used immediately.**

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.

If the patron does not have proof of address, local library policy may allow:

- a patron to check out library materials
- a library card to be mailed to the address given by the patron as verification of the address
- a library to issue a Limited Use card

Commented [EG1]: Here and elsewhere, we'll need to fix the formatting once we get the words we want.

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: (See Circ Manual chart.)

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)

It is recommended that a 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. It is also recommended that a 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, it is recommended that 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 should 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.~~

If a patron reports a lost card, staff should immediately mark the card "Lost" in the patron database. A replacement card may be issued and a replacement cost charged based on local library policy. It is not necessary to fill out a new registration form and send it to the library of residence unless the patron reports an address change or name change as recommended above.