

GUIDELINES FOR COLLECTING PATRON INFORMATION

The purpose of these guidelines is to help library staff maintain the shared patron database in an accurate, up-to-date condition, with uniform entry of information. Patron registration and use of the NCLS universal card works best if everyone follows these guidelines. The guidelines were established by the NCLS member libraries that use the SIRSI circulation system.

1. Search the database.
When issuing a new card, or updating information to re-register a patron, please search the NCLS patron database to see if the person's information is already there.
2. Registration Card.
If you are using the NCLS Registration Card, all lines are required.
Please be careful to write the information legibly (please print) because many of these cards will have to read by someone in the NCLS Technical Services Department. (Non-SIRSI libraries)
3. Ask for two forms of identification, one of which should be a picture ID.

▪ Drivers License	▪ Checkbook
▪ County issued "Non-drivers" ID	▪ Utility bill
▪ School ID	
4. Name: Please use the full legal name. No nick-names or abbreviations.
Ask for a middle initial or name. If the name is a common one, please be sure to ask for the full middle name.
5. Address: If a patron gives only a Rural Route (RR) or PO Box address, ask for a street address or 911 address. The United States Postal Service is changing their system from these "RR – Rural Route" designations to street/road addresses.
Verify that the address is a current local address.
6. Children: Please ask parents/guardians for their ID to verify address.
NCLS recommends that libraries require the signature of a parent or legal guardian for applicants up to and including age 12, at a minimum, on the registration form.
7. Usercat1: What? This is a name of a field in the patron record on the SIRSI system.
We decided to leave this goofy name because no matter what we named it, it would have to be explained. So here goes: This is the name of the municipality in which the patron resides and the one that you may want to use for statistics.

For example: A patron lives in LaFargeville, which is in the Town of Orleans. Which to use? The library gets funding from the Town, so the patron "count" may be more significant for that municipality. Your library may also decide to use the village for people within the village and the Town for people outside the village but within the Town. Please contact your Consultant if you have questions about this line.
8. For Libraries that do not use the SIRSI Circulation system:
Please send the registration forms to NCLS.
Do not send all your current registration forms to us. Only send the new forms as you update or verify the patron information. The registration forms along with the Universal library card will be in the next delivery.
Please remember to tell NCLS when patron information has changes so we can update the database.

UNCLAIMED CARDS

(Libraries that **do not use** the SIRSI Circulation System)

1. Notify the customer when the card arrives.
2. If a card is unclaimed **after 6 months**, pull the registration card from your files and send it to NCLS along with the universal card.

ENTERING PATRON INFORMATION

(Libraries **using** the SIRSI Circulation System)

1. Use all capital letters for name and address information.
2. Do not use punctuation except for the following:
 - Commas separating last and first name
 - Hyphens in a surname
 - Dashes in zip codes and telephone numbers
3. Name Format: Last name, First name Middle initial or middle name.
Examples:
 - CASKEY, MARY LOU
 - CHOLTCO-DEVLIN, BEVERLY A
 - ROBERTS, ROBERTO J (TONY)
4. Input the mailing address on the Address 1 line.
5. Address 2 is used for a second address. (i.e. Snowbirds, summer people, college students, etc.)
6. Address 3: Use for Parent/Guardian information that differs from the patron (usually a minor) address in Address1. Be sure to use the "In Care of" option in Address 1 to reflect the parent or guardian's name.
7. The Line field: Use for any address information not included in the other fields.
8. Enter the birth year as yyyy. The birth year is located on the demographics tab.
Example: 1963. If patron refuses to give a year, type in a zero.

EXPIRED OR INACTIVE USERS

(Libraries **using** the SIRSI Circulation System)

The Inactive User report is based on the use of the customer's card:

- After 5 years of inactivity the user is purged from the database if there are no outstanding bills, checkouts or holds.
- A report is given to each library consisting of the users that were purged.
- Please pull your registration cards when the Patron Purge report is received.
- Delete users only if you can verify that they have passed away or moved out of the NCLS area.