

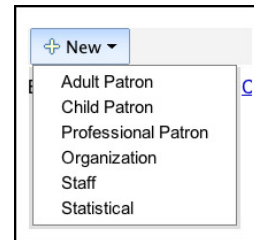
Issuing Library Cards instructions

Searching for Patrons

1. Check for an existing patron record.
 - a. Enter patron's name in the *Search Patron* box (found on the home page)
 - b. This will search the entire shared patron database
 - c. Verify an existing patron by asking for telephone number or address.
 - d. If patron is found in the database, explain that the patron does not need an additional card; also, ask if they want to change their home library to your library.
 - e. **Searching Note:** As of 9/1/10, if you try searching for a patron using their full name (ex, John Lee Allen, Adam Josh Smith, or Andrew Michael Smith), you get no results. If you search using only their first, first name (David Allen, Adam Smith, or Alan Smith), you get results. **All patrons that have two or more names in the first name box have to be found excluding the middle name. Patrons with two-part last names are also problematic.**

New Card Creation (Adult)

1. To Create a New Card, be sure you are using a secure (https) session of NExpress:
 - a. Click on the **New** button, located on the **Patron Search Results** screen, or from the home page, click on **Patrons** (at the top left or underneath **Circulation**),
 - b. Use the pull-down menu to **choose a type of card:**
 - Adult Patron
 - Child Patron – See the *New Card Creation (Child)* section for additional instructions.
 - Professional Patron (Library dependent)
 - Other card types may be issued by Director (Library dependent)
 - c. Fill in **Surname** (last) name
 - d. Fill in **First** and **Middle** name in the next field – separate with a space only
 - e. Skip the **middle initial** field; it is for migrated data only.
 - f. Use **Calendar for date of birth** (MM/DD/YYYY)
 - g. Indicate **Gender** of patron – if unsure leave blank, do not ask
 - h. Fill in patron's complete current **street number** and **name** in the **Address Field**
 - Use standard abbreviations (N, S, Ave, St, Blvd), and use digits for numbered streets – (1st, 2nd, 3rd).
 - i. Leave the **Address 2** field blank, unless you need it for apt or suite number, or PO Box.
 - j. Fill in **City** and **State**
 - k. Enter five digit **Zip code**. For nine digit Zip codes, use XXXXX-XXXX.



- l. Fill in **Contact Information**, including
 - Phone Numbers
 1. Use XXX-XXX-XXXX for **phone numbers**.
 2. The **Primary Phone** field is what shows up on transit slips; if a person's primary phone number is a cell phone, put it in the Primary Phone field.
 - Email Addresses
 1. The **Primary Email** field is what shows up on transit slips.
 2. **Remind patron:** The System uses the Email address provided for hold and overdue notifications.
 3. **Only** list email accounts that are checked regularly, *otherwise leave blank*.
- m. **Alternate address** can be used to indicate permanent address of patrons living at a temporary address; for example, students.
 - Student ID numbers can be entered in one of the **additional attributes** field at the bottom of the add patron screen.
- n. **Alternate contact** is generally only used with child patrons
 - See the *New Card Creation (Child)* section
- o. **LIBRARY MANAGEMENT**
 - **Scan card** number into box
 - For **Library:** verify or select YOUR library from the menu
 - For **Category:** select the appropriate type of card user for your library from the drop down menu
 - Skip **Sort 1** and **Sort 2**.
- p. **LIBRARY SET-UP**
 - Leave registration and expiration date blank. Computer will fill in date.
 - **OPAC note:** Messages patrons view when logged into their Account
 - **Circulation note:** A private note that may only be viewed by library personnel.
 - **Example:** Internet Permission note on Child Patron cards
- q. **OPAC LOGIN and PASSWORD**
 - **Scan the patron card** again in the **OPAC Login** box to set the OPAC login as the patron card number
 - Set a password in the password box, of the patron's choosing or an internal password scheme; Koha does not generate passwords.
 - Staff *cannot* view a patron's password (except when it is being entered). Staff *can* reset it for patrons.
 - Patrons will be able to update/change their password logging in via the OPAC.

r. **DISABLE BORROWER READING HISTORY**

- At card issue, patrons can choose whether or not their borrowing history is kept. Default setting is **No**.
 - **Yes** = Disable Reading History
 - **No** = Keep Reading History (default)

s. **ADDITIONAL ATTRIBUTES and IDENTIFIERS**

- Additional identifiers such as Driver's License numbers, Social Security numbers, and other identifiers can be placed in these fields:
 - ALTID
 - LICENSE
 - OLDKEY

t. **PATRON MESSAGING PREFERENCES**

- These are settings that patrons can set for messages to be sent to them by email.
 - Item Checkout (emailed checkout slip)
 - Item Due (notice sent the day items are due)
 - Hold Filled (notice sent when hold is Waiting)
 - Item Checkin (emailed checkin slip)
 - Advance Notice (notice sent X-number of days prior to material due date)

u. **CLICK SAVE.**

- v. You will be prompted with a message "**Are you sure you want to save?**"
Select OK.

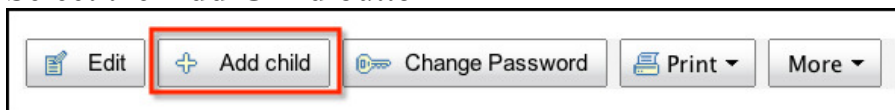
New Card Creation (Child)

****Verify that the child is not already in the system by doing a Patron Search****

Searching note: As of 9/1/10, if you search for a patron using their full name (ex, John Lee Allen, Adam Joshua Smith, or Andrew John Smith), you get no results. If you search using only their first, first name (John Allen, Adam Smith, or Andrew Smith), you get results. **All patrons that have two or more names in the first name box have to be found excluding the middle name. Patrons with two-part last names are also problematic.**

If the Child lives at the same address as the Guarantor:

1. **Search the patron database** for the Guarantor using the Patron Search Box.
 - a. The Guarantor must be an **Adult Patron**
 - b. Professional and Staff accounts will NOT work with this feature at this time
2. Open the **Details page** of the appropriate Guarantor by clicking on the **Name link**
3. Select the **Add Child** button



4. The child's record will pull in data from the adult patron record AND link the adult account to the **Guarantor Information** section.
 - a. Use the drop down menu to indicate their **relationship**
 - i. **Ask:** Are you the parent, grandparent, or legal guardian who will be responsible for this account? Enter the information given.
5. Using the process for the **Adult Card** provided above, complete the Child Patron record.

If the Child does not live at the same address as the Guarantor:

1. Select **New**
2. Choose **Child Patron** from the drop down list
3. Begin to fill in the data as indicated above in the **Adult Card** instructions
4. For the **Guarantor Information** Section:
 - a. Click "**Set to Patron**" to search for the Guarantor



- b. Use the **Search box** to find a list of possible Responsible Adults
 - i. **NOTE:** As of 9/1/10, you must scan or enter the guarantor's patron barcode number for the search to work; if you search by name, you will not return any results.
- c. Click **Select** next to the correct patron and close the pop up menu

- d. This will link the Adult record to the child record in the system and provide a hyperlink to the Child's record from the Adult's Detail page.

| | |
|-----------------------------------|--------------------------|
| Nancy Fury (FURY55555) | |
| 123 Fire Ln Lawrence, KS 66044 | |
| Primary Phone: | (913) 123-4567 |
| Date of birth: | 01/01/1965 |
| Sex: | F |
| Guarantees: | Ned Fury |

- e. Use the drop down menu to indicate their **relationship**
- Ask:** Are you the parent, grandparent, or legal guardian who will be responsible for this account? Enter the information given
- f. Then, using the process from the **adult card** instructions above, complete the Child Patron record.
- Note:** When linking to the guarantor, the guarantor's address is put into the **Main Address** section; this information needs to be moved down to the **Alternate Contact** section, and the child's address put into the **Main Address** section.

LOST CARDS

- If patron has lost their card, offer to issue them a card with a new number.
 - Explain to patron: You will no longer be able to use your old card, should you find it.

How to modify patron's account number and issue a new card:

- Search for the Patron in the Patron Search box
- Click on patron's name
- Click on **Edit**
- Verify that all other information is still correct. If not, make any changes.
- Scroll down to LIBRARY MANAGEMENT and scan the replacement (new) library card number
- Scroll down to **OPAC login** and update the **OPAC login** to the new card number.
- Click on **Save**. This should give you a new screen with modified information.
- Verify any changed information and give new card to patron.