

Cleaning up the patron database

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Agenda

- Patron record migration
- Merge requests
- Patron registration
 - Using paper registrations
 - Retention schedule
 - Creating the patron database record
 - Standards requirement
- Marking inactive vs. deleting
- Helpful reports

Patron record migration

- Patron records are added to consortium database upon migration.
 - No de-duping script as is the case with MARC records.
- Staff need to assess whether or not to merge duplicate records.

Date of Birth	Last Name	First Name	Middle Name	Library Card: Barcode	
1983-07-31 12:0 AM	BORGER	SHAUNA		24330000010000	
	BORGER	SHAUNA		borger-circ1	
	BORGER	SHAUNA		borger-cat1	
	BORGER	SHAUNA		borger-cat2	
	BORGER	SHAUNA		borger-localadmin	
1991-01-01 12:0 AM	Borger	Shauna		sborger	
1983-07-31 12:0 AM	BORGER	SHAUNA		sborger-localadmin	
1983-07-31 12:0 AM	BORGER	SHAUNA		31951002850631	
1970-03-03 12:0 AM	BORGER	SHAUNA		borger-circ2	

Assessing accounts

- Multiple RB accounts
- Resident and a non-resident/PLAC account
 - Downloadable eContent policy on non-resident and PLAC patrons
- Patron moves from one Evergreen library to another (Procedures, page 7 & 8)
 - Pull up old account, issue new card, change home library, verify and update residency info
 - Permissions: Circ1 and up

Merge requests

- Duplicate records at two or more libraries
 - All member libraries must consent to the merging of the records.
 - A joint request to merge the records should be sent to tech support to accomplish the action.
 - If multiple libraries have a local agreement on merging patrons, they don't need individual approval on each patron in the merge request.
 - NOTE: Create a paper trail to make answering questions easier!
- Multiple accounts at the same library may be merged by the localadmin.

Patron registration

- Using paper registrations
 - Pros: Allows staff to go back later and double-check the digital data entry for accuracy
 - Catch email and phone number errors before the patron does not receive their hold notification
 - Cons: Disposing of the records
 - Retention schedule:
http://www.in.gov/icpr/files/county_library.pdf
 - Patron registration records can be destroyed upon completion of a Notice of Destruction, State Form 44905 and distribution of copies of the form to the Clerk of the Circuit Court of the County and to the Indiana Commission on Public Records
 - Be sure you receive a response before acting!

Public Library Retention Schedule

- Patron library card & RB app: Destroy 3 years after patron account becomes inactive
- PLAC & Non-resident app: Destroy after 3 calendar years & after receipt of SBoA audit report & satisfaction of unsettled charges

Digital patron records

- Standards requirement

- Page 5, 590 IAC 6: www.in.gov/legislative/iac/T05900/A00060.PDF

(16) The library shall purge or mark inactive unused library patron cards at least once every three (3) years, deleting those patrons who have not used the card in the last three (3) years and do not owe materials, fines, or fees to the library.

- Evergreen Indiana policy requirement

- Purge or mark inactive unused library patron cards every 12 months

Inactive vs. Deleting

- Mark inactive if
 - They have not used their card in 12 months AND they have outstanding transactions
- Delete the account if
 - They have not used their card in 12 months AND have no outstanding transactions

Chores. . .Don't you love them?!

- Keeping up on record management and doing a little at a time helps in the long run!



Helpful reports

- Shared Folders > Templates > admin > Customer > Expired Patrons by Date Range
 - Localadmin sets the report on expired patrons at their branch to automatically generate (monthly, quarterly, etc.) and email a staff member
 - Mark inactive: Circ1 can pull up the accounts with home libraries at their branch and mark those inactive who need to be
 - Delete: Localadmin at the library branch can assign delete patron permissions to specific Circ1 users at a specific branch so they can also delete patron records at that branch.

The screenshot shows a patron profile for BORGER, SHAUNA. The name is highlighted in a yellow box. Below the name are three links: (Alert), (See Notes), and (Has Bills). The profile is divided into sections: Alert, Status, and a list of details. The Alert section contains the message "Welcome to class!". The Status section lists "Resident" and "WWPLW". The details section includes "Internet Unfiltered", "Account created on 2009-12-14", "Expires on 2015-05-01", "Last Activity 2013-02-14", and "Last updated on 2013-05-01".

BORGER, SHAUNA
(Alert) (See Notes) (Has Bills)
Alert
Welcome to class!
Status
Resident
WWPLW
Internet Unfiltered
Account created on 2009-12-14
Expires on 2015-05-01
Last Activity 2013-02-14
Last updated on 2013-05-01

Example

- Delete or mark inactive?

(Expired)

Status

ReciprocalBorrower
ISLI
Internet Filtered
Account created on 2011-05-27
Expires on 2012-05-27
Last Activity <Unset>
Last updated on <Unset>

x

Refresh	Check Out	Items Out	Holds	Bills	Edit	Messages	Other ▾
		0	0/0	\$ 0.00			

Helpful reports

- Shared Folders > Templates > admin > Customer > Inactive Patrons
 - Localadmin sets the report on inactive patrons at their branch to automatically generate (monthly, quarterly, etc.) and email a staff member
 - Circ1 or higher can determine whether the patron at their branch can be deleted b/c transactions have been closed

Example

- Delete?

Refresh **Check Out** Items Out Holds Bills Edit Messages Other ▾

0 0/0 \$ 0.00

(Barred) (Expired) (In-Active) (Alert)

Alert
card registration incomplete

Status

ReciprocalBorrower
ISLI
Internet Unfiltered
Account created on 2010-04-26
Expires on 2011-06-29
Last Activity <Unset>
Last updated on 2012-05-01

Holds: 0
Available: 0
Bills: \$ 0.00
Check Outs: 0
Overdue: 0
Long Overdue: 0
Claimed Returned: 0
Lost: 0
Non Cataloged: 0



Alert

Alert message: "card registration incomplete"

Patron account is BARRED.

Patron account is INACTIVE.

Patron account is EXPIRED.

Press a navigation button above (for example, Check Out) to clear this alert.

Things to consider. . .

- Patron accounts and expiration
 - Notification methods
 - Staff: Automatic alert appears in staff client 30 days before patron account expires
 - Checkout due date shortens to reflect expiration date
 - Patron: Automatic email notification sent to patron 30 days before expiration date
 - “It looks like we need to update your account. . .”
 - Resident cards can be renewed at ANY EI library if the patron’s ID matches the account information and the patron is in good standing (Procedures, Page 7)
 - All other accounts must be renewed at the home library

Questions?

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