

MORE Patron Registration Guidelines Draft
For review by MORE Operations Committee
March 2018

General notes:

- MORE-member library staff verify an individual's identity and residence when registering them as a new patron.
- Local library policy dictates the methods libraries may use to verify identity and place of residence.
- Individuals may have one MORE library record.

Minimum data requirements for an electronic patron record

- All fixed-length fields, including birthdate
- Name, including full middle name
- Residential address
- Phone number or email address

Checks before issuing a new card

- Perform a truncated name search
- If a hyphenated name is provided, perform truncated name searches on both parts
- Check search results for alternate names

Editing and updating patron records

- Complete new paper registration form if municipality (Act 150 loc) has changed
- Complete new paper registration form for existing patrons who have turned 18 since they originally registered
- If updating Act 150 loc or address, add "updated [date] [library]/[initials]" to the original inputter data in the electronic patron record. Remove any prior "updated" messages.

Electronic record retention

- Delete patron records with expiration dates 3+ years past, CIRCACTIVE dates 1+ year past, and owing less than \$5 in fines
- Delete overdue fines assessed more than 5 years ago
- Delete bills and manual charges assessed more than 15 years ago

Other adjustments: Rename "ACT 150 LOC" field name