

Multiple Patron Accounts / Patron Record Merging

If a patron is discovered to have multiple accounts, the accounts may be merged. This facilitates patron database cleanup and helps to address the issue of outstanding charges on multiple accounts. To see a patron's previously active cards, staff may click the See All button on the Patron Edit screen.

Patron record merging is restricted to PINES staff due to the intensive nature of the updates involved. Contact the PINES staff via the Help Desk with the accounts that should be merged and which of the accounts is current. PINES has configured patron merging to preserve all history on all merged records [2012.03].

Requesting an Account Merge

If you encounter two or more accounts that belong to the same patron, please submit a [Help Desk](#) ticket. We will need:

- Patron Barcodes (Indicate which one should be the "Lead" or primary barcode. If one of the accounts is in collections, then that account must be marked as the lead account.)
- Patron Name

Ideally, we would also appreciate:

- Patron Date of Birth
- Patron ID and/or Parent Information

If the account names or other identifying information do not match, please explain what criteria you used to identify them as the same patron. We will store this in the help desk in case for record-keeping purposes in case there are any questions in the future about why specific accounts were merged.

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