

Creating New Patron Accounts

1. Check for Existing Accounts: To avoid creating a duplicate record, library staff should always search for the patron's name in the Evergreen patron database before entering a new patron record. The "Include inactive patrons?" box should be checked and the "Limit results to patrons in:" option should be set to "PINES." If an identical name is found, compare the address, birth date, and other identifying information on the screen with the card application to determine if the patron is already registered in the system.

- If you find the patron already has a record in the system, DO NOT create another record. Instead, update the existing record with the corrected information.
- If the patron's information is outdated, update the information. (See: [Updating Accounts](#))
- If a patron has lost his or her card, issue a replacement card. (See: [Lost Cards](#))

2. Create New Account: If the name is NOT found in the database, open the Register Patron screen. The PINES user record can contain as many addresses as necessary, and notes and comments that display to all PINES facilities. Required fields are:

- Barcode
- OPAC/Staff Client User Name
- Password
- First Name
- Middle Name is strongly encouraged but not required.
- Last Name
- Date of Birth
- Primary Identification Type (and information)
- Home Library
- Main (Profile) Permission Group (See: [User Permission Groups](#))
- Privilege Expiration Date
- Internet Access Level
- Address (Type, Postal Code, Street (1), City)
- Response to the Voter Registration Survey Question (See: [Voter Registration Survey](#))
- See Also: [Account Registration Field Descriptions](#)



Staff should not enter "placeholder" information (e.g. "N/A", "No Middle Name", "NMI" or the like) in any field when registering a patron. Please avoid punctuation such as quotation marks (i.e., James "Jimmy" Jones) or parentheses (i.e. Martin (Alan) Smith) to indicate nicknames or preferred names. Unnecessary spaces, misplaced apostrophes, and other typing errors can cause the search for a patron to return incorrect results. If staff wishes to record a nickname for local use, it could be added to the Alerts field.

3. Save: When you are finished entering the patron's information, click the Save button and ask the patron to sign on the signature strip on the PINES card. It is a local decision on the part of each Library System whether the PINES card will be given to the user at registration or be mailed [1999.10]. Consult your circulation supervisor for the policy at your library.

4. Records Retention: Follow local policy for storing signed applications. (See: [Record Retention Policies](#))

Patron Self-Registration Form

PINES rolled out a new automated e-card registration process on September 8, 2020. This eliminates the previous pending patron account process to provide better service to patrons and reduce work for library staff.

1. When a patron successfully submits the online application form ([Patron Self-Registration Form](#)), the system creates an account which provides immediate access to e-resources. This account is valid for 1 year, but does not allow holds or checkouts.
2. To obtain a full PINES card, the patron will come into the library and provide their e-card number and proof of ID.
3. Staff should then:
 1. Check for duplicate accounts.
 2. Check the provided ID/documentation to verify that the information on the account is correct and up to date.
 3. Give the patron a PINES card and update the barcode in the account.
 4. Change the permission group from Quipu to Patron.

Cloning a Patron with the Same Address

When a member of a family residing at the same household as an existing member is registering for an account, the Save and Clone function can be used. The cloned patrons will automatically be grouped with the first patron.

1. Register the first family member using the procedure outlined above (or, Edit the account of an existing family member).
2. Click Save and Clone.
3. Complete the patron information as normal, modifying the information that was filled in automatically as needed.

Sample Registration Forms

- Sample Patron Form 1 (Text Only):

English

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Spanish

- Sample Patron Form 2 (Formatted):

Editable Word Document

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PDF Form

- Sample Institution Forms:

Sample 1

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Sample 2

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