

# Patron Registration Form Field Descriptions

- **Barcode** - Staff should scan the library card barcode to enter. Accounts created for staff use only may be given a unique identifier (Example: CLAYTN-HQSCIR1) other than a barcode.
- **OPAC/Staff Client User Name** - The username field will be populated with the library card number by default. Users may later choose to change their username to a text name via the OPAC.
- **Password/Verify Password** - The password will be set to the last four digits of the first phone number provided after it is entered. If the patron does not have a phone, the system will create a randomly-generated PIN. Staff should provide the PIN to the patron with instructions to set a new password for themselves via the OPAC and encourage them to do so as soon as possible.
- **Primary Name (ie, Legal Name)**
  - **Prefix/Title** - Optional (Use for Mr., Ms., Dr., etc.)
  - **First Name/Middle Name/Last Name** - Staff should enter names with an initial capital letter and lowercase letters following (e.g., Jacky or Young). Use apostrophes in names as appropriate. (e.g. O'Connor). Because of the large size of the PINES patron database, staff are strongly encouraged to enter full first, middle and last names. The legal name of the patron should be entered as shown on their ID. No nicknames should be added or listed here (see Preferred Name and Name Keywords below). If the patron has a single name (one word or one letter), enter that name in both the First Name and the Last Name fields [2013.12].



If the patron does not have a middle name, leave the field blank. Do **not** enter "NMN" or "No Middle Name." If you wish, you may add a note on the account that the patron does not have a middle name.

- **Suffix** - Optional. The suffix of names with Sr., Jr., III, should be entered in this field. They may be manually typed or selected from one of the options in the dropdown menu supplied.
- **Preferred Name**
  - The same fields are available in the Preferred Name tab as in the Primary Name tab. Use to enter the name that the patron prefers to be known by if it is different than the legal name (nickname, middle name, alternate name, etc.) This name will appear in the patron's OPAC "My Account" view, on Hold Slips, and on the Patron Summary Bar underneath the legal name. [Feature added 2019.01]
- **Name Keywords** - Optional. Use this field to store other names the patron is or has been known by, previous married names, or other keywords which should be searchable. For example, your library may wish to enter 'fol' for all of your patrons who are members of your Friends of the Library group. These words may be searched in the new Keyword patron search field. [Feature added 2019.01]
- **OPAC/Staff Client Holds Alias** - This field is provided as a privacy measure for patrons who would not like their actual name to be used on hold slips (this is configurable by your Local System Administrator). PINES/GPLs staff does not recommend the use of this field at this time.
- **Date of Birth** - Staff may enter the birthdate manually in the format MM/DD/YYYY, or may use the supplied calendar tool to enter the date automatically. Birth date is a required field [2010.02]. For cases in which the patron date of birth is unknown, staff will enter the dummy date "01/01/1901" to allow the patron record to be saved [2011.09].

- **Juvenile** - This checkbox will automatically be checked if the birthdate entered indicates that the patron is under 18 years old [2006.05]. If the patron is a juvenile, the Parent/Guardian field must be filled out (at the time of this documentation, the Evergreen software does not require the Parent/Guardian field, but this policy indicates that it should be).
- **Parent/Guardian** - This field is required for juvenile accounts, as the person signing the application form for the juvenile is accepting responsibility for that library card.



**Best Practice:** Enter the parent or guardian's name followed by the relationship ("Jane Smith, Mom"). The parent or guardian's ID should be entered in the Primary Identification field.

- **Primary Identification Type** - Staff may choose either Driver's License or Other from the dropdown menu. PINES prohibits the use of patron Social Security Numbers for identification [2006.11].
- **Primary Identification** - Staff should enter driver's license number in the specified format (GA-XXXXXXXX), substituting the appropriate state abbreviation (e.g., FL, AL, SC, TN) for non-Georgia drivers licenses. If the driver's license was not used for primary identification, enter relevant information and explain in the Alert Message field if necessary.



**Driver's License Format:** It is crucial that driver's licenses are entered in a consistent format in order to alert staff to duplicate accounts. All driver's licenses should begin with the two-letter state abbreviation followed by a dash and then the number ("GA-123456789").



**Best Practice:** If the ID is a driver's license from a state that uses dashes or other characters, enter it as the two-letter state abbreviation followed by a dash and then the number as it is typed on the ID ("FL-123-456-78-9-0").



**Best Practice:** If the ID used is not a driver's license, enter the unique alpha-numeric portion of the ID and then follow it by a brief description of the type of ID. For example, "123456789 Military" or "123456789 US Passport". This way, if that ID is presented again at a later date, the staff can search just for the first portion ("123456789") without needing to know exactly how the description was entered.



**Best Practice:** If the ID belongs to a parent or guardian, enter it in the Primary Identification Field and then enter the name in the field below.

- **Secondary Identification Type** - Use only when a second piece of identification is required.
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- **Email Address** - Staff should encourage PINES users to provide email addresses for the benefit of receiving automated hold, overdue, and reminder (pre-overdue reminder) notices. An email

address stored in the system also allows the patron to use the automated “Forgot your password?” feature in the OPAC. (NOTE: If an email address is entered, the patron will receive overdue notices, as well as holds notices, via email. Final overdue notices will be mailed via U.S. Mail as required by Georgia law).

- **Email checkout receipts by default?** - If this box is checked, patron will automatically receive emails instead of printed receipts at checkout time. (Staff may choose to print out a copy as well.) [Feature added 2018.01]
- **Daytime Phone** - Day telephone number including area code. This is the patron’s preferred phone number of contact and will be used for automated telephone notifications. When setting up a new account, Evergreen will automatically assign the last four digits of this phone number as the patron’s initial PIN for online account access.
- **Evening Phone** - Night telephone number including area code.
- **Other Phone** - Telephone number (usually, cell phone) including area code.
- **Home Library** - Users will have system-wide borrowing privileges yet belong to a “home” library. Staff will designate the home library when they enter the user record in PINES. This field will default to the PINES location at which the user account is being entered.
- **Main (Profile) Permission Group** - The patron profile determines the user’s loan period and fine rates. One of the profiles below will be assigned to each user. Some library systems may choose not to use certain profiles (for example, Friend or Trustee). Library systems may also wish to direct Circulation staff to seek approval from a manager before assigning certain profiles (such as Homebound or GLASS) – this would be a matter of local policy rather than a permissions setting in the system. (See: [User Permission Groups](#))
- **Privilege Expiration Date** - Automatically set based on the Profile Group, but may be edited by staff to a closer date if necessary. The date should not be entered for a later date than that which is automatically selected.
- **Internet Access Level** - Defaults to Filtered, but may be set to Unfiltered or No Access.
- **Active** - Checked by default. If unchecked, the patron is no longer considered an active PINES patron and will no longer be included in statistical reports. (See: [Inactive Patrons](#))
- **Barred** - (See: [Barred Patrons](#))
- **Is Group Lead Account** - Unchecked by default. If multiple patrons are grouped together (example: a parent with children), one patron in the group will be the lead account.
- **Claims Returned Count** - Shows the number of items marked Claims Returned that the patron has accrued. After accruing 5 Claims Returned items, the patron may not have any more items set Claims Returned [1999.10]. This count may be reset by editing the patron record.
- **Claims Never Checked Out Count** - This feature is not used in PINES [2012.03].
- **Alert Message** - Staff may enter an alert message that will appear when the account is retrieved.
- **Default Hold Pickup Location** - If set, holds placed for this patron will default to be delivered to this location. May or may not be the same as the Home Library.
- **Default Phone Number** - Default phone number to be called when a hold is available for pickup (optional).
- **Default SMS/Text Number** - Default phone number to be used if SMS/Text notification option is selected for a hold.
- **Default SMS/Text Carrier** - Phone service provider that the patron’s Default SMS/Text Number is associated with. Some carriers are not listed because they will not accept SMS messages from the Evergreen server.
- **Collections: Exempt** - This feature is not used in PINES.
- **Hold is Behind Circ Desk** - For patrons who pick up holds at a library branch that places holds for pickup in a public area by default and who are concerned about privacy. If this box is checked, the

patron's holds will be stored behind the circulation desk and not in a public area.

- **Hold Notification Format** (Phone and/or Email) - Sets default contact preference when holds are available for pickup.
- **Address Fields**
  - [Postal Addressing Standards](#)
  - Mailing / Billing - Both are selected by default. An additional address may be selected if necessary.
  - Type - Defaults to "MAILING." Staff must otherwise enter a short description of the address (e.g. "Lake House"). For addresses that were imported from PINES' previous automation system, this field will be marked "LEGACY ADDRESS."
  - Postal Code - Standard 5- or 9- digit postal codes are accepted. City, State, and County information are automatically populated for Georgia addresses when this field is entered (NOTE: the automatically entered information should be checked for accuracy, particularly when one postal code covers portions of more than one city).
  - Street (1) - The number and street for the address.
  - Street (2) - Apartment, Lot, Suite, or additional address information.
  - City - City of residence.
  - County - County of residence (optional, but auto-populated by Postal Code entry). Although optional, this is useful for statistical reports.
  - State - State of residence (if a Georgia Postal Code is entered, defaults to GA).
  - Country - Country of residence (defaults to USA).
  - Valid Address? - Checked by default. May be edited if an address is found to be invalid.
  - Within City Limits? - Based on patron-provided information, staff may uncheck this box or leave it checked (checked by default). This is useful for statistical reports.
  - New Address - Additional addresses may be added as needed. Addresses may also be deleted, but the primary address may not be deleted. Note: For accounts that are grouped, the owner of the address must be edited with the correct address or the patron must be removed from the group to change a single patron's address.
- **Statistical Categories** - The purpose of statistical categories is to establish controlled vocabulary that describes an individual user's special characteristics for statistical analysis of circulation and registration. The "Non-English Primary Language" category was determined to be a universal statistical category in the PINES patron record [2006.05]. PINES does not require the use of statistical categories. They may be created by individual library systems as needed by the Local System Administrator.
- **Voter Registration** - PINES uses the Survey function to electronically record patron voter registration responses to be in compliance with Georgia law. (See: [Voter Registration Survey](#))
- **Additional Surveys** - Additional Surveys may be created at the local library system level by the Local System Administrator.

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Last update: **2019/01/09 02:34**

