Renewing & Updating Patron Accounts

Updating a Patron Record

To edit a user record, retrieve the patron record (Search > Search for Patrons). Verify that all information is up to date and in the correct format. See: Patron Registration Field Descriptions

Card Expiration and Renewal

Most types of PINES cards are valid for 2 years. The system will notify staff that a card is about to expire (within 30 days) or has already expired by placing an alert on the patron record which displays whenever the patron record is retrieved. Patrons can see their own expiration dates when logging into "My Account" via the OPAC. Patrons that include an email address in their account will be sent an automated courtesy notice 30 days prior to their account expiration date.

At renewal time, staff should ask to see current identification and update the patron's information (address, phone number, etc.) This is a good time to add or update the patron's email address, and confirm that the user's full name is entered. Be sure to correct any typos or capitalization problems in the record, and verify that the Driver's License is in the correct format (GA-123456789).

> ⚠️ The patron must resolve all outstanding fines and fees in order to renew her/his card. [2009.12]
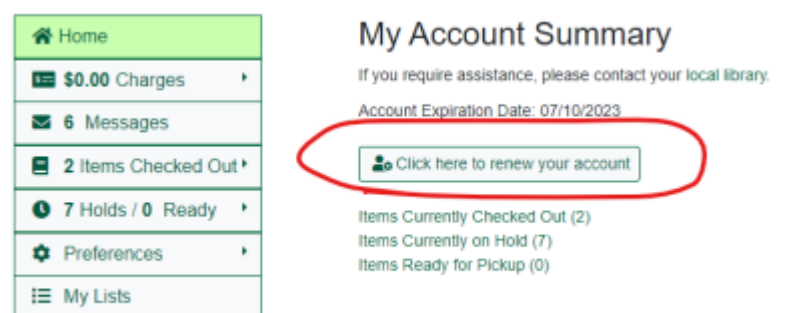
If a user's account is set to expire during the proposed renewal period for items, Evergreen will not allow an item renewal past the patron expiration date.

Online Account Renewal

The functionality to renew accounts online became available July 2023. The online account renewal form will be available to patrons through the "My Account" section of the OPAC if the following conditions are met:

- The patron account is active and the expiration date is no more than 30 days in the future.
- The patron's permission group is either Patron, Friend, GLS, Homebound, Quipu, or Trustee.
- The patron's account is in good standing (no outstanding bills, no blocks, is not barred, has not been flagged with an invalid address or phone number).
- The patron has not already been given a temporary renewal.

If the patron is eligible for online renewal, a button titled "Click here to renew your account" will appear under "My Account Summary." Patrons should click this to access the renewal form.

Once the patron has filled out the form and confirmed their information, patrons should click "Submit." They will be led to a screen that confirms the renewal and provides the new expiration date.

If the patron does not have an address change, the account will be renewed without requiring the patron to come into the library. If the patron does have an address change, the account will be given a 30-day temporary renewal and the patron will be required to come into the library with their proof of address so that staff may verify it and fully renew the account. (Homebound and GLS patrons are exempted from this requirement.)

Temporary Renewals

If a patron is eligible to renew their account online but their address has changed, they will automatically be given a 30-day temporary renewal and be directed to visit a PINES library with their proof of address for a full renewal term. Please note this applies to Quipu accounts as well. Only Homebound and GLS patrons are not required to visit a library for renewal.

A patron note will be automatically added to their account which will alert staff to the fact that the patron has already received a temporary renewal. This note will prevent the patron from submitting another temporary renewal.

When the patron comes into the library to complete their account renewal, staff should:

1. Verify the patron's new proof of address
2. Update the patron's account expiration date
3. Remove or archive the patron note

Incorrect Addresses

When mail is returned to the library due to an incorrect address, the patron's address should be marked as invalid. These users will then be omitted from the overdue notice reports.

1. In order to identify the users who need corrected address information, the "valid" checkbox beside the address in the user record must be unchecked. Staff should do this whenever mail is returned.
2. The patron record will be marked with an (Invalid Address) message.
3. Once this procedure is under way, each library may periodically wish to run a report of users with invalid addresses, in order to determine which items are still checked out and presumed lost, in case those items should be discarded.

When a PINES Patron Moves to Another PINES Library System

If a patron moves from one PINES library system to another, change the home library of the patron from the old library system to the new library system and update address, telephone numbers, and hold pickup location in the patron record. The patron may keep the same card if they wish to, however it is recommended that staff replace the patron's card with one from the new library system, as electronic reference database access is often based on patron card number. (Please note that the $2 card replacement fee is waived in this scenario.) Although it won't count as a new registration, the patron will now be included in reports of all patrons registered in the new library system.

If a patron moves from one library to another within the same system, the home library and hold pickup location should be changed in the patron record and the address and telephone information should be updated.

Georgia law mandates that library staff offer patrons the opportunity to register to vote when receiving or making changes to their library accounts.

Patron Record Deletion / Deceased Patrons

Evergreen contains a feature that allows the complete deletion of patron accounts, but this is restricted to extreme cases and may only be performed by PINES staff at the request of a library director.

In the case of deceased patrons, the best practice is to:

- Change the name on the patron account to first name "Deceased" and last name "Patron"
- Delete the driver's license number or ID, as well as any other personally identifiable information.
- Mark the phone number and email address (if present) as invalid.
- Change the account expiration date to a past date.
- Uncheck the Active box.
- Change the password so that no one is able to log into the account from the OPAC.

This will effectively anonymize that person's account without affecting circulation or billing history.

When A Staff Member Leaves Employment

When a PINES staff member leaves employment, his or her account should be immediately changed from a staff permission group to the standard Patron permission group. The email address and other contact info should be updated to reflect personal rather than business information.

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<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:
https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:accounts:update_accounts

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