

# Patron Registration Procedures

## *Renewing Cards for your Home Agency*

At each expiration, verify all information. Record any changes to the patron's computer record and renew the card to the next expiration date. Edit the paper copy according to your library's procedures. This is a good time to tell patrons about overdue materials and fines on their account.

## *Renewing Cards for Another Home Agency*

If you are renewing a card for another agency, verify all information. Renew card according to the standard renewal period for your library. Fill out the ~~blue Patron Record Update form~~[online Patron Update Form](#) and send it to the patron's home agency. (The home agency may change the renewal to their standard renewal period once they receive the Patron Record Update form.) This is a good time to tell patrons about overdue materials and fines on their account.

## *Address Changes*

Take current address information from the patron and update the computer record accordingly. If you are updating an address for another agency, fill out the ~~blue Patron Record Update form~~[online Patron Update Form](#) and route to the home agency.

## *Home Agency Change*

Libraries must assign patron's home agency to their own library. If a patron wishes to change home agencies, they must re-register at the new home agency. If you are the correct home agency library, ask the patron to complete an OWLSnet registration form to begin the patron registration process. A form of identification and proof of address is required.

While, generally, a patron requests a home agency change, a library may require a patron to re-register at their library under the following circumstances:

1. Patron is using the library where they reside, but are registered at a different home agency (usually this will occur when they move).
2. Patron is exclusively using a library (which is not the library where they reside), but is registered at the library where they reside.

Note: Patron blocks (total number of holds, checkouts and checkouts of media) are determined by home agency. Circulation counts for online renewals are also determined by home agency.

[When changing a patron's home agency, inform them that their hold pick up location will default to the new home agency.](#)

Take the patron's old card and give them a new card with the new barcode number. If you are able to destroy the old card, you may delete the old barcode and replace it with the new one. Otherwise, enter the words "replaced mm/yy" and add your initials and library code after the old barcode. Add a new barcode field and enter the new barcode, moving it up to the top of the barcode list. Change the home agency and library location to your library. If the patron has moved, make sure you change the municipality code, as well as the address. Inform the previous home agency library ~~with a Patron Record Update form~~[using the online Patron Update Form](#).

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Note: If the patron's OWLSnet card is in good condition, the barcode may be reused. On the ~~Patron Record Update form~~ [Patron Update Form](#), enter the barcode as both the old and new/current barcode. Note that the barcode is being reused.

### *Name Changes*

Have the patron fill out a new registration card. Issue a new card and take the old card.

If the patron wants to keep their original card, have them fill out a new registration card. Keep the original name on the account and add in the new name, moving it to the top. Put a note on the account indicating the reason for the second name field.

### *Mail Returned*

If a mailed notice is returned, the library (who may not be the home agency) should put a *mail returned* manual block on the patron's record and insert the following text in the first line of the address field:

\*\*\* MAIL RETURNED (MANUAL BLOCK) \*\*\*

If there is additional information, please put it in a note on the record with the date and your initials. The next library to check out to the patron should verify and correct the patron's address, remove the manual block and send a patron update form to the home agency.

## Questions and Answers

Q: Can staff at one library persuade a patron to change the home agency?

A: The patron must choose the home agency, which is either the library that the patron uses the most, or the library where the patron resides. Staff may require a patron to re-register under certain prescribed circumstances.

Q: What is the consequence of changing the home agency?

A: Patron blocks, which stipulate the maximum number of checked out items, maximum number of videos and CDs and maximum number of holds, are set by home agency. [Hold pick up location will default to the home agency.](#)

Q: Will it change my library's circulation statistics?

A: Possibly. Renewals are assigned to the patron's home agency, so it makes sense for a patron's home agency to be their library of primary use.

Q: Can libraries change the patron's home agency for other OWLSnet libraries?

A: No. The consortium has agreed that the patron has to register at the home agency library. Patron registration procedures may vary slightly from library to library, such as requesting a driver's license number.

Q: Can libraries check out to registered patrons that require a home agency change?

A: Yes. Place a stop on the patron's card and note in the delinquency notes field that the patron