

Phone Registration

Libraries that have staff available to take registrations over the phone should follow the following steps during the COVID-19 pandemic closures.

1. Search Sierra to make sure the caller doesn't already have a card.
2. Ask the patron for the following information and enter it into Sierra:
 - a. Name
 - b. Address
 - c. Telephone
 - d. Email
 - e. PIN (you can also make this the last 4 digits of their phone number if they don't offer one)
3. Make the P-type Online Registration.
4. Change the Patron Message to a SELF REGISTRATION.
 - a. This message has been temporarily edited to help staff convert these to new patrons as they come in to make permanent cards.
5. Update the expiration date to June 1st, 2020.
6. Enter a barcode. If you are working from home and do not have any barcodes, please alert OWLS.
 - a. Put the cards in a designated place to distribute as libraries reopen.
7. Update the home agency based on the address the patron provided.
 - a. DO NOT enter a municipality code until you have verified the patron's address. (See below.) Municipality code should remain 0 Unassigned.
8. You can now give the patron their barcode number to access online resources.
 - a. Ask the patron to write down their PIN as it will not be provided in the follow-up email.
9. Email the patron their barcode number. Even if you gave them this information over the phone, please do this step. See the email template below.
 - a. Ask the patron to verify their local library and home address by having them email a scanned image or a photo of a piece of mail with their name, address and a recent postmark on it to an email address you are checking. **DO NOT ASK FOR GOVERNMENT ISSUED DOCUMENTS** i.e. driver's license, passport, military IDs, etc.
 - b. If the patron responds with the appropriate documentation change the Municipality Code as appropriate.
10. Save and Close.

Email after Phone Registration:

Thank you for calling to open a library card. We've created a temporary card for you to use to access online resources during the COVID-19 pandemic while your local library is closed.

Your barcode is []. You can now access all the resources listed [here!](#)

Libraries depend on municipal and county funding to operate, so we would very much appreciate if you would tell us which library is closest to you and upload a picture of a piece of mail with your name and current address. Please do NOT send government issued documents (photo IDs, passports, social security cards, etc.) over email—the outside of an envelope is fine. This will help make sure your library gets credit for your registration.

Thank you for supporting your local library!