CCS PATRON ENTRY STANDARDS

These patron entry standards focus primarily on how user record information should be input for persons, commonly called library patrons. Institutional user records and local "in house" user records will vary slightly in obvious ways but are not covered by this document.

Since a legally registered user in good standing of a CCS library has certain privileges to use other libraries, the user record is shared by all CCS member libraries, and as such, ought to conform to the standards agreed upon by its members.

Any library requesting materials from another library is responsible for making sure that user information is complete and conforms to CCS guidelines.

User Information and Maintenance

Before registering any new patron in the database, determine if a record for the patron already exists. If you find a record, make certain that the patron is in good standing before proceeding. Modify the existing patron record rather than enter a duplicate record.

SEARCHING TIP: Doing a Browse search by the patron’s last name only is recommended because of possible variants in first names.

- CASE

Use mixed case (upper-case/lower-case) for all Names, Streets and Cities. Refrain from using ALL CAPS.

Example:

Mr. John Q. Doe
123 S. Main St.
Anywhere, IL 60000-9876

- PUNCTUATION AND SPACING

There should be NO spaces preceding any beginning data in any field. There should be a comma and one space separating the City and State. There should be NO slash separating the City and State. There should be NO period at the end of two-letter State abbreviations.
**New User Registration Wizard**

**Barcode:** Scan or enter the new barcode assigned to the user.

**Profile name:** The PROFILE is important because it determines the privileges a patron has at a given library. Enter or use the pull-down list for the new user's profile. Most of them will be **XXXPUBLIC** or **XXXPATRON** where XXX is your library’s 3-letter symbol. **PUBLIC** is the profile used for most other non-CCS reciprocal borrowers, except **OUTOFSTATE**, which is for out-of-state reciprocal borrowers, and **CPCPUBLIC**, which is used for all **Chicago** Public users.

**BASIC INFO TAB**
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Last name, First: Capitalize the first letter of each name. Enter the patron's last name, a comma, and the first name. Enter the middle initial, if known or submitted. (Sometimes it is necessary to differentiate two persons with otherwise similar names.) The comma is critical—it acts as a subfield delimiter, telling the computer which portion to file as the surname and which as the forename(s). When a mailing form is printed, the names are inverted according to the position of the comma. If you are entering a patron who uses a suffix (such as Sr., Jr., III) do not enter a comma before it.

**Examples:**
- Fairbanks Jr., Douglas inverts to Douglas Fairbanks Jr.
- Fairbanks Sr., Douglas inverts to Douglas Fairbanks Sr.
- Rockefeller IV, John D. inverts to John D. Rockefeller IV
- Luce, Claire Booth inverts to Claire Booth Luce

Title: Enter a personal title if one is provided; otherwise, leave the field blank. Abbreviations are recommended in this field.

**Examples:**
- Dr. (for Doctor)
- Fr. (for Father)
- Mr. (Mister)
- Sr. (Sister) (as opposed to Senior, which would be in the name field)
- Rev. (Reverend)

Alt ID: The patron's Driver's License or State ID number is entered here. The barcode found on the back of the license ID card can be scanned by laser. After scanning, click on <continue registering>.

Group ID: Enter the patron's telephone number, including area code. DO NOT include parentheses, hyphens or spaces.

**Examples:**
- 8473425300 NOT (847) 342-5300
- 8159876543 NOT (815) 987-6543
- 7731234567 NOT (773) 123-4567

Library: This is system-supplied from your workstation's default properties. You should not enter a patron from another CCS library; they should be registered at their own library first. A patron from any other library OUTSIDE CCS, should be given the library CCS.

Profile name: This is system-supplied and should be the same as the profile you entered on the first screen.
Privilege expires: If there is an expiration date for the patron’s card, this is where it is input. If the user’s Profile has an expiration period, the expiration date will be filled in automatically.

Password: The default password is PATRON. Users should be encouraged to change this online themselves to protect their privacy.

Status: OK is normal; BARRED may be chosen by the library in special instances when a person should be stopped (lost or stolen card, privileges abused, etc.) When barring a patron, give the reason and your library’s agency code, initials and date, in the DELNOTES field (Extended Info tab). Other statuses are dynamic and system-supplied.

Web auth id: This is not used in CCS.
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**DEMOGRAPHICS TAB**

User cat1: This is used for the library's local statistics. Use local list.

User cat2: This is used for the Patron's home library. This field is for producing local and reciprocal borrowing statistics.

User cat3: The consortium uses this field for cases where the library entering the reciprocal borrower wants statistics for the system only, and not stats for the user's specific library. For libraries, this is a local option; work with the computer room to set this up.

User cat4: Local option; work with the computer room to set this up.

User cat5: Local option; work with the computer room to set this up.

**Examples:**
One library uses LVKFA in User cat 4 to mark all of their patrons that participate in a Favorite Author program, making it easy to obtain a list of those patrons. Another User cat is marked with LVKCOLL to indicate that a patron has been sent to a collection agency.

Department: This field is generally ignored, as it was created by Sirsidynix for academic libraries.

Birth date: Enter the patron's date of birth (mm/dd/yyyy) whenever it is possible to obtain. This helps with demographic statistics and can differentiate a minor from an adult. The system calculates the age automatically and fills in the "Age" field. This also assists in determining if two persons with similar names are actually the same person.
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**Examples:** (For months or days 1-9, one digit is permissable for inputting; the system does not fill in a leading zero)

**ADDRESSES TAB**

**STREET**

Input the house number, unit number and street as it should appear for mailing purposes. Refrain from using all CAPS. (You may abbreviate North, South, etc. in STREET address portions. **Example:** 100 N. Main St.)

See the section at the end of this document for instructions on how to create additional fields.

**CITY/STATE**

DO NOT ABBREVIATE CITY NAMES; spell them out entirely.

**Examples:**
- East Dundee NOT E. Dundee
- Fort Sheridan NOT Ft. Sheridan
- Highland Park NOT Highland Pk. or H. P.
- Lake in the Hills NOT LITH or Lith
- North Barrington NOT N. Barrington or No. Barrington
- Prospect Heights NOT Prospect Hts.
- Saint Charles NOT St. Charles

**STATE ABBREVIATIONS**

Use the 2-letter State abbreviations recommended by the United States Postal Service: **IL, WI, IN, IA**
The postal abbreviation for **Illinois** is **IL** NOT Il, Il., Ill, Ill., IL., Ills.

If you are uncertain of the abbreviation(s) go to the United States Postal Service website at [http://zip4.usps.com/zip4/welcome.jsp](http://zip4.usps.com/zip4/welcome.jsp)

The tabs across the top help you look up addresses in different ways. There's also a hyperlink to "**Find state abbreviation**" on every search form.

According to the USPS "**Long Lake is not acceptable-- use Ingleside**"
According to the USPS "**Lith is not acceptable-- use Lake in the Hills**"

**ZIP** For 5-digit and 9-digit ZIP codes. If an address is bad, input **DO NOT MAIL** in this field.

**PHONE** Notices and reports print from this field whenever specified; this number is used by SVA (automated telephone messaging system); parentheses and hyphens are allowed. **Examples:**  
(847)356-8527  
847-356-8527  
8473568527  

If a patron prefers to receive notices by email, "E-mail" must follow the phone number, separated by a space. This is true for any other information such as "homebound." Important: No such information can precede the phone number or automated telephone notification will not work correctly for that user. **Example:** (847)342-5303 E-mail

**CARE/OF** Use if the patron wants notices mailed to the attention of some other person or business. You need to enter "c/o" at the beginning of the field in order for it to print on notices. **Example:** c/o Jane Doe

**ROOM** This was created for use by school libraries. Do not use this field in CCS.

**EMAIL** Notices will be sent to the user's email address found here. Also see guidelines for inputting PHONE field, above.

**WORKPHONE** This is for additional phone contact information.
UNIQUEMGMT  A blank is a default "yes" (eligible for collection agency). Y in this field means eligible for collection; N in this field prevents going to collection agency.

PREV_ID  Previous User ID. This is a dynamic field that is automatically system-supplied if a patron is reregistered with a new user ID.

PREV_ID2  Same as above; dynamically supplied for subsequent User IDs.

COPYCARD  No known standardized use in CCS. If you use it, please inform CCS staff of what information is stored there.

STUDENT_ID  No known standardized use in CCS.

LANGUAGE  Blank is the default for English. If another language is the patron’s preferred language, indicate it here. For Unique Management to send collection notices in Spanish, indicate SPANISH in all caps.

COMMENT  Be sure comments are phrased in a neutral manner. Here is where reminders for staff can be input.

Example: patron is deaf
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**DELLNOTES**

This field is where reasons for delinquency or information about a barred patron (see Status, page 4) must be placed. Be clear about what the problem is and remember to include library agency code, date, and staff initials.

*Examples:*
- bad check, LVK, 5/16/08, DR
- damaged material, RLK, 4/11/07, gg
- missing parts to an item, MUK, 6/22/08, TMH
- patron has moved, ALK, 9/20/07, GC
- Mail was returned, WNK, 2/12/08, JW
- Verify contact info., NBK, 3/26/08, aw

**LOSTITEM**

Do not enter data here; it is dynamically supplied.

**BIRTHDATE**

Any data found in this field was migrated from the former system.

**LICENSE**

Formerly used for Driver's license. Use Alt ID in Basic Info tab instead.

**STAFF**

Enter the initials of the staff member inputting the patron data. Example: DUK/JE

Other data found here may be automatically-inserted coded transactions from Unique Management collection agency. *(A library may opt to have new transactions replace existing data, but it is standard for them to be appended to the beginning of existing data.)*

*Example:*
- PDINFULLRPT-20070709 COLLECT-20070701
- PDINFULLRPT-20061114 COLLUPD-20060707 COLLECT-20060618

**PARENTNAME**

Enter parent's name if the user is a minor.

**OPTIONAL1**

Enter your agency code when registering a reciprocal borrower.

**OPTIONAL2**

You are free to use this field as you wish. If you use it, please inform CCS staff of what information is stored there.

**OPTIONAL3**

You are free to use this field as you wish. If you use it, please inform CCS staff of what information is stored there.

**NOTE**

You are free to use this field as you wish. If you use it, please inform CCS staff of what information is stored there.

**NOTIFY_VIA**

Default data is PHONE. EMAIL is dynamically supplied when a user self-registers for EMAIL through the online catalog.
Creating an additional field

To add a new data field to the Addresses tab of a new (or existing) patron record, put the cursor in the field immediately above or below the place where you want the new line to be inserted.

In this example, I want to add a second line labeled STREET to use for apartment, unit, or suite number. To do this I’ll insert a new line after the existing field labeled STREET.

On the appropriate address tab, with the cursor in the STREET field, click on the Insert Row After helper button to add a blank line.

The new field will display below the existing STREET field, but will have nothing in the space where the identifying label displays, and the new field itself will be blank.
Use the dropdown arrow associated with the blank label and select STREET as the new label for this field.

This user’s record now has a second STREET field available to use for the patrons apartment, unit, or suite number.

Click the Modify User or Register User button to save the changes.