Patron Registration Policy

Last updated June 4, 2024

This policy replaces both the Patron Registration policy last updated on February 7, 2019, and the New Patron Policy last updated on November 12, 2020.

For the purposes of RSA policies, the terms Patron, User, and Borrower are interchangeable.

Before registering a new patron, first confirm that they are eligible for an account in your library's service area. Follow issuing library policy in verifying patron address and identity.

Search Workflows to determine whether a prospective patron has an account at a public library in RSA. If the patron already has an account at another public library in RSA, request removal of the user account by submitting a [Reciprocal Deletion Form](#) to notify the former library. Libraries will address reciprocal patron deletions as soon as possible. Review any notes or special statuses (BARRED, BLOCKED, BANNED, PROBLEM, etc.) to ensure that any outstanding issues have been resolved.

- Any **bills** other than overdue fines **must be paid** before a new account may be created, and payment **for lost items** must be sent to the billing library. They may also pay through RSAcat (ProPay) or through the RSAcat Mobile App. If accepting payment for a lost or damaged item, pay the bill in Workflows but do not discharge the item. See [Notification and Billing Policy for Transited](#) [RSA Member Library Items](#) for more payment instructions.

- If a patron owes **overdue fines** but is otherwise in **Good Standing*** as defined below, the new library may create the new account. The former library will remove these fines when they process the Reciprocal Deletion Form.

- If a patron owes fines above their former library's block limit (user status **"BLOCKED"**), they must pay these fines before a new card can be issued. Any fines paid at the issuing library may be kept there. They may also pay through RSAcat (ProPay) or through the RSAcat Mobile App.

- If a patron has materials still checked out on the former account, materials must be returned before creating a new account. Materials may be returned to the new library

to be sent back through delivery.

If the patron does not have a previous account and are within your library area, they can be issued a card. To maintain a clean global database for all patron registrations, the following information is **required**:

- legal first and last name, middle name, or middle initial if applicable (Name field is the only attribute required for school libraries)
- date of birth
- address (complete physical and mailing address)
- telephone number (if available)
- email (if available)

Academic, school, and special libraries are exempt from the requirement to enter patron information beyond name fields.

Name standards:
1. CAPS lock must always be on. Example: MCNAIR not McNair.
2. Use of the Title field is optional.
3. No punctuation or spaces should be used, including the apostrophe ('). Example: OBRIEN not O'BRIEN; VANWINKLE not VAN WINKLE (but DO use hyphens (-) in hyphenated names, examples: JONES-SMITH).
4. Use of preferred name field is optional.
5. For names with suffixes, use the suffix field. Example: JR, SR, II.

Address standards:
1. CAPS lock must always be on.
2. Use a hyphen if entering a 9-digit zip code.
3. Spell out numeric street names only when there are duplicate street names within a postal delivery area.
4. Use Postal Service Standard Abbreviations when entering addresses.
5. Do not use punctuation in City/State field. Example: WASHINGTON IL.
6. If a patron has a separate physical and mailing address, enter both and select the appropriate option for primary address.
7. Include area code and hyphens when entering the telephone number. Example: 000-000-0000 not (000)-000-0000.
8. Patrons can receive notifications at multiple email addresses by entering them on the same line, separated by a comma with no space. Example:
   BLAH@GMAIL.COM,BLAHBLAH@YAHOO.COM

*Good Standing shall be defined as a patron who has no outstanding bills for lost items, collection fees, processing fees, fees for damage, or miscellaneous services. To be considered in good standing, fines should be below the patron's former library's block limit. If a patron's status is "OK" or "DELINQUENT," and the only fines they owe are simple

overdue fines, then for the purposes of this policy, they are considered to be in **Good Standing.**

Other considerations:
Patrons may have unfilled holds on their former account. Staff at the new library may be able to assist by placing these holds on the new card.

Patrons who use ADML (Libby) or eRead Illinois (Boundless) may wish to have their previous account merged with their current account to retain holds and checkout history.

New Patron Policy history
Approved by the RSA NFP Users Group on March 7, 2013
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Patron Registration Policy history
Approved by the RSA NFP Users Group on March 1, 2012

Revision approved by the RSA NFP Users Group on September 5, 2013
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