

Adding new patron records

Adding patrons from other SD63 schools – should already have Evergreen accounts

1. Click the *Check out* tab
2. Enter the patron barcode – Student number or for staff (first initial last name in CAPS *ie* JSMITH)
If the barcode doesn't work, please send an email to mnelson@sd63.bc.ca and I can find the correct barcode for the patron
3. A 'Patron/Library Opt-in Confirmation Window' will open asking: Does (patron name) from (former school) consent to having personal information shared with your library?
4. Click *Accept* - **Please do not click 'Accept' if the patron is not part of SD 63. This is an important privacy and confidentiality issue**
5. Click *Edit* in the patron record to update the home library and homeroom code
6. Click *Save*

Creating a new patron record (for patrons who are new to SD63)

1. In the top menu bar, click *Circulation > Register Patron*
2. **Barcode**
 - Student barcode – Student ID # (from MyEd)
 - Staff barcodes– First initial, last name in capital letters (JSMITH)
 - Please include hyphens and apostrophes (*ie* O'BRIEN, SMITH-JONES)

3. **OPAC/ Staff client user name** - It should prepopulate with the barcode
4. Fill out required fields (highlighted in yellow) and others as listed below
First name, last name

Primary ID type -use drop-down menu to select 'other'

Primary ID – Homeroom code

- Students – use homeroom/ division number with library prefix (*ie* BNSD01, BVIK11, BVICL2017-03)
- Staff – use STAFF or TOC (no library prefix necessary)

Secondary ID – students - enter the student number
staff – enter the employee number

Home Library

Main (profile) permission group (use the dropdown menu)

- K12 School Staff – for all non-library staff
- K12 Secondary, K12 Middle, K12 Elementary - students
- K12 Community Borrower – parents and others

Primary ID / Homeroom Codes

NLA – students no longer attending SD63 schools

STAFF – all non-library staff

STAFFNLA – staff no longer attending SD63 schools

TOC – On-call teachers

PRAC – Practicum students

PAR – Parent borrowers

LIB – Library staff

NEW

5. Click the red X in the address field to remove the required fields from the form.
6. Click *Save*