

Registering A Patron

Updated 3/15/2023

The basics:

To avoid creating duplicate records, search by Birth Date

- **Formatting:**
 - ALL CAPS for everything (except Notes & Email Address)
 - NO punctuation in the Address fields
- **Name conventions:**
 - The name must be entered in the Last, First and Middle name fields.
 - Use the Name as it appears on the person's identification—do not use nicknames.
The occasional exception might be if using the real first name would cause major confusion when searching for the user by name. You can also put clarifying information in the extended notes field.
 - Do not use the Preferred name field—it files incorrectly.
 - Use a hyphen for double last names so they file correctly in the displays (Example: GILDERSON-DUWE)
 - Do not use MR, MRS, MS or DR anywhere.
 - JR and SR, etc, goes in the SUFFIX field. Do not use a period.
 - Do not use a period after the middle initial.
 - Do not use any punctuation at all (except hyphens where appropriate).
- **Addresses**
 - Use the [USPS standard abbreviations](https://extranet.winnefox.org/file/2527) (https://extranet.winnefox.org/file/2527) for ST, RD, HWY, etc. IN ALL CAPS.
 - Use APT for "apartment" followed by the number. Do not use "#". Ex: APT 8, STE 4
 - Use PO BOX (not P. O. Box, etc.) IN ALL CAPS
 - Do not put a comma or / between CITY STATE
 - Use the PHONE field of Address 1 for a phone number. If a patron receives phone notifications, they will only be notified at the phone number in the PHONE field of Address 1.
Preferably, the patron should only give one phone number, but if a patron has volunteered a second phone number, and understands that they will not receive notifications at this secondary number, the second number can be entered into the PHONE field of Address 2.
 - Using EML behind the phone number to indicate the user has an email address is optional. Do not put EML in any field except the phone number.
- **ALWAYS fill in the User categories 1 and 2.**
- **ALWAYS fill the Birth Date.**