

# Online Registration

When turned on, it appears in the catalog on the login popup window by default, but it can be put on library websites or other places as well.

It is comprised of two parts: An online form and two verification scripts.

## Part 1: The online form

- The online form is very basic—asks for Name, Address, Phone, Birthdate, PIN, Email, and Library.
- It will only allow users whose zip codes are in our service area to register.
- It will block duplicates based on Name and if Names match, then on Address.
- It generates an automatic barcode with a special User Profile of ONLINEREG.
- This profile is limited to placing 10 holds, is not allowed to check out materials (but can access online materials), cannot renew online, and expires after 30 days.

## Part 2: The verification scripts

- The script verifies that the address entered is a valid address.
- It inserts a Usercat 1. If that patron lives in one of our 5 counties, it inserts Usercat 2 also.
- It produces a list of registered users whose addresses are not found in American FactFinder. This doesn't mean they are invalid—just that FactFinder couldn't find the address as entered.
- There are many valid reasons that FactFinder couldn't find the address as entered. Here are some of the more common reasons:
  - Apartment information format
  - Mis-spelling of street name
  - Spaces or other characters in spots where FactFinder doesn't expect them
- Staff need to go through the list of online registrations that FactFinder couldn't find and determine the reason and fix up the temporary record.

Once the temporary record is in the database, the patron can access Overdrive, most databases, and place holds.

The patron still needs to come into the library and verify their address before they can check out any physical materials. ONLINEREG patrons cannot renew their accounts online.

## Staff Procedures

You will want to modify/customize these for your library's procedures and policies, but here is a bare-bones starter document for what your library's staff will need to learn to do when Online User Registration (OUR) goes live.

When the patron comes in to complete their registration, they should have brought the confirmation email with them. This includes their temp ID. They may bring in their phone with the email on it instead of something printed.

Staff need to:

- Look up the patron by their new temporary card number
- Check for Duplicate cards
- Confirm patron's phone, email, library; UserCats 1,2,3; Birthdate, and any other fields for a new user registration
- Ask if they want to track checkouts (Charge History). If not, set Charge History to NOHISTORY
- Verify identity/proof of address
- Issue a physical card with a normal 13/14-digit barcode
- Any other library-specific procedures for your library.

This is likely to vary by library, but I would suggest that staff give the patron your usual registration form and to tell the patron "You don't need to fill out the address portion again, just fill in the other parts and sign."