Registering the Pay Patron

Paid Users possess valid library cards purchased at a PALS Plus library. However, their borrowing privileges are limited exclusively to the issuing library. This means that Paid Users can only borrow materials from the library where they obtained their card, and not from other libraries within the PALS Plus network.

Current libraries in PALS Plus with "Paid" Library Card Profiles (ex. LIBRARY-PD)

- **Belleville**
- **Caldwell**
- **Cedar Grove**
- **Fairfield**
- **Kearny**
- **Little Falls**

Note: All Paid borrowers are issued cards by the library where they apply.

Requirements of Registration

As most patrons can only have one card in the database. Therefore, if available, the patron may be better served by registering as an Open Borrower, which grants access to all participating libraries in the Open Borrowing program.

The following guidelines apply to the Pay Borrower:

- The Pay Borrower (profile [LIBRARY]-PD) is issued a library card at the library where they apply and has library privileges exclusively at the PALS Plus Library where they are registered.
- They are not permitted to place system-wide holds.
- Card privileges expire annually.

Each library may have its own registration form. Follow the local library practice regarding the use of an on-site or off-site form, or if a registration form is not required. Present the registration form to the patron and ensure all necessary fields are filled out accurately.

The patron must provide standard proofs of identification credentials as required by the issuing library.

As with any new patron, always check the database to make sure the patron doesn't have a card in the system. People sometimes forget that they previously registered for a card. If they are in the system, the previous card should be modified and the record updated.

During the Pay Borrower registration process, it is crucial to use the local -PD profile when creating the borrower record. This ensures respect for other PALS Plus member libraries, their collections, and their respective policies, as these borrowers are not registered with their home library card.

At the conclusion of the registration, produce a receipt of Paid membership payment as needed or requested.

Registration Process

Begin the registration process by clicking on the User Registration wizard.

- Scan the new library card barcode.
- Library should default to the issuing library.
- Change the Profile to [town name] - PD, example CEDARGR-PD
- Click OK.

When registering patrons from Belleville, Caldwell, Cedar Grove, Fairfield, Kearny, and Little Falls, apply the following criteria when completing the registration:

Library: Issuing Library
Profile Name: [Issuing Library]-PD
User Cat 1: 1Passaic
User Cat 2: [Code for local use, ex. NORTHCALD]
User Cat 3: Level of Internet Access
User Cat 4: Gender Identity
Address 1: Home address and Info

When registering patrons from all other libraries, apply the following criteria when completing the registration:

Library: Issuing Library
Profile Name: [Issuing Library]-CO
User Cat 1: 1Passaic
User Cat 2: [PAID]
User Cat 3: Level of Internet Access
User Cat 4: Gender Identity
Address 1: Home address and Info

Basic Info Tab

Enter the patron's information in the Basic Info Tab using both upper and lower case letters (not all caps).

- **Title (Optional)**: If applicable, enter the title without punctuation (e.g., Mr, Mrs).
- **First Name (Required)**: Enter the patron's first name as it appears on their official identification document.
- **Preferred Name (Optional)**: If the patron has a preferred name (e.g., Bob for Robert), enter it here.
- **Middle Name/Initial (Optional)**: Enter the middle name or initial of the patron.
- **Group ID (optional)**: The Group ID field is used to link members of a named group, such as a department or a family.
- **Library (Required)** - The Library field should automatically default to your library.
- **Profile Name (Required)** - The Profile Name field should carry over the value entered during the New User Registration process.

Always use the Duplicate User button to check the database for duplicate records. Even if the patron claims to have never had a library card, be cautious of potential nicknames, misspellings, or duplicate names.

Privilege Tab

- **Privilege Expiration (Required) –** The Privilege Expiration should automatically assign the expiration date based on the user's profile.
- **PIN (Required) -** The PIN field is necessary for patrons using Envisionware or the online catalog. Consult your library's policy to determine the PIN format. It may be the last four digits of the patron's phone number, card number, or an automatically assigned number. Set the PIN and remember that an override code will be needed to change the assigned PIN.
- **Status (Required):** The default setting for new users is "OK."

Demographics Tab

- **User Cat 1 (Required)** - The User Cat 1 field should always indicate "1 Passaic" for regular PALS Plus patrons.
- **User Cat 2 (Required)** - Choose your town.
- **User Cat 3 (Required) –** User Cat 3 is necessary for patrons to use the internet. Follow your library's policy for filtering levels used and enter appropriate level.
- **User Cat 4 (Optional)** - Optional field to indicate the patron's gender as Male or Female.
- **Birth Year (Optional)** - Use this field to indicate the patron's year of birth, primarily for minors. It may not be required in all libraries.

Addresses Tab

- Fill in the street address, including apartment numbers or any relevant details
    - Use proper standardized abbreviations when typing addresses, such as Ave. for Avenue, Rd. for Road, and St. for Street.
    - Numerical street names should reflect the actual number, such as 22nd St.
- Provide the city/state and zip code.
- Enter the patron's phone number and email address.
- Use Address 2 and Address 3 for secondary addresses, if applicable.
- The system will use the primary address when sending overdue notices or bills.
- If the primary address is a P.O. Box number, ensure the patron's actual residential address appears in the Address 2 field.

Extended Information

The Extended Information tab provides additional text fields for capturing supplementary user details. This section includes Notes and Comments fields, which serve as valuable resources for storing additional information about the user. In Workflows, only staff members can view both notes and comments.

- **Guardian and birth date**: The Guardian and Birth Date fields are specifically designed for minors. Depending on your home library's requirements, these fields may be mandatory to gather information about the guardian or parent and the minor's birth date.

- **Notes**: Use this field to record any relevant details or special considerations regarding the user. It is important to maintain professionalism when entering notes. Always initial, date, and indicate the library that entered the note to ensure accountability and accuracy.
- **Comments**: Similar to the Notes field, the Comments field allows staff members to add specific remarks or observations about the user. Ensure that comments remain professional in nature and are entered with the same diligence as notes.

SMS Notice Contact Info Tab: (Optional)

The SMS Notice Contact Info tab is used for patrons who wish to receive notifications via text message (SMS).

- **Label Field**: In the label field, enter "Mobile" to indicate the contact number for mobile phone notifications.
- **Country**: Should default to the United States.
- **Phone Number**: Enter the 9-digit phone number without any spaces or dashes.
- Check all appropriate boxes to specify the types of messages the patron wishes to receive.