Registering the Open Borrowing Patron

Open Borrowing is a reciprocal borrowing program for library patrons to borrow in-person from among more than 75 public libraries in northern New Jersey, including all the public libraries in PALS Plus. These instructions outline the general best practices for registering Open Borrowing patrons. It is important to note that local policies may vary, so it is essential to adhere to your library's specific guidelines.

Required Documentation

When applying for Open Borrowing privileges, patrons must present their current library card from their home library. If they do not have a card from their home library, they must obtain one before they can be registered for Open Borrowing.

Verify that the patron is from a library that participates in Open Borrowing. As a general rule, patrons from the following library consortia or county libraries are eligible:

- LMxAC - Libraries of Middlesex Automation Consortium
- MAIN Library Alliance
- SWELL - Sussex and Warren Counties

See www.openborrowing.org for a complete list of participating libraries.

Registration Process

Verify with their home library that the patron is in good standing.

- Call the patron's home library, or
- As the user to log into their online library account

Be sure to confirm the name and card number as part of the verification process. If the patron is in good standing, you may proceed to register the patron as an Open Borrower.

The patron will need to provide a photo ID and proof of residence. Additionally, the patron may be required to complete an application if required by the local library.

Check the database to make sure the patron does not already have a card in the system. If the patron is already in the system, modify the existing record (update their record using the instructions beginning in the Basic Info Tab category). If the patron is not in the database, begin with:

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

- Scan the new library card barcode.
- Library should default to your local library.
- The profile should default to the regular adult profile for your library.
- Click OK.

Basic Info Tab

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

- **User ID (Required)**: Scan or manually enter the barcode from n the patron's home library card.
- **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)** - Select 1RB or 1RB-J for the Profile Name.

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) -** 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 indicate the Issuing Library (based on the missing library of the user's library card, not the home address)
- **User Cat 2 (Required)** - Choose either the patron's hometown library or library system if their hometown library is not listed. The only exception is WPU for William Paterson University patrons.
- **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 the 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.

Once the patron has been registered, they are eligible to use all PALS Plus Libraries except PCCC and WPU (the Open Borrowing Program is for public libraries only). Advise Patron that their PALS Plus items must be returned to a PALS Plus Library in order to be removed from their record. Failure to do so can result in late charges as items cannot be discharged elsewhere.