

Requirements for Merlin patron entry

- Before issuing a new patron card, check for an existing record for the patron. Be sure to look for similar names or name variations. If a match is found, verify using birthday or other identifying information. Do not issue a new card to a patron already in the Merlin database. If necessary, offer a replacement card by replacing the barcode number in the exiting patron record. If no record is found for the patron, proceed with creating a new record.
- Verify identity and type **Y** in the **ID Verified?** field.
Do not include an ID number in the Merlin record.
- Verify residency/property ownership. If the patron claims a different address than the one shown on his/her state-issued ID card, use the Wisconsin Proof of Residence for Voter Registration (elections.wi.gov/publications/voter-guides/proof-of-residence) guide to documentation for determining residence. Local property ownership may also be verified with local tax roll information or county GIS websites. Enter the appropriate codes in the **COUNTY** and **TOWNSHIP** fixed fields.
- Enter data in the following fields for a complete record:
 - **BIRTHDATE**: mm-dd-yyyy
 - **b P BARCODE**: scan new barcode
 - **n PATRN NAME**: Lastname, Firstname Middlename Suffix
Do not use initials or nicknames, and do not include hyphens or other special characters.
 - **EXP DATE**: MM-DD-YYYY
Enter a date one year from registration or following your library's policies.
 - **PATRON STAT**
 - **COUNTY**
 - **TOWNSHIP**
 - **PATRONTP**
 - **HOME LIBR**
 - **a MAIL ADDR**
 - **e RESP PARTY**
 - Use for cards issued to children or adults with a legal guardian or caregiver.
 - Enter the responsible party's address in the **f RESP ADDR** field if different than the patron's mailing address.
 - **t MAIN PHONE**
 - **z EMAIL**
- When renewing a patron card, verify the patron's contact information and update the local government code and county code if necessary.

Best practices for card registration

- Adopt a written policy for patron eligibility and card registration.
- If your library uses an application form:
 - Include a checkbox to indicate that library staff checked identity and residency/property ownership.
 - Require a signature from the patron registering and the responsible party, if applicable.
 - Consider data security when choosing to retain ID numbers. Store the forms in a secure location.
- If practical, develop a workflow that double-checks patron data entered in Merlin before registration forms are destroyed.