

# Merging Patrons in Evergreen

04.06.10, chb

## Overview

This process will merge two or more patron records together into one record. It will retain all patron information, patron fines, and patron checkouts. It will also allow all merged patron ID numbers (library card numbers) to continue to be active. The patron ID number (library card number) for the lead account will not void the other patron ID numbers, but rather is the one displayed within the record.

## Procedure

1. Acquire lists of duplicate patrons via an Evergreen report or by contacting a member of the NTLC Reports committee.
2. Select Search for Patrons from the Evergreen menu and enter the patron's last name and first name in the appropriate text entry boxes.
3. Verify that the patrons retrieved are indeed duplicate patrons.
4. If they are duplicate patrons, shift click to select the patrons and click the Merge Patrons button. See Example A: Patron Search Screen below.

The screenshot shows a web browser window with the URL `1: decatdirector@Decatur-director.catalog.northtexaslibraries.org`. The page title is "1 Patron Search". The main content area is titled "PATRON, JOE" and features a "Merge Patrons" button circled in red. Below the title is a table with columns: Active, Barred, Birth Date, Family Name, First Name, Home Library (Full Name), and Middle Name. The table contains two rows of data:

Active	Barred	Birth Date	Family Name	First Name	Home Library (Full Name)	Middle Name
Yes	No	1980-01-01	PATRON	JOE	Decatur Public Library	
Yes	No	1972-04-04	PATRON	JOE	Decatur Public Library	

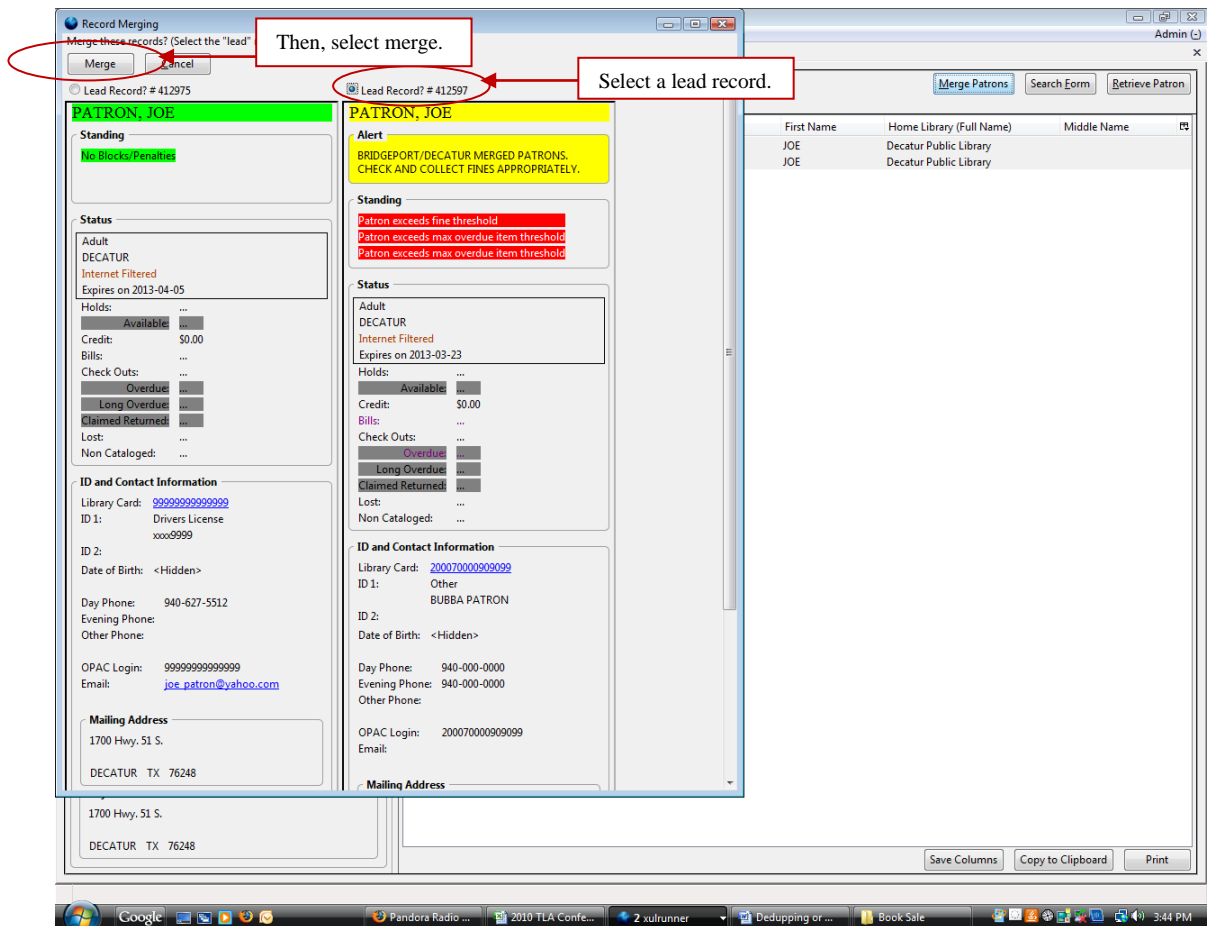
On the left side of the screen, there are several sections of information for the patron:

- Standing:** No Blocks/Penalties
- Status:** Adult, DECATUR, Internet Filtered, Expires on 2013-04-05. Holds: Available 0, Credit: \$0.00, Bills: \$0.00, Check Outs: 0, Overdue 0, Long Overdue 0, Claimed Returned 0, Lost: 0, Non Cataloged: 0.
- ID and Contact Information:** Library Card: 9999999999999999, ID 1: Drivers License xxx09999, ID 2: Date of Birth: <Hidden>, Day Phone: 940-627-5512, Evening Phone: , Other Phone: , OPAC Login: 9999999999999999, Email: joe\_patron@yahoo.com
- Mailing Address:** 1700 Hwy. 51 S., DECATUR TX 76248
- Physical Address:** 1700 Hwy. 51 S., DECATUR TX 76248

At the bottom of the screen, there are buttons for "Save Columns", "Copy to Clipboard", and "Print". The Windows taskbar at the bottom shows the time as 3:34 PM.

Example A: Patron Search Screen

5. Select a record to be the lead record and click on Merge. It is preferable that you use the most complete and accurate record. See Example B: Merge Screen on the next page.



Example B: Merge Screen

6. Enter the merged record and select Edit>3. Addresses. Delete the duplicate addresses created by the merge, if appropriate.
7. Clean up remaining fields within the patron record as needed, standardizing entry and removing inaccurate or incomplete information.
8. Select 4. Groups and Permissions and add the following note to the Alert box, "BRIDGEPORT/DECATUR MERGED PATRONS. CHECK AND COLLECT FINES APPROPRIATELY."
9. Select Finish.
10. Select Save User.