

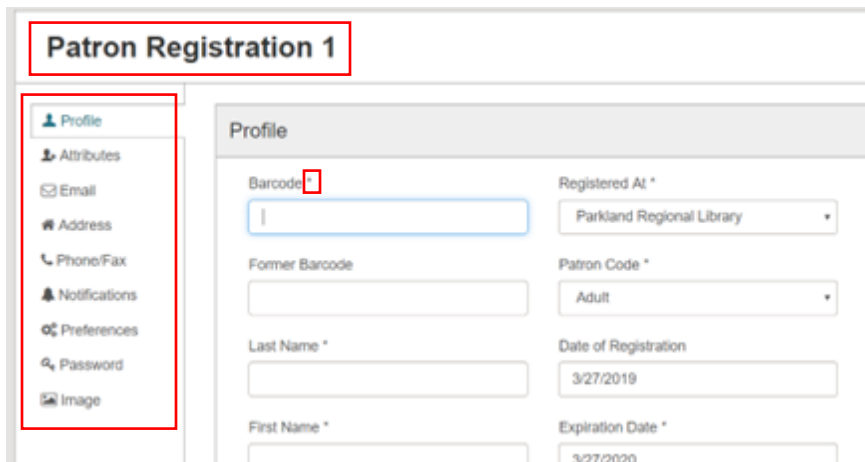
Patron Registration

To create a patron registration, first, ensure that **no patron record already exists** for that patron. To do this, type the full name of the patron into the quick search bar.

1. Click on the **new patron** button located under the quick search bar.



2. This opens the patron registration work form. All content for the patron registration form is on one page. On the left is a **dashboard** indicating the section of the work form.


 A screenshot of a web form titled "Patron Registration 1". On the left is a vertical dashboard menu with icons and labels: Profile, Attributes, Email, Address, Phone/Fax, Notifications, Preferences, Password, and Image. The "Profile" section is highlighted with a red box. The main form area is titled "Profile" and contains several input fields and dropdown menus. Fields with asterisks (*) are required. A red box highlights the "Barcode" field.

Profile	
Barcode *	Registered At *
<input type="text"/>	Parkland Regional Library
Former Barcode	Patron Code *
<input type="text"/>	Adult
Last Name *	Date of Registration
<input type="text"/>	3/27/2019
First Name *	Expiration Date *
<input type="text"/>	3/27/2020

3. Required fields are indicated by the **asterisks**. You will be unable to save the patron if any of these fields are left blank. It is best practice to fill out other fields in addition to the required fields, such as email and phone number.
 - a. **Profile:** you are required to enter the barcode, last name and first name in normal title case, registration library, patron code (most commonly used are Adult, Junior, and print disabled), and statistical class to identify their county or community.
 - b. **Attributes:** no required fields.
 - c. **Email:** no required fields but strongly suggested for notifications, eResources, and promotional reasons.
 - d. **Address:** start with the postal code, with a space, and the other required fields will generate appropriate information. Polaris references Canada post and thus



contains all correct postal codes. You can add a second address by clicking **address**.

- e. **Phone/fax:** no required fields but strongly suggested for notification reasons.
 - f. **Notification settings:** the default setting is email, but can be changed by clicking the field and selecting the preferred notification options. If you select **Text message** as Notification Option and/or **additional TXT notice** you must select the appropriate phone and add a wireless carrier.
 - g. **Preferences:** to exclude a patron from notifications select appropriate boxes. This will ensure your patron does NOT receive those notices. You may also check **maintain reading history**.
 - h. **Password:** is required to access the public access catalog. This is typically defaulted to the last four digits of the phone number.
4. When you have completed the registration form click **save**.