

# Plastic Cards – Procedures

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We are phasing out the tri-fold TRAC/TAL card. In its place, patrons will receive a durable, plastic TRAC card. Please provide these new cards to patrons when completing new memberships or renewing memberships. This card gives patrons access to the collections of over 170 TRAC libraries through TRACpac.

If you have any questions about the following information, **please contact your library consultant.**

## Registration Checklist

Before updating an **existing** patron to a plastic card, please ask the following questions:

**1) Do you use the Hoopla, 3M Cloud Library, or Overdrive to download items?**

- If the patron uses **Hoopla**, they must change their barcode in Hoopla (see instructions in the eResources section on page 3)
- If the patron uses **3M Cloud Library**, changing barcodes will cause them to **irreversibly lose** their downloaded items, wish lists, and reading history. Ensure they are aware of this before you change their barcode.
- If the patron uses **Overdrive**, we are able to transfer their account so they can retain their reading history if they so choose (see instructions in eResources section on page 3)

**2) Have you registered your library card for ME Libraries?**

- If the patron answers “yes”, see the instructions in the eResources section on page 3 to update their information

Once you have completed this checklist, if the patron still wishes to upgrade to a new plastic card, follow the steps on the next page to change the information in Polaris.

## Giving existing patrons a new card

Follow these steps when upgrading existing patrons to a new plastic card:

- 1) Open the existing patron record (General view). **Do not create a new patron record.**
- 2) Copy the old barcode into the *Former barcode* field.
- 3) Delete the old barcode in the *Barcode* field and scan in the new barcode.
- 4) Save the patron record.

Patron Registration - 213491 - General - Polaris

File Edit View Links Tools Help

Registration

Barcode: 29335002093927

Registered at: Yellowhead Regional Library (ASGY)

Patron code: Family

Last name: Reacher

First name: Jack

Middle name: YRL TEST

Title: Suffix:

Expiration: Term: 0 Date: 17/02/2015

General

Gender:  Male  Female  N/A

Statistical class: (None)

Password: \*\*\*\*

Language: English

Former barcode: 2933000585599

Birth date:

Date of original registration:  22/06/2009

Last activity date: 02/10/2014 4:23:01 PM

Exclude from collection agency  Maintain reading list

Exclude from overdue notice  E-mail notices in plain text

Exclude from hold notice  Do not delete patron record

Exclude from billing

User defined fields

Where They Live: Spruce Grove - City

Parent/Guardian (LastName, FirstName)

Local Library Statistic #1: YRL Test patron

Local Library Statistic #2: (none)

Local Library Statistic #3:

For Help, press F1

## Issuing a TAL card to TRAC patrons

Plastic cards will no longer be combined TRAC/TAL cards. **Patrons using plastic cards will require a separate cardboard TAL card** if they wish to visit university, college or special libraries in person. Note: Patrons may continue using their old TRAC/TAL card as a TAL card if they wish (e.g. if they have collected numerous TAL barcodes). To issue a TAL card:

- 1) Please fill out the information on the card, including the patron name, your library name and their expiry date from their TRAC account.
- 2) Have the patron sign the card.
- 3) Do not put a barcode on the card – patrons visiting post-secondary libraries will take their blank cards and collect barcodes from libraries they visit in order to borrow items.

## How eResources are affected

### OverDrive

Giving a patron a new barcode effectively creates a new account in OverDrive. Patrons will lose all account activity (holds, checked out items, saved wishlists, and their reading history). If the patron wishes to maintain this activity, please follow these steps:

1. Note the patron's old barcode and new barcode. Create a spreadsheet or list if you have multiple accounts to change.
2. Email the old and new barcodes to [jayles@peacelibrarysystem.ab.ca](mailto:jayles@peacelibrarysystem.ab.ca), using the subject line "Merge Patron Accounts."
3. Peace Library System will take the request and have the activity from the old account merged to the new account. You will be contacted when completed.

**Note:** *Merging accounts is not necessary for patrons not using Overdrive or those with no information they wish to retain.*

### Hoopla

After receiving their new barcode, the patron will need to change the barcode in their Settings.

1. Log in to hoopla with email address and password.
2. Click on your email address in the top right corner of the page.
3. Under Library Information, change your library card number and click the Update button to save.

### 3M Cloud Library

At present, 3M Cloud Library does not have the ability to merge patron activity. Therefore, switching patron barcodes will cause patrons to **irreversibly lose** their titles downloaded, reading history or hold and wish lists.

### ME Libraries

Patrons who have registered for ME Libraries using their old barcode must re-register using their new barcode on **melibraries.ca**. Alternatively, patrons may travel to ME Library locations in person and request their information be updated.

If a patron has holds in ME Library locations (e.g., Edmonton Public Library) they should **not** dispose of their old card until all of their ME Library holds have been canceled and/or picked up. Until then, patrons will use their old card at ME Library locations.