P Type Project Record Review

Getting to your list

1. **In Sierra open Create List from Function Menu**
2. **Navigate to your assigned review file – Double click to open**

Review Fields:
The order below is set to facilitate having verified the address before assigning new P Type or Town Code.

1. Card Expire

   What does it do?: the date that the account is expired. Blocks circulation transactions (holds, checkouts, renewals) It is a required field.
   Review Process: Check the date

   - Date is not expired or expired within 3 years

     Action: None

   - Date is more than 3 years earlier than today
     - And **CUR CHECKOUT = 0**
     - And **MONEY OWED = 0**
     - And **CIRCACTIVE** more than 6 months ago

     Action: The record can be deleted

2. PATRON NAME
   What does it do?
   Identifies the patron, displays in notices, Discover and Patron Mobile APP.
   Note: If the patron prefers to be called by something other than their legal name, use the Legal name field to document their legal name and the Patron Name field to document their preferred name.
   Format Guide
   - The name format is: **Last, First Middle** or **Last, First Middle Initial**
   - The comma is required after the first name, followed by a single space
   - Acceptable punctuation includes
     - Hyphenated names (only a hyphen/no additional spacing)
     - Names that include apostrophes
     - Emojis and other decorations shall not be used, as the cannot be indexed and disrupt formatted exports.

Review Process:

- The field should begin with the first letter of the last name – remove and spaces that may exist or punctuation
- Remove any elements in the name field that are not **Last, First Middle** Like Dr., Junior, Sir, Mr, - these additional items create index problems.
- Delete any "other" data stored in additional name fields. Check with your director if you think there is a true purpose.

3. Address Fields: Mailing Address / Street Address

What do they do?

a) Mailing Address: Documents the patron's mailing address. It is used to send notices to the patron and displays in the Sierra patron record.
Mailing Address is a required field.
Note: a second **Mailing Address** field may be added if an alternative mailing address is necessary to reach the patron at a later date or as an alternate. The primary must be moved to the top of the field group (Select the field and right click)

b) Street Address: Used to document the patrons residential address if different than the mailing address. It is used to identify the patron's **P TYPE** and **TOWN CODE.** State education law determines which library serves a patron based on residency.
Street Address is a required field *ONLY IF* it is different from the Mailing Address.

Review Process:

- Ensure that the mailing address is in the correct field (**Mailing Address)**
- If a residential Address is required, make sure that it is entered in the correct field (**Street Address).**

Postal format review:

- Review to catch any misspellings
- Check for Proper postal abbreviations (See the postal resource)
- Remove all punctuation except the hyphen between Zip and Zip code extension digits (there should be no spaces, only the hyphen)
- Delivery Address is a single line, with any secondary designations following the street address. EX: 123 Main ST APT 2B
- The last Line of the address should be formatted without commas and an abbreviated state EX: Poughkeepsie NY 12601