

# NC Cardinal Multiple Library Card Policy and Procedure

April 2015



## Policy

It is the policy of the NC Cardinal consortium that all member libraries honor the library cards of all other member libraries, allowing patrons the fullest access to NC Cardinal consortium materials. Because the consortium does not currently share electronic resources consortium-wide, patrons may maintain library accounts in more than one member system in the consortium based upon the established patron registration policy for each library system. If a patron requests a new library card or wishes to use their existing library card in another NC Cardinal library, please follow these recommended procedures.

## Procedures

When a patron requests a library card, staff should:

SEARCH the NC Cardinal consortium database for patrons with the matching name and other identifiers. The scope of the patron search MUST be set to NC CARDINAL.

1. Does the patron have an existing account in NC Cardinal database?
  - a. Yes - go to question 2
  - b. No - Use patron registration to create NEW patron account following your library's local patron registration policies.
  
2. Does the patron owe money to ANY NC Cardinal library?
  - a. Yes - go to question 3
  - b. No - go to question 5
  
3. Is the patron account above the fine limit (purple box around name) or sent to collections?
  - a. Yes - NO checkout or NEW card. Patron MUST pay bills before proceeding. Patrons in collections must resolve with library system owed.
  - b. No - go to question 4
  
4. Is patron paying off ALL fines?
  - a. Yes - go to question 5
  - b. No - Use patron's card AS IS. Do NOT change patron's Home Library or Permission Group. If patron's existing card is expired with no fines, verify/update contact info & extend expiration date for a week. Do NOT use Update Expire Date button.
  
5. Does the patron wish to check out with the existing NC Cardinal card?
  - a. Yes - Use patron's card AS IS. Do NOT change patron's Home Library or Permission Group. If patron's existing card is expired with no fines, verify/update contact info & extend expiration date for a week. Do NOT use Update Expire Date button.
  - b. No - go to question 6
  
6. Does the patron want to get a NEW local card and keep their existing card?
  - a. Yes - Use patron registration to create NEW patron account following your library's local patron registration policies. Patron's other library account(s) remain in the database as is. Do NOT merge accounts into one.
  - b. No - Replace barcode in existing account with barcode of new card for your library. Update patron info, including Home Library and Permission Group to your library system.