

Evergreen Patrons



Who Gets A Library Card?

- Anyone who lives, works, goes to school, or owns property in Westchester County is eligible for a library card.
- There are no official age restrictions for patrons, it is simply up to the individual libraries to decide the earliest age for patrons to sign up for a card.
- Use the [Library Service Area Viewer](#) to determine the correct library location for patrons wishing to sign up for a card.
- Patrons are only permitted to have ONE card registered to them.

Who Gets A Library Card? What about Staff?

#	<input type="checkbox"/>	Home Library	Last Name	First Name	Daytime Phone	Card	Profile	Privilege Expiration Date
1	<input type="checkbox"/>	WLS	Pryor	Allison	914674-████	apryor	Global Administrator	6/26/2033 12:21 PM
2	<input type="checkbox"/>	WLS	PRYOR	ALLISON	914231-████	210383000-████35	STAFF	6/16/2025 2:13 PM
3	<input type="checkbox"/>	YRK	PRYOR	ALLISON	914231-████	210383000-████39	ADULT	9/23/2027 3:59 PM

Library staff can have a personal library card for their home library, and a staff card* for the library that they work at.

If you were to look yourself up in Patron Search, you may find two to three entries listed. Take a look at the Card and Profile columns to see what kind of cards you may have. Clicking on the barcode will take you to the account page.

**Staff that work at multiple libraries are only permitted the one staff card.*

Who Gets A Library Card? What about Staff?

Booking - Administration - apryor @ WLS-WLS-pryor

Check Out Items Out Holds Bills Notes Edit Other - Patron Search

Pryor First Name Middle Name Name Keywords Search

Patron Search Results Add To Bucket Merge Patrons Rows 100 Page 1

#	Home Library	Last Name	First Name	Daytime Phone	Card	Profile	Privilege Expiration Date
1	WLS	Pryor	Allison	914674	apryor	Global Administrator	6/26/2033 12:21 PM

If you see a firstname.lastname formatted barcode, this is merely your Evergreen username and is not an actual user profile.

- Do **NOT** use this profile for any workflows.

Out-of-County Library Cards

Patrons who do NOT live, work, attend school, or own property within Westchester County may obtain an Out of County card for an annual fee through the Westchester Library System.

Do NOT renew records with a profile as FEE. View the [Get a Library Card](#) page on the WLS website (www.westchesterlibraries.org/Get-a-library-card) and download the form. Contact Allison Pryor at WLS for more information.

Patron Profiles

Patron profiles are assigned at registration but can be updated, as necessary. Profiles determine how a patron's account interacts with the ILS in ways such as:

- When the account will expire.
- How many items they can check out.
- How many holds they can place.
- The maximum number of fines they accrue.

Patron Profiles

Patron Profile	Expires	Hold limit*	Bill Threshold	Check-outs	Total check-outs	Over-dues
Adult	3 yrs	35	\$25	75		75
Adult-New	3 weeks	35	\$25	3	3	3
Juvenile*	3 yrs	35	\$25	75		75
Juv-New	3 weeks	35	\$25	3	3	3
Senior	3 yrs	35	\$50	75		75
Staff	3 yrs	35	none	75		Fine Free
Teen**	3 yrs	35	\$25	75		75
Teen-New	3 weeks	35	\$25	3	3	3
Contract1	12-31-xx	35	\$25	75		75
Contract3	3 yrs	35	\$25	75		75
Courtesy	3 yrs	35	none	75		Fine Free
Fee	1 yr	35	\$25	75		75
Guest	3 mos	3	\$25	3	3	3
Temp	1 month	3	\$25	3	3	3
Internet Only	1 yr	0	none	0	0	0
PC Use	2 weeks	0	none	0	0	0
HOMEBOUND	3 yrs	35	none	75		Fine Free
PIE	6 mos	0	\$25	3	3	3

*(PLDA voted to increase hold threshold from 25 hold requests to 35 hold requests on 4/8/25.)

Patron Profiles

- *Juvenile is below 12 years old.
- **Teen is between 12 and 18 years old.

Explanation: Optional for libraries to use:

- Guest – used either for a shelter or transient patron
- PC Use – a 2 week privilege, used for a visitor not otherwise eligible for a library card in Westchester.

Register a Patron

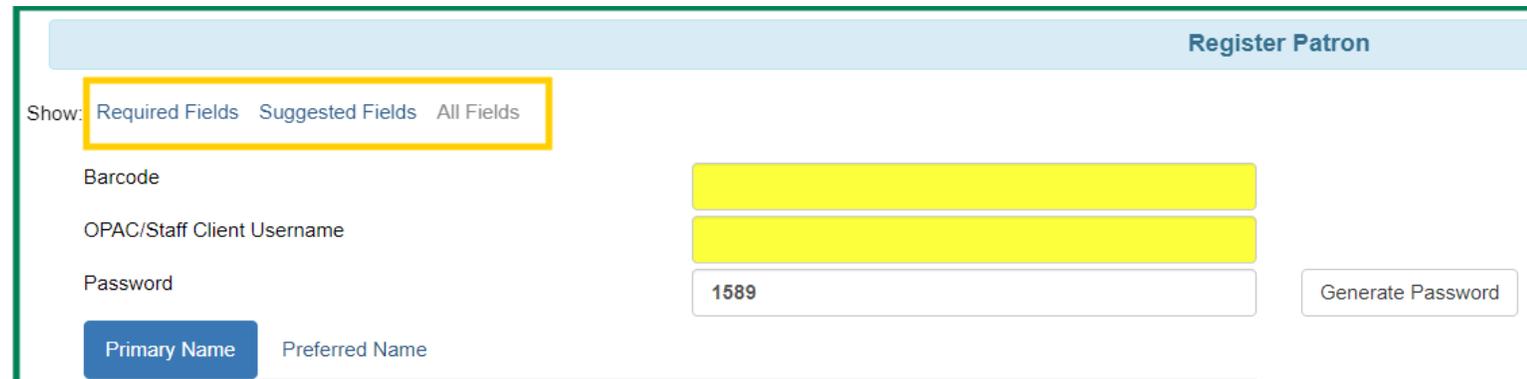
Before registering a patron, use Patron Search to verify that they DON'T have an existing card at a WLS library.

- Determine the patron's home library by identification that includes proof of residence (Ex: license, lease agreement, utility bill, etc.)
- Use the [Library Service Viewer Tool](#) to help locate their home library if you're unsure.

Register a Patron

There are three ways to fill out the Patron Registration Form depending on which information your library likes to collect.

- Required Fields
- Suggested Fields
- All Fields



The screenshot shows the 'Register Patron' form interface. At the top, there is a light blue header with the text 'Register Patron'. Below the header, there is a 'Show:' dropdown menu with three options: 'Required Fields', 'Suggested Fields', and 'All Fields'. The 'Required Fields' option is highlighted with a yellow border. Below the dropdown, there are three input fields: 'Barcode', 'OPAC/Staff Client Username', and 'Password'. The 'Barcode' and 'OPAC/Staff Client Username' fields are highlighted in yellow. The 'Password' field contains the text '1589' and has a 'Generate Password' button to its right. At the bottom of the form, there are two buttons: 'Primary Name' and 'Preferred Name'.

All required fields are highlighted in **yellow**. Evergreen is also actively checking for duplicate patrons in the system that match any of the information you're inputting.

Register a Patron

When registering a patron, best practice is to **always**:

- Verify they do NOT already have an existing account.
- They are signing up at the correct library.
- USE ALL CAPS WHEN FILLING OUT THE PATRON'S NAME.
- Input the patron's daytime phone number. The last four digits will automatically be copied into the PIN field.
- Ask them if they prefer emailed receipts.
- Verify they have a valid email address. If they do NOT want to provide an email address, deselect it from the Notification Preferences.
- Phone numbers should be entered in a continuous numerical string. I.e., 9141234567

Register a Patron: Patron Preferences

Patrons can have staff set their preferences for things like

- Email checkout receipts by default?
- Default Hold Pickup Location
- How they receive their Holds Notices
- And if they Allow others to use their account

The screenshot shows a web form for setting patron preferences. A yellow box highlights the top section, and a green box highlights the bottom section. Yellow arrows point from the text on the left to specific fields in the form.

Email checkout receipts by default?	<input checked="" type="checkbox"/>	
Daytime Phone	914231:	Invalidate Example: 5551234567
Evening Phone		
Other Phone		
Home Library	WLS	
Main (Profile) Permission Group	STAFF	Secondary Groups
Privilege Expiration Date	06/16/2025	Update Expire Date
Internet Access Level	Unfiltered	
Active	<input checked="" type="checkbox"/>	
Barred	<input type="checkbox"/>	
Is Group Lead Account	<input type="checkbox"/>	
Claims-returned Count	0	
Claims Never Checked Out Count	0	

User Settings	
Default Phone Number	
Default Hold Pickup Location	WLS Clear Default Pickup Location
Hold is behind Circ Desk	<input type="checkbox"/>
Collection Exempt	<input type="checkbox"/>
Holds Notices	<input type="checkbox"/> Phone <input checked="" type="checkbox"/> Email <input type="checkbox"/> SMS
Default SMS/Text Number	914552 -- Send Test Text
Default SMS Carrier	Verizon Wireless (USA)
Allow others to use my account	Chester West <input checked="" type="checkbox"/> Place Holds? <input checked="" type="checkbox"/> Pick Up Holds? <input type="checkbox"/> Obtain Circulation Information? <input checked="" type="checkbox"/> Check Out Items?
Add Person	

Register a Patron: Temporary Cards

A patron registering at a library other than their “home” library should be issued a “TEMP” account. When issuing a temporary card:

- Check ID. Ask for mail with a street address. (Post office boxes may be necessary information for mailing purposes but aren’t sufficient as proof of residency.)
- Search for an existing record before registering the patron.
- Au pairs, nannies, teachers, students, or others should show proof of employment or school status.
- If a patron doesn’t have ID, recommend that they apply online, preferably on their home library’s website.

The TEMP card information **must** be sent (faxed, scanned and emailed, etc.) to the home library for the patron to gain permanent status.

Register a Patron: Temporary Cards

Register the patron as usual ***except:***

- Enter a temporary number. Suggested entry schemas:
 - LibraryCodeTEMPDate: WLSTEMP20240924
 - LibraryCodeTEMPDateNumberOfFirstTempCardThatDay: WLSTEMP202409240001
 - A regular library card barcode from your library that is **NOT** physically given to the patron.
- Change the Library code to what ***should*** be the patron's home library.
- Change the Profile to TEMP.
- Check out the items on the temporary card. Do not give the patron a physical card. **Optional:** Tell or give the patron their card number and PIN for temporary use.
- Fax or send a copy of the registration information to the home library, *Attention — Circulation Desk*. If unsure of the home library, call the probable library to verify.

Register a Patron: Temporary Cards

When you receive information for a temporary card:

- Replace the temporary barcode with a new/actual barcode from your library.
- Double-check the record for accuracy.
- Change Profile from TEMP to the appropriate profile.
- Save the new information.

The patron's home library will dictate how the patron receives their card — in the mail or in person. Best practice is to mail the permanent card to serve as another address verification and make the patron happy!

Duplicate Patrons: To Merge or Not To Merge

If a patron has two cards, **do not** delete either card. Instead, merge them!

- Go to Patron Search and search for the patron by name. Both accounts will display in the list.
- Select both accounts. Once selected, the blue **Merge Patrons** button will display. Click on it.
- A screen will open with both accounts displayed in two columns. Review the information for both accounts. Whichever one has the current card information, at the top of the card, click the option “**Use as lead.**”
- Scroll to the bottom of the screen and click on the **Merge Patrons** button in the bottom right corner.
- The two cards will be merged with the history of both on the new lead card.

Patron Search Results

Add To Bucket ▾ Merge Patrons

⏪ ⏩ Rows 100 ▾ Page 1 ▾ ⚙

#	<input type="checkbox"/>	Home Library	Last Name	First Name	Daytime Phone	Card	Profile	Privilege Expiration Date
1	<input checked="" type="checkbox"/>	HHF	SMITH	ADAM	9143864████	210163003:████	TEEN	8/23/2027 4:25 PM
2	<input checked="" type="checkbox"/>	HHF	SMITH	ADAM	9148040████	210163003:████	ADULT	11/9/2024 4:02 PM

Duplicate Patrons: To Merge or Not To Merge

Make sure you are merging the correct profiles.

Merging Cards is **PERMANENT** and **CANNOT** be reversed!

Merge patrons?

Use as lead Use as lead

Profile	TEEN	Profile	ADULT
ID	525 [REDACTED]	ID	5309 [REDACTED]
Name	SMITH, ADAM	Name	SMITH, ADAM
Home Library	HHF	Home Library	HHF
Net Access	Unfiltered	Net Access	Unfiltered
Date of Birth	[REDACTED]	Date of Birth	[REDACTED]
Parent/Guardian		Parent/Guardian	
Last Activity		Last Activity	08/16/2022
Last Updated	08/23/2024	Last Updated	11/09/2021
Create Date	09/17/2021	Create Date	11/09/2021
Expire Date	08/23/2027	Expire Date	11/09/2024

Patron Thresh- holds

Depending on the Patron's profile, thresholds can be met when a patron exceeds:

- \$25.00 or more in fines.
- 35* or more holds.
- 75 or more checkouts.

When thresholds are met, a block may be applied to a card.

*PLDA voted to increase hold threshold from 25 hold requests to 35 hold requests on 4/8/25.)

Patron Blocks

Blocks are often system-generated on patron accounts. Typically, they happen when a patrons exceeds a threshold, but they can be added manually by staff. A notice appears when a staff person tries to checkout an item to blocked patrons.

System-generated blocks will still allow patrons to place holds, but whatever caused the block will need to be addressed at check-out.

To apply a block, open the Notes tab within the patron's profile. Select Block and add a message to explain the blocking alert. Be sure to include your initials and 3-letter library code.

Create or Edit Note

Note Alert **Block**

Penalty Type: Alerting block on Circ, Hold and I Depth: Everywhere

Location: WEST

Patron Visible Unread

Patron has reached check-out thresh hold. (WLS - AP - 9/20/2024)

Note Text...

OK Cancel

Barred Patrons

Have you wondered what the difference between barred and blocked is?

Barring patrons will stop them from using their library cards and alerts the staff that the patron is banned/ barred from the library. The “check-out” functionality is disabled for barred patrons (There is **NO** option to override – the checkout window is un-usable and the bar must be removed from the account before the patron is able to checkout items). These patrons may still log in to the OPAC to view their accounts.

Note: This is NOT the best practice and will only be used in extreme circumstances.

Barred can only be applied by certain workstations with specific permissions.

Privilege Expiration Date	09/23/2027
Internet Access Level	Unfiltered
Active	<input checked="" type="checkbox"/>
Barred	<input checked="" type="checkbox"/>
Is Group Lead Account	<input type="checkbox"/>
Claims-returned Count	0
Claims Never Checked Out Count	0
User Settings	
Default Phone Number	
Default Hold Pickup Location	
Hold is behind Circ Desk	<input type="checkbox"/>

Patron Alerts and Notes

- Automatic alerts appear to notify staff of overdue material or fines, materials claims returned, available holds, or if cards are about to expire
- Any comment or note manually placed on a patron's record should be removed when it has served its purpose.
- When a comment is placed on a patron's record, the following information should be included:
 - Date placed
 - Library's three-letter code
 - The initials of the person placing the comment
 - Details regarding the comment
- Reasons for placing a note include:
 - Personal property left at the library
 - Instructions from a patron about use of her account
 - Patron has displayed dangerous/abusive behavior towards staff.
- NEVER WRITE ANYTHING TO DISPARAGE A PATRON. ONLY WRITE THE FACTS.

Patron Alerts and Notes

When the alert is created by a system process – Available hold, Expired account, etc. – the whole page alert displays when the account is first opened.

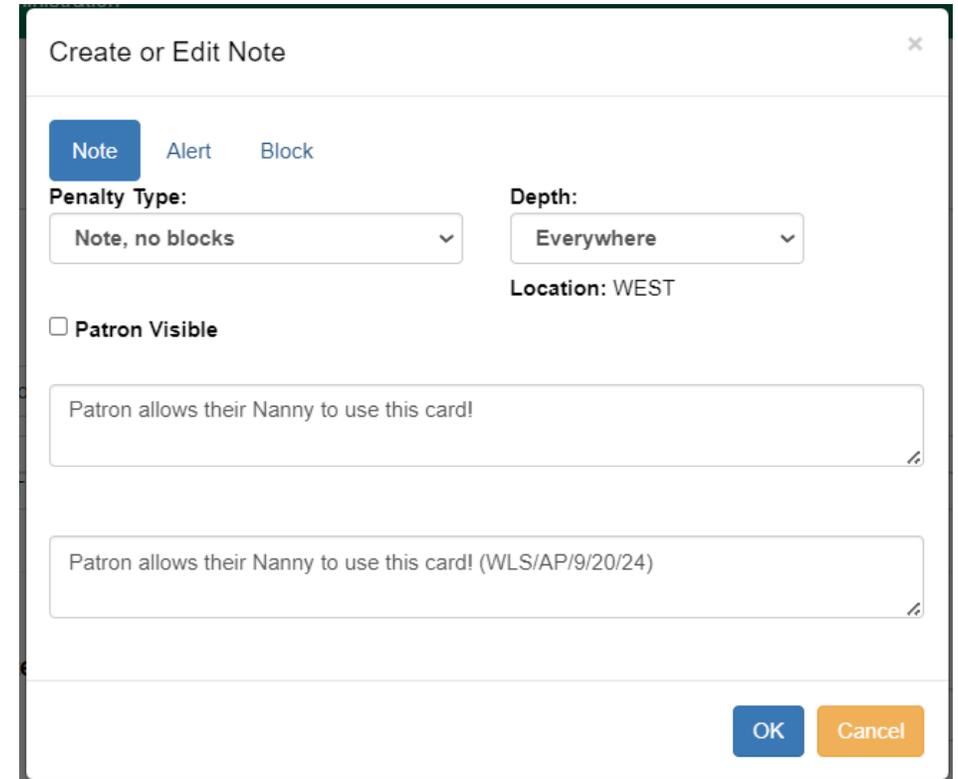
When an alert is created manually, there are three options with different displays:

- Alerting Note, no blocks – adds the red note title to the patron summary, does NOT create a whole page alert.
- Note, no blocks – note ONLY visible in Notes or Other > Display Alerts.
- Alerting block on Circ, Hold, and Renew – adds the red note title to summary AND a whole page alert, AND also blocks the account.

Patron Notes

To add a note:

- Click Create Note.
- Use the buttons or dropdown menu to choose a note type.
- Enter a Title and Note text.
- Click OK Note, no blocks displays only in Notes.



Create or Edit Note

Note Alert Block

Penalty Type: Note, no blocks

Depth: Everywhere

Location: WEST

Patron Visible

Patron allows their Nanny to use this card!

Patron allows their Nanny to use this card! (WLS/AP/9/20/24)

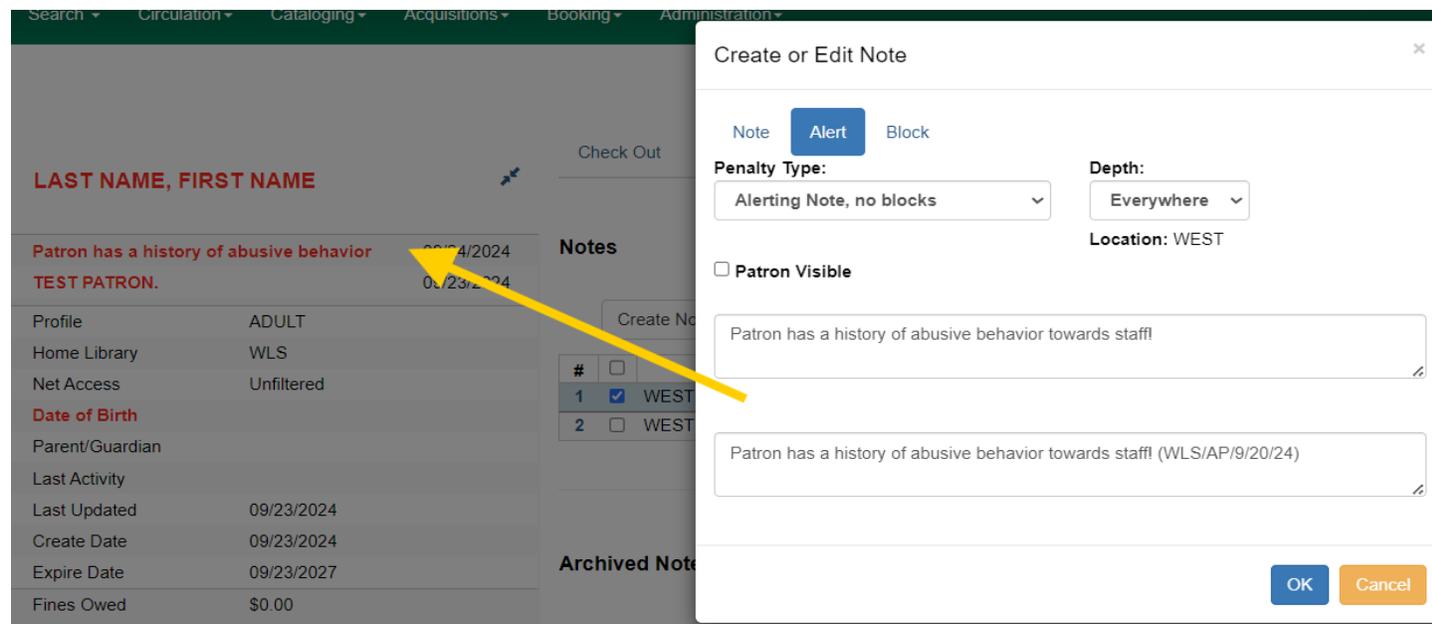
OK Cancel

Patron Alerts

What differentiates an Alert from a Note is visibility. Typically, this is information that is relevant to the staff that are working with this patron.

To add an alert:

- Click Create Alert.
- Enter a Title and Alert text.
- Click OK.



The screenshot shows a library system interface with a patron's profile and a 'Create or Edit Note' dialog box. The patron's profile includes fields for 'LAST NAME, FIRST NAME', 'Profile' (ADULT), 'Home Library' (WLS), 'Net Access' (Unfiltered), 'Date of Birth', 'Parent/Guardian', 'Last Activity', 'Last Updated' (09/23/2024), 'Create Date' (09/23/2024), 'Expire Date' (09/23/2027), and 'Fines Owed' (\$0.00). The 'Notes' section shows a note titled 'Patron has a history of abusive behavior' with a date of 09/23/2024. The 'Create or Edit Note' dialog box is open, showing options for 'Note', 'Alert', and 'Block'. The 'Alert' option is selected. The 'Penalty Type' is set to 'Alerting Note, no blocks', 'Depth' is 'Everywhere', and 'Location' is 'WEST'. The 'Patron Visible' checkbox is unchecked. The note text is 'Patron has a history of abusive behavior towards staff'. The dialog box has 'OK' and 'Cancel' buttons. A yellow arrow points to the 'Alert' button in the dialog box.

Edit a Patron's Record: Updating Home Library

When patron's move to a new town or city within Westchester and want to sign up with their new home library – they do **NOT** need a new account! Simply update their existing profile with the new information.

Use Patron Search to locate their profile, and update the following:

- Give them a NEW library barcode. Make sure to also update the OPAC/Username field to match.
- Update their Home Library.
- Update their Pick-up Library.
- Update their Physical/Mailing Address.
- Verify if their contact information and notification preferences are up to date.

Edit a Patron's Record: Account Expired

After proper ID has been shown, any library can update and re-authorize the information in an expired patron record. System default time for expiration is three years for most patron types.

- Retrieve the patron record.
- Go to Edit.
- Click **Update Expire Date**. The date will change to three years from “today.”
- Click **Save**.

Edit a Patron's Record: Update a PIN

- Retrieve the patron record.
- Go to Edit.
- Verify the Daytime Phone Number. Update as needed.
- Click in the Password/PIN field. Enter the last 4 digits of the Daytime phone.
- Click **Save**. Once the PIN is reset, the patron can change it in their OPAC account if desired.

Patron's Reading History

The Westchester Library System does not keep a record of the items that patron's checkout.

From Item Status, it is possible to see the last patron that circulated the item, but this information gets **PERMANENTLY DELETED** from the ILS 30 days after it is checked in and all fines associated with the circulation have been paid. After the 30 days, it is considered an Aged Circulation, and patron information is **impossible to retrieve**.

However! Patrons can opt in to record their reading history in the OPAC, and this is private to them. By turning off their reading history, the history will be permanently deleted.

Patron's Holds

From the patron record, in the Open Hold Requests tab, staff can modify holds using the Actions Menu. Actions include:

- **Edit Pickup Library:** Change the pickup location for this hold.
- **Edit Notification Settings:** Change how the patron gets notified when the hold is ready for pickup.
- **Edit Hold Dates:** Set specific date when activating suspended holds.
- **Activate:** Un-pause suspended holds.
- **Suspend:** Pause active holds.
- **Mark Item Damaged:** Change the Item Status to damaged if item is poor quality and shouldn't circulate.
- **Mark Item Discard/Weed:** Change the status to Discard/Weed if the item is poor quality and should be deleted from catalog.
- **Mark Item Missing:** Change the Item Status to Missing if the item cannot be located anywhere.
- **Find Another Target:** Tell Evergreen to look for a replacement copy of this item to fill the hold.
- **Cancel Hold:** Remove the hold from the patron record.

The screenshot shows the 'Holds' tab for a patron with 0/6 holds. The 'Open Hold Requests' tab is selected, and the 'Actions' menu is open, highlighting the 'Cancel Hold' option. The table below shows the list of holds.

#	<input type="checkbox"/>	Pickup Library	Title	Current Item	Status	Capture Date	Requestor Us	Cancel Cause
1	<input type="checkbox"/>	WLS	Kill Your Darlings		Waiting for Item		0383000...	
2	<input type="checkbox"/>	WLS	Vilest things		Suspended		0383000...	
3	<input type="checkbox"/>	WLS	All the Beauty in t...		Suspended		0383000...	
4	<input checked="" type="checkbox"/>	WLS	The women		Suspended		0383000...	
5	<input type="checkbox"/>	WLS	The ballad of song...		Suspended		0383000...	
6	<input type="checkbox"/>	WLS	Sunrise on the rea...		Suspended		0383000...	

Note: Cancelled Holds can be un-cancelled from the recently Cancelled Holds tab within 30 days of cancelling.

Patron Notifications

- Patrons can receive hold pickup and overdue notifications via email, phone, and/or text. A patron has a default notification setting. It can be set by staff in the patron record or by the patron in their account. A patron can opt for a different method when placing a hold.
- If a library opts into automatic renewal, its patrons receive email notifications about renewals no matter which notification method they have chosen.
- Overdue notice intervals
- **First overdue notice** is sent at **7 days overdue**, changed from 14 days overdue
- **Second overdue notice** is sent at **21 days overdue**, changes from 28 days overdue
- **Lost notice** is sent (by email and print only) at **30 days overdue**, changed from 60 days overdue
 - On the day the item goes to lost, an email notice is generated and sent to the patron who checked out the item.
 - After 7 days, if an item is still marked lost, a print notice is generated so checkout library staff can retrieve and send it.
 - Contact the help desk to request changes.

Patron Triggered Events

Sometimes a patron may claim that they are not receiving notifications about their holds becoming available, or their items-out coming due.

After verifying that their notification preferences are valid and up-to-date, it's helpful to look at the Patron Triggered Events Log.

Triggered Events can tell us whether or not Evergreen was successful in sending notifications via email, text message, or by phone call.

Triggered Event Log (Patron Specific)

#	Context Library	Title	Author	Name	Reactor	Event State	Event Run Time
1	WLS	Glass houses	Haddam, Jane 1951-	03 Day Pre-due Courtesy Notice	SendEmail	complete	4/1/25, 3:17 AM
2	WLS	The motive					

Triggered Event Log (Patron Specific)

#	Context Library	Title	Author	Name	Reactor	Event State	Event Run Time
1	PEK	The little book of common sense...	Boggs, John C.	Hold Ready for Pickup Email Notification	SendEmail	complete	6/9/22, 2:24 PM
2	PEK	The little book of common sense...	Boggs, John C.	Hold Ready for Pickup SMS Notification	SendSMS	complete	6/9/22, 9:54 AM
3	WLS	Rebecca	Du Maurier, Daphne 1907-1989	Hold Ready for Pickup Email Notification	SendEmail	complete	1/6/23, 9:24 AM
4	WLS	Rebecca	Du Maurier, Daphne 1907-1989	Hold Ready for Pickup SMS Notification	SendSMS	complete	1/6/23, 9:27 AM
5	WLS	The motive	Lesrobert, John T.	Hold Ready for Pickup Email Notification	SendEmail	complete	1/9/23, 3:16 PM
6	WLS	The motive	Lesrobert, John T.	Hold Ready for Pickup SMS Notification	SendSMS	invalid	1/9/23, 3:19 PM

Patron Triggered Events

From the **Other** tab,

1. Select Triggered Events.
2. Switch between the Circulation or Holds tabs to see a log of notification events.

When looking at the Triggered Events Log, specific columns will tell us the information we need to know.

- **Name:** The type of notification sent out.
- **Reactor:** Method of sending (email, phone call, or text message)
- **Event State:** Whether or not the notification sending was successful.
 - Event State: Complete = Successful
 - Event State: Invalid = Unsuccessful
- **Event Run Time:** When Evergreen sent the notification.

#	Context Library	Title	Author	Name	Reactor	Event State	Event Run Time
1	WLS	Glass houses	Haddam, Jane 1951	03 Day Pre-due Courtesy Notice	SendEmail	complete	4/1/25, 3:17 AM
2	WLS	The motive					

#	Context Library	Title	Author	Name	Reactor	Event State	Event Run Time
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4	WLS	Rebecca	Du Maurier, Daphne 1907-1989	Hold Ready for Pickup SMS Notification	SendSMS	complete	1/6/23, 9:27 AM
5	WLS	The motive	Lesrobert, John T.	Hold Ready for Pickup Email Notification	SendEmail	complete	1/9/23, 3:16 PM
6	WLS	The motive	Lesrobert, John T.	Hold Ready for Pickup SMS Notification	SendSMS	invalid	1/9/23, 3:19 PM

Expired Patrons

- Expired patron records are purged from the system after 18 months past the expiration date where:
 - There are no outstanding circulations, bills, or open holds (holds older than the threshold (18 and 24 months) that do not have a target copy; hopeless holds are considered not open).
 - The account has not already been purged.
 - The account is flagged as deleted (as happens after staff use a User Bucket to delete records).

Expired Patrons

Expired patron records with less than \$25.00 in fines and no lost items are purged when:

- The account has been expired 24 months or more.
- There are no open circs with a stop fines cause of LOST.
- Bills are less than \$25.
- No open holds (holds older than the threshold (18 and 24 months) that do not have a target copy; hopeless holds are considered not open).
- The account has not already been purged.
- Patron records with unresolved LOST issues will not be purged.

User Buckets

Where to find help:

- [Evergreen Documentation](#) (Evergreen homepage)
- [IT Wiki](http://it.westchesterlibraries.org) (it.westchesterlibraries.org)
- Support@wlsmail.org (WLS IT Help Desk)
- Your Supervisor!

