

## DALNET Guidelines for Resolving Patron Name Differences

The following detailed guidelines for resolving patron name differences supplement those in the DALNET Patron Record Recommendations dated 2/14/90. The standard for entry of personal names is upper case as follows: LAST, FIRST MIDDLE with no period at the end of the name or after initials.

1. Minor patron name differences can be resolved at any DALNET library using the circulation module. Spacing, punctuation, and use of upper case should be corrected to the standard form of name entry, except periods after initials which can be ignored.

EX 1: COX,DEBORAH A (on file)  
COX, DEBORAH A (incoming tape) <---correct to this form

EX 2: Tam, Pilar (on file)  
TAM, PILAR (incoming tape) <---use upper case

2. If the last name element differs, but the other name elements of two entries with the same SSN clearly identify the same person, the last name should be changed to the most recent in use, e.g., to the form on an incoming tape-loaded record.

EX: SLADE, SUSAN S (on file)  
GROVE, SUSAN S (incoming tape) <---correct to most recent last name

3. The most complete form of name should be used. Titles such as Dr., or M.D. should be omitted. Other name elements, such as Jr. or II, should be omitted and entered after the forename elements only if needed to identify the person.

EX 1: LEVINE, SIDNEY (on file)  
LEVINE, SIDNEY M (incoming tape) <---use most complete name

EX 2: SOSNOSKI, KENNETH E JR (on file)  
SOSNOSKI, KENNETH E (incoming tape) <---omit JR

4. If the order of the name elements, e.g., surname and forename or compound surname, has changed, the most recent order should be used, e.g., the order on an incoming tape-loaded record. If the forename has changed, but the surname and other name elements are the same, the most recent forename should be used.

EX 1: SANDEEP, KHURANA (on file)  
KHURANA, SANDEEP (incoming tape) <---use most recent  
order

EX 2: DORFMAN, JEFFREY S (on file)  
DORFMAN, JEFF S (incoming tape) <---use most recent  
forename

5. When two names matching on the same social security number during a tapeload do not clearly identify the same person, the following procedure should be used to obtain the correct name:

- i) Leave the first record in the patron file;
- ii) Block the patron ID;
- iii) Put a message in the note field alerting the operator to ask for name or SSN verification;
- iv) The circ desk, or NOTIS service unit, that enters the correct information should delete the note and remove the block;
- v) If the name differences are between DALNET libraries, the efforts to get corrected information should be coordinated.

EX: JORGENSON, MARYJO (on file) <---leave in file and  
block record  
WILLIAMS, D M (incoming tape)

57  
180  
1360