SHARED PATRON FILE SPECIFICATIONS

This list is not in any type of priority order, but lists the functionality DALNET needs to make a shared patron file work.

- One record per patron.
- DALNET requires the flexibility to assign one charge ID per patron for several *each* libraries or to use one charge ID for all libraries. *or any group of libs therein*
- Must allow each member of the consortium to run "days end" independently according to local parameters
- Patron records must be capable of being added either by keying in a patron record, by loading a file of records, or by adding an endorsement to an existing record.
- Any patron can have any combination of privileges based upon the library(ies) where s/he is registered.
- The patron file must interact with the patron authentication process and allow the patron the full range of privileges irregardless of where the patron is located.
- The core record will house all essential identifying information about the patron, that is name, address, phone, and unique identifying number.
- The charge ID, Btype, Bstat(s) and all transactions shall be retained in each library's database.
- Patron accounting information (bills, fines, replacement costs, etc.) will be stored with each charge ID.
- Staff in DALNET member libraries should have display only access to outstanding charges and bill/fine, etc. information from all libraries. This information should be viewable so that each library may determine whether they wish to extend privileges or not, based upon local policy.
- Patron empowerment shall not be affected by the location of the patron. A patron standing in Detroit Public Library should be able to renew his books charged out from Wayne State or to place a request for a WSU book.
- The second ID field shall be computed based upon the patron's month and day of birth concatenated with the last four digits of the social security number. A numerical calculation will be made upon the numbers to create a unique number. This unique number will be used to dedup the patron file and to access protected files.
- Multiple addresses are allowed. Addresses can be linked to a location. Each site may select the address they wish to use.
- Patron records will support internal as well as external mailing addresses.
- There shall be site specific and shared notes
- Any DALNET member library will be able to edit/update core records
- Blocks are institution specific, that is a borrower blocked at Wayne State should not be blocked elsewhere unless they are also blocked at that library.
- Each institution will be able to determine their own thresholds for blocks.
- DALNET libraries will be able to add fields to the agreed upon core record, but they must accept at least the minimal data in the core record.
- Proxy borrowers shall be accommodated.

- Records for minor children shall include fields for the names of the parents or guardians. These fields should be multiple and repeatable.
- When a minor child reaches the age where s/he is considered eligible for adult privileges, the record will roll over to an adult Btype.
- The process of creating a shared patron file should not unduly complicate the circulation tables.

Ae
12/3/1998