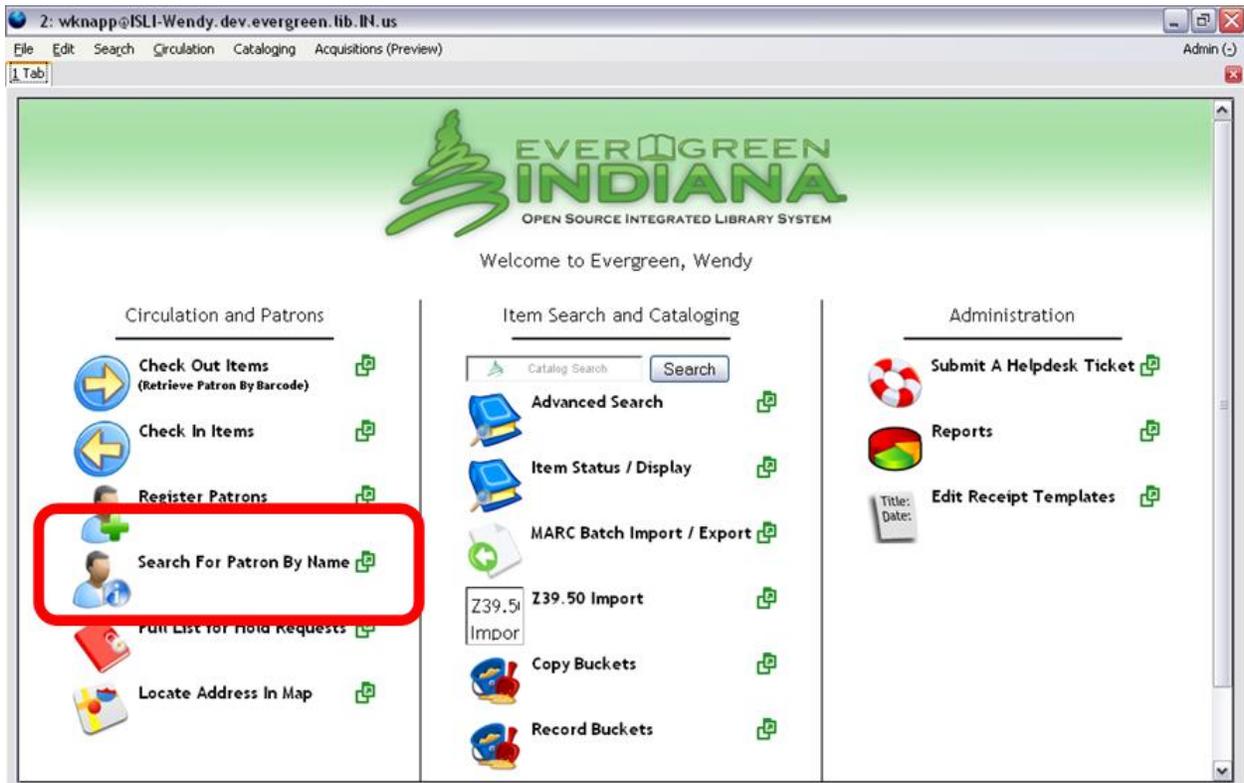


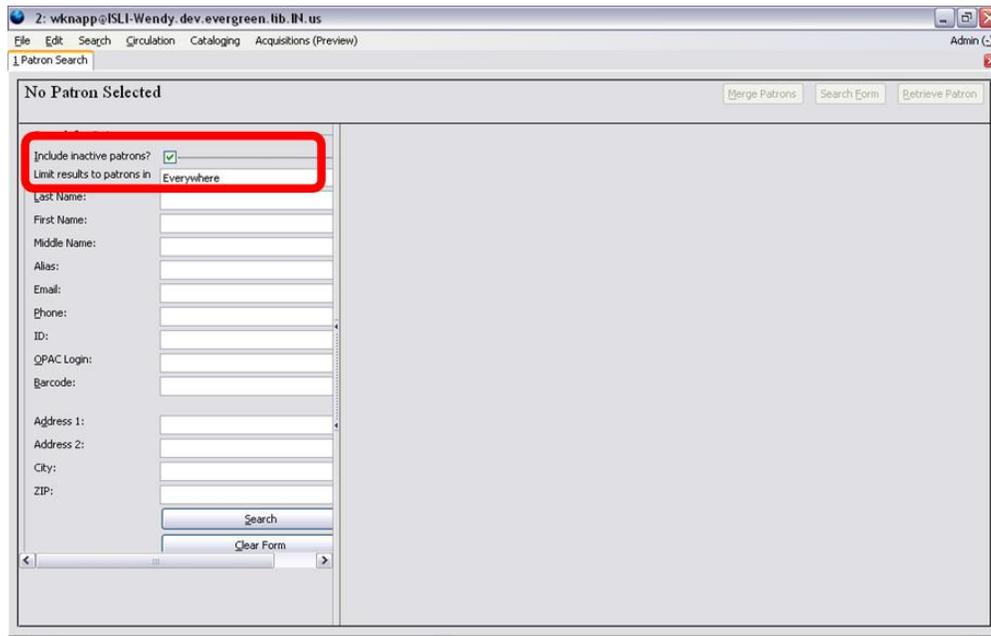


Merging Patrons

Duplicate patron records (i.e., two accounts for the same individual) should be merged to create one record. If one or more of the accounts are not at the same library, both (or all) member libraries must consent to the merging of the records.

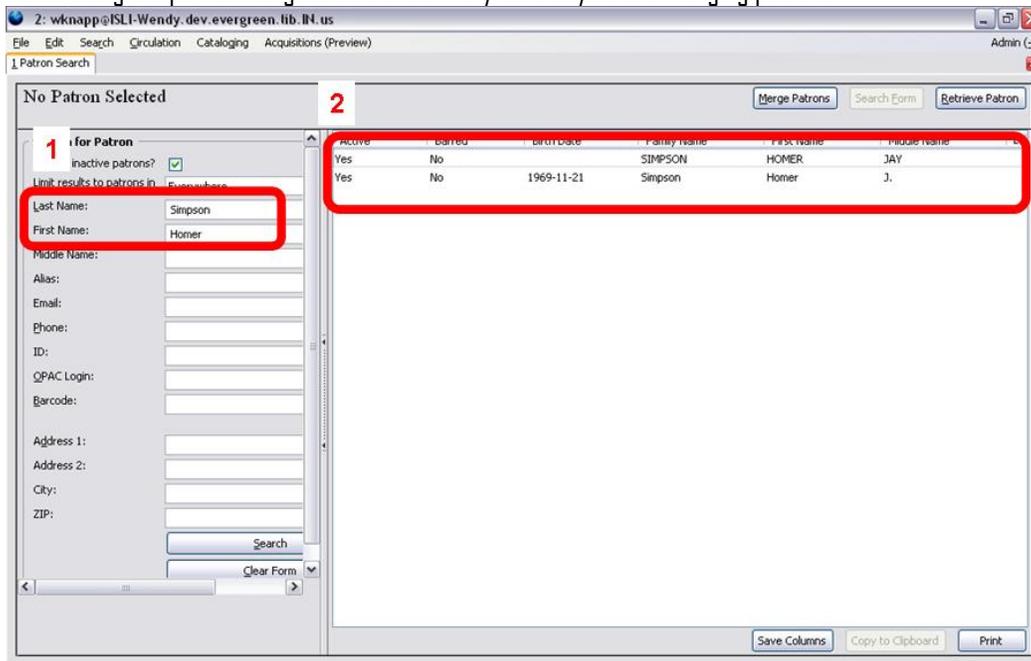


Search EVERYWHERE (the entire Evergreen Indiana database) and be sure to check the box next to "Include inactive patrons"

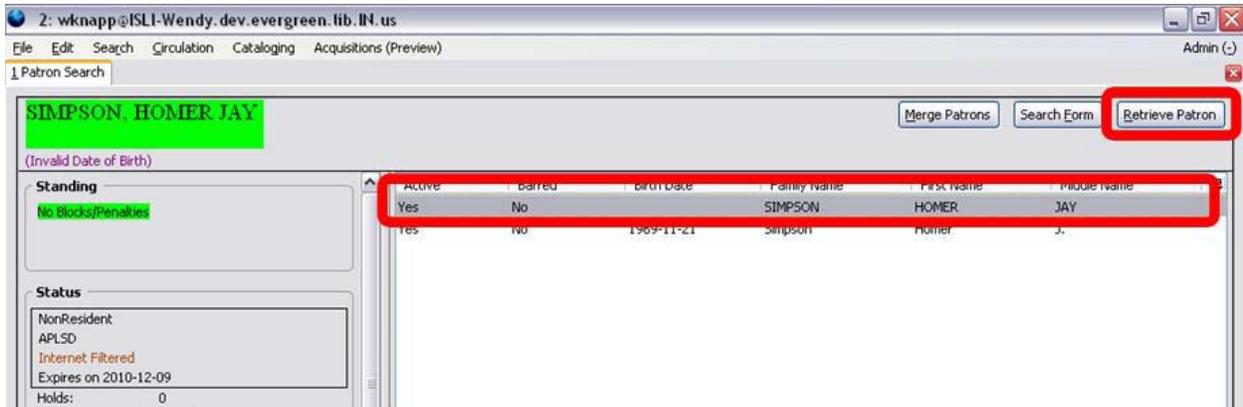


A search by the patron name will show the results of each record for that patron, and may include patrons who are NOT the same and should NOT be merged.

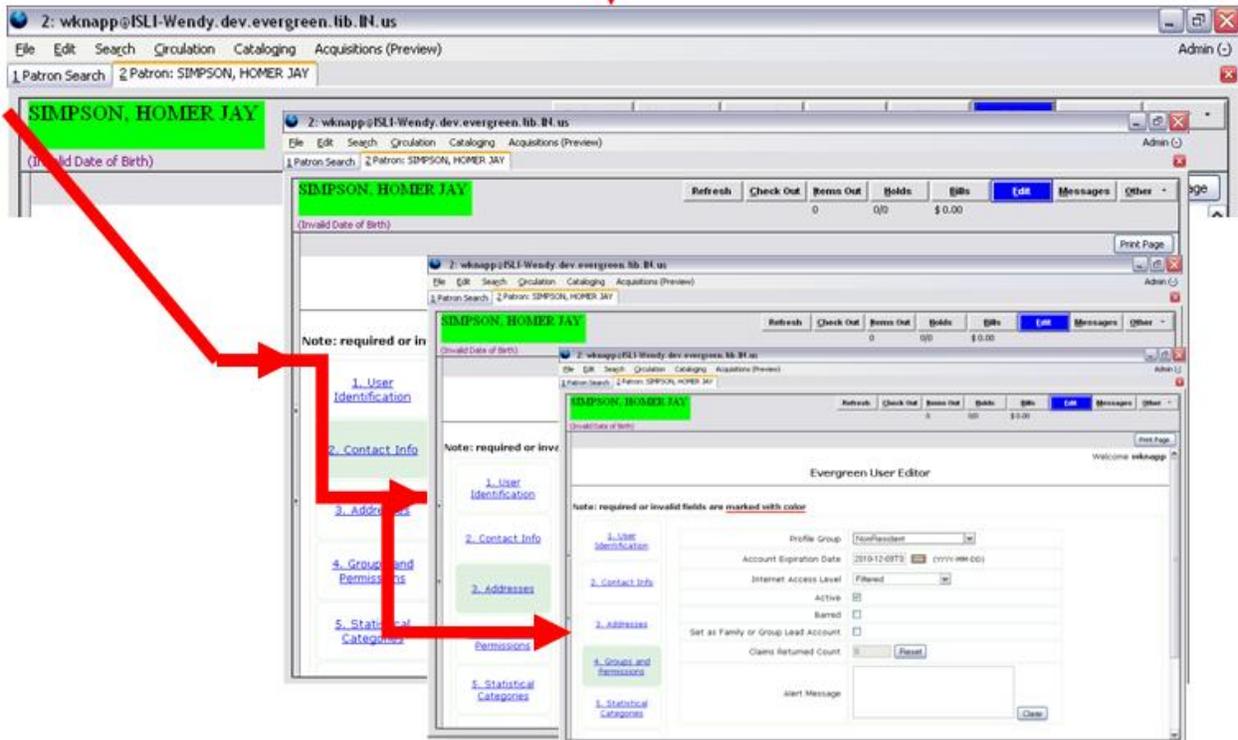
The Local Admin doing the patron merge should check very carefully before merging patrons.



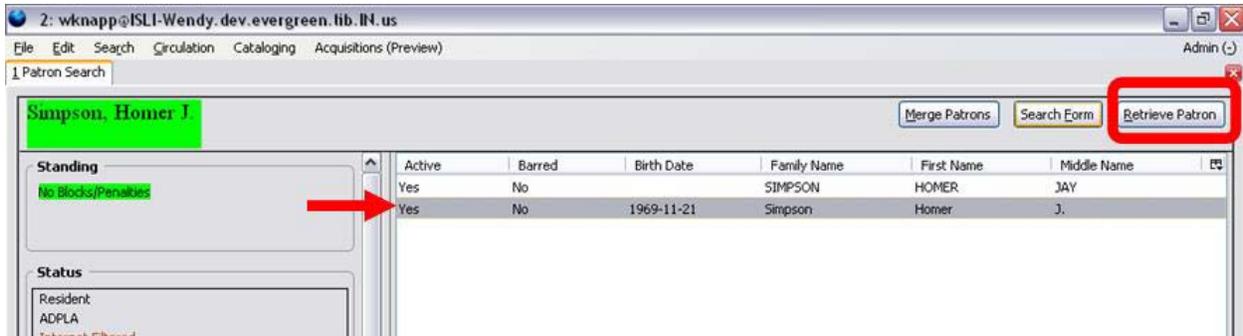
Highlight the first patron that may need to be merged and click Retrieve Patron.



Evaluate the patron data from each step in the "Edit Patron" module. Be sure the patron is the same person for all records that you wish to merge.



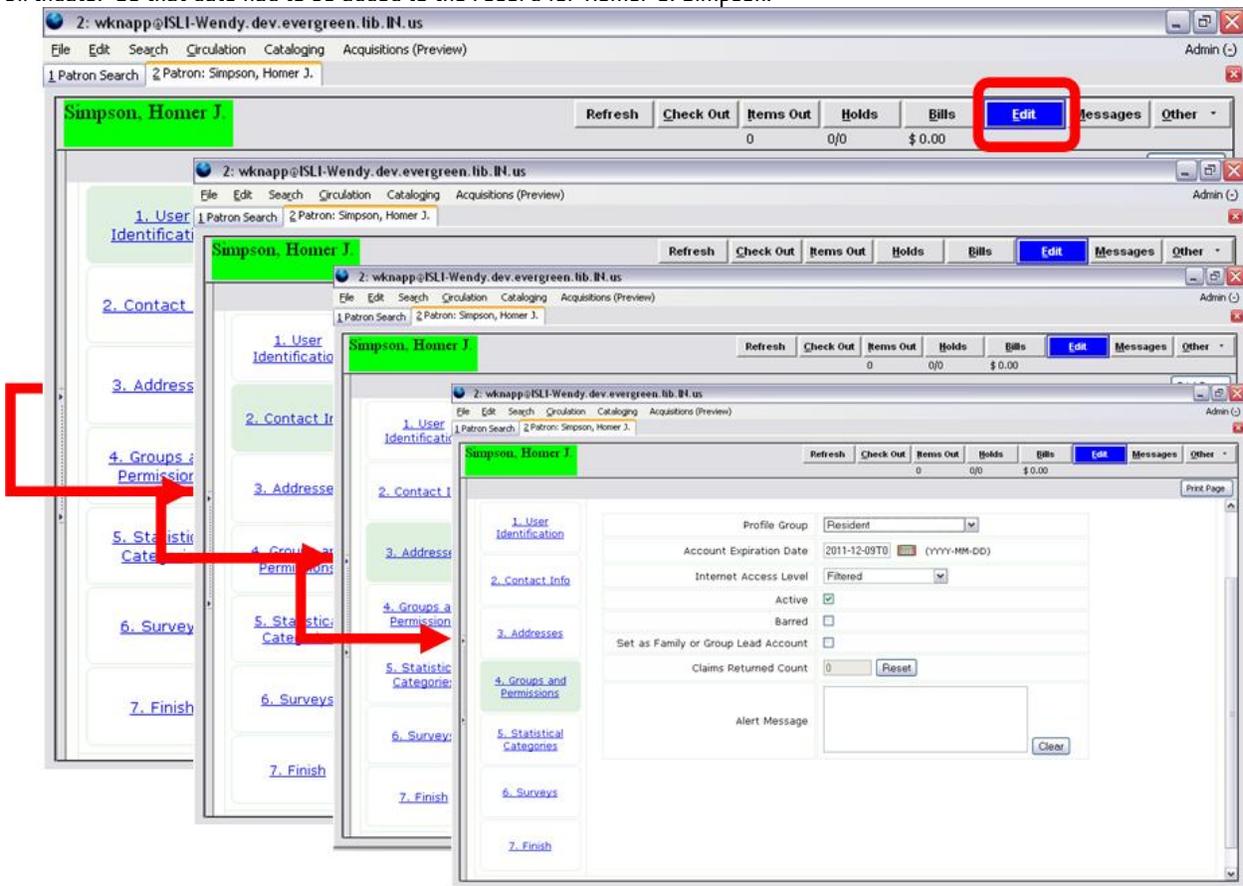
Highlight the second patron that may need to be merged and click Retrieve Patron.



Evaluate the patron data from each step in the "Edit Patron" module. Be sure the patron is the same person for all records that you wish to merge.

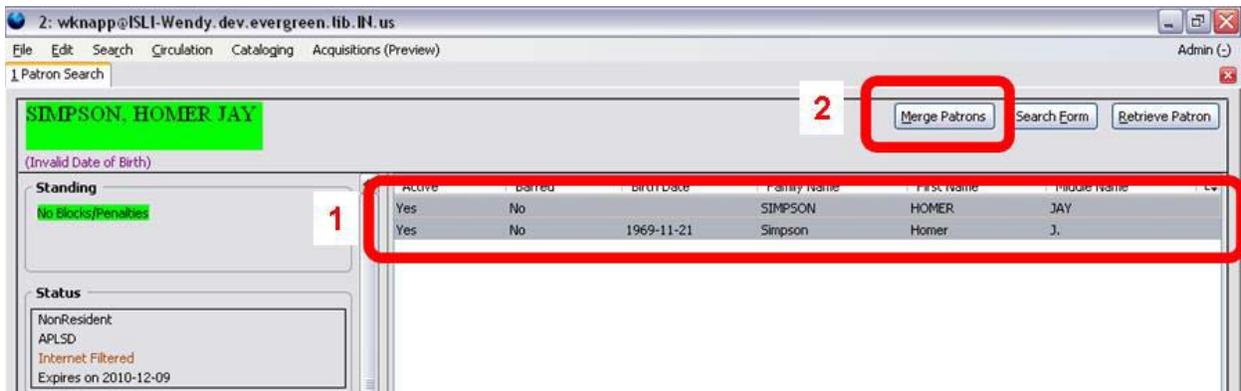
Note that you may need to consolidate information. There will be only one patron record, so you may need to add information to the record for the patron's Home Library from the additional patron records.

In this example, Homer J. Simpson will be the lead record, but the record for HOMER JAY SIMPSON has his correct birthdate. So that date had to be added to the record for Homer J. Simpson.



When you are POSITIVE the patron records are for the same person, and you have recorded all of the pertinent information in the record that will remain, select both records.

1. Click the first patron; hold the CTRL key; and click the second patron
2. With both patron records highlighted, click the Merge Patrons button in the upper right.

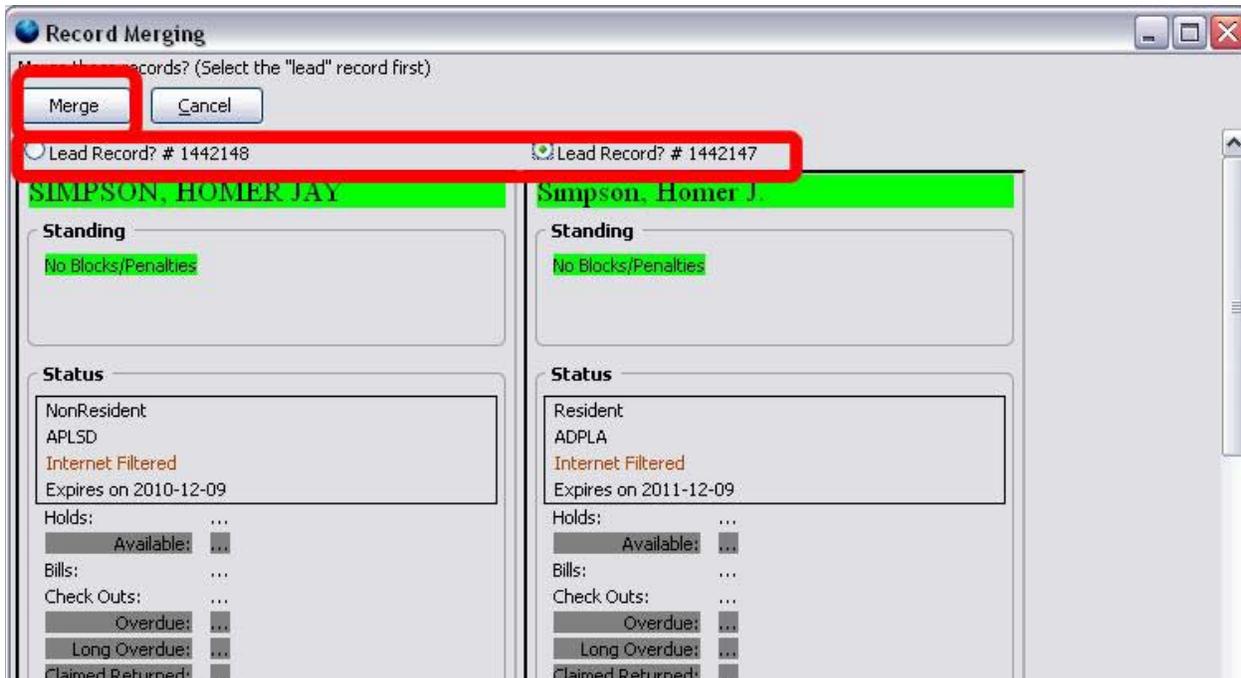


Another window pops up where you can compare the selected records one last time and verify they are records for the same person.

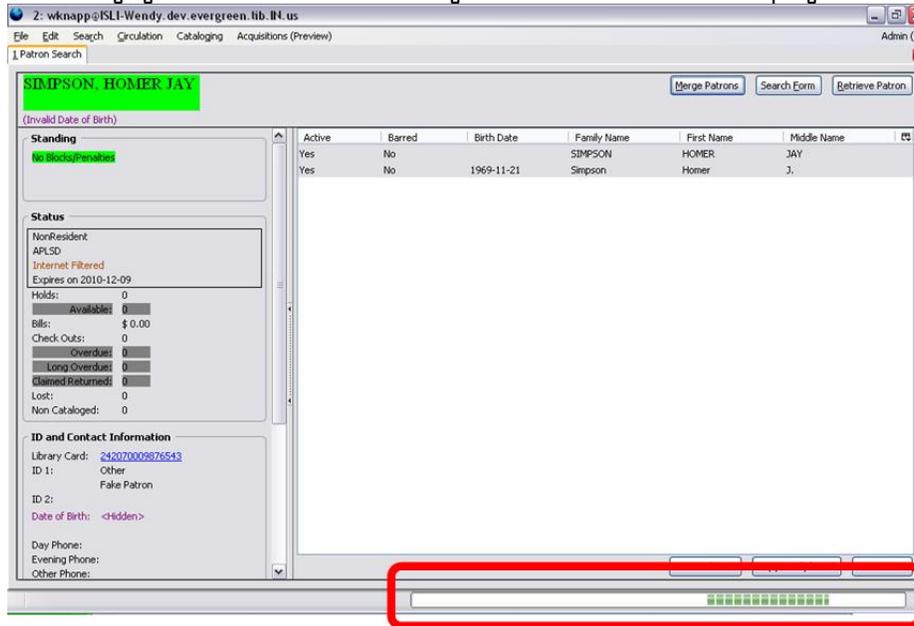
1. Select the "Lead Record" by clicking in the circle next to the record that will remain.
2. Click the "Merge" button.

THIS WILL BE A PERMANENT CHANGE. There is no way to undo this merge.

The helpdesk cannot repair mistakes made by users performing patron merges.



While the records are merging, a status bar in the bottom right of the screen will show that progress is being made.



The patron will continue to use Evergreen Indiana by using the card associated with his home library.

