CCS Patron Merging Guidelines

Overview

Merging is the process of joining together two separate patron records. One record is selected as the primary record. This record is retained in the Polaris database. Select information from the secondary record is copied over to the primary record, then the secondary record is deleted.

The following information from the secondary record is copied to the primary record:
- Barcode – Copied to the Former barcode field.
- Blocks – Copied to the Free Text and Library Assigned fields.
- Notification history – All previously-generated notices are copied.
- Items out - The list of items out.
- Hold requests – Active, Inactive, Pending, Located, Canceled, Not supplied, and Out to patron holds and ILL requests with a status of Held, Shipped, or Unclaimed.
- Claimed and lost items – The claimed and lost item counts are totaled in the saved record.
- Patron account – The charges and credits are totaled on the saved record. The YTD and Lifetime Circ as well as the new YTD and Lifetime You Saved amounts are also totaled on the saved record.
- Notes – The notes from the deleted record are appended to the notes on the saved record and separated by a blank line. A note indicates the record was merged and provides the barcode of the deleted record and the date/time that the merge occurred.
- In addition, a new transaction: Modified via Leap merge is recorded for the saved record.

IMPORTANT: One two records are merged, they cannot be unmerged.

When Should Staff Merge Records?

Staff should merge records if they can identify two duplicate patron records **registered to their own library** in the database. To determine if records are duplicates, match on the following fields:
- Name
- Address
- Patron's Registered Library
- Birthdate (if available)
- Drivers License (if available)

Staff should, at the minimum, match on the patrons' names, addresses, and registered library if the other fields are not available.

Staff should not merge records if:
- The patrons are not registered to your library.
  - Please contact the patrons' home library if the records should be merged.
- The patrons are registered to two different libraries.
- The patrons' names are slightly different - this may be a sign the records are of two family members.
- The addresses are different.

If staff are unable to match on the required fields, they may place a note or block (depending on local procedure and/or situational needs) on the patron(s) record(s) until they have an opportunity to check in with the involved parties.
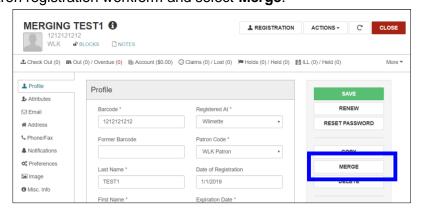
A Note about Post-Migration Patron Merges:
As new libraries are brought into CCS, staff may encounter both a CCS record plus a non-CCS reciprocal borrower record (from the new library) for the same patron. These records will have the same patron barcodes. CCS will perform patron cleanup after a migration, but staff can merge duplicate patron records as they are encountered. In addition to the barcode, continue to use the above criteria for determining if the record should be merged or not.

If there are any questions or doubts on whether or not the two records should be merged, err on the side of caution and do not merge. Instead, use Notes or Blocks to communicate the situation to colleagues. Staff can email help@ccslib.org with any questions.
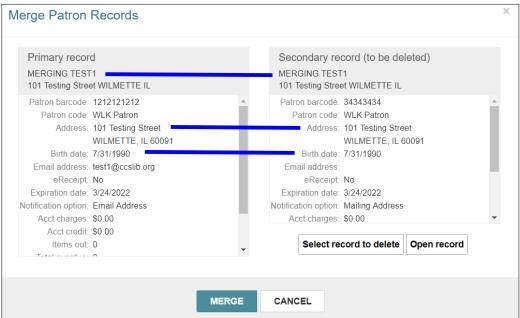
Merging Step-by-Step
If you believe you have identified two separate patron records belonging to the same person, use the guidelines above to check the record data. If the names, addresses, and registered libraries match (also compare birthdates and/or drivers licenses if available), take the following steps to merge the patrons.

1. Select one record to be retained as the primary record. This record should be the one the patron is currently using - the library card number for the primary record will be retained as the active card.
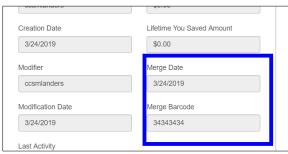2. Open the patron registration workform and select **Merge**.

3. A pop-up will appear instructing you to select a secondary record to delete. Click **Select Record** to Delete.

4. A patron Find Tool will open. Locate the secondary record and click **Open**.

5. The info for the secondary record will populate the merge pop-up. Check once more to make sure the information matches.

6. Click **Merge**.

7. A pop-up will appear confirming if you would like to proceed with the merge. Select **Continue** to complete the merge. Select **Cancel** to cancel the merge.

8. The records will merge. The secondary record barcode will be copied into the Former Barcode field. A merge date and merge barcode note will be added to the Misc. Info section of the registration workform.

Merging ILL Libraries

Staff may choose to check outgoing OCLC requests to a library account in Polaris. As staff are searching for ILL Libraries, they may come across duplicate accounts.

To determine if two ILL Library accounts are duplicates, staff should check the institution name and address. The library names may not be identical, but should indicate they are of the same institution (example: "Newton Public Library" vs "Newton"). The street number, street name, city, state, and zip should match on both accounts.

To merge ILL Library Accounts:
1. Select the account that follows current registration procedures (see https://www.learning.ccslib.org/ill-libraries) to be the primary account.
2. In the primary account, open the patron registration workform and select **Merge**.
3. A pop-up will appear instructing you to select a secondary record to delete. Click **Select Record** to Delete.
4. A patron Find Tool will open. Locate the secondary record and click **Open**.
5. The info for the secondary record will populate the merge pop-up. Check once more to make sure the information matches.
6. Click **Merge**.
7. A pop-up will appear confirming if you would like to proceed with the merge. Select **Continue** to complete the merge. Select **Cancel** to cancel the merge.
8. The records will merge. The secondary record barcode will be copied into the Former Barcode field. A merge date and merge barcode note will be added to the Misc. Info section of the registration workform.

If both accounts have items currently checked out to them or if staff would prefer not to perform the merge themselves, do not merge and open a Help Desk ticket with CCS (email help@ccslib.org). CCS will evaluate and perform the merge.