How to create a new user record in Alma for Community Borrowers.

NOTE: if a user is affiliated with a Fast TRAC institution they shouldn’t need a borrower’s permit, they use their institution card. A list can be found here: http://www.lib.uiowa.edu/circ/libcards/

It’s a good idea to review the guidelines for who gets permits and what kind of permits users are allowed: http://www.lib.uiowa.edu/circ/libcards/

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Always check for existing patron record/name match. Ask the user if they have ever been a student, staff or faculty at UI or if they have ever had a Community Borrower card here.

Even if they say “no.” Check for an existing record. Users forget or they may just not realize they have an existing record with us. If you find an existing record, use the instructions for converting UI records.

Verify that the user continues to have proof of Iowa residency or proof of their continuing attendance at an Iowa university or college. As proof of residency we accept State of Iowa driver licenses, Johnson County Community IDs, rental agreements, voter ID cards, utility bills. Almost any bill with a patron name and an Iowa address will do. Iowa residency for our purposes is proven by possession of a current ID from an institution of higher learning in Iowa. If the user attends a FastTrac institution they can use their home institution ID to check out books and no longer need a Community Borrower card.

Some patrons may have donated to the Friends of the Library organization and we make Community Borrower cards for those individuals regardless of where they live. These borrowers will provide you a letter confirming their donation.

Manage patron record -> search by lastname, firstname. If a match is found, verify that the user is the same person by matching the address in the contact information tab. “Are you the firstname lastname who lived at such and such an address.” If they say no, create a new record. Ask for a middle name to differentiate users with same or similar names in our records.

If you have a match, use the set of instructions called “How to renew an existing Community Borrower record in Alma” or “How to convert an existing expired UI Record to a Community Borrower record.”

If no existing record is found, proceed to enter information from the Community Borrower information form you have given the user to complete:

1. Register new user by clicking on the blue button “Register New User”

2. Fill out First Name, Middle Name (or initial) and Last Name

3. Replace Primary identifier number with the nine digit number subset of the pink barcode sticker. The sheets have two identical stickers. One sticker will be placed at the first square on the Community Borrower form and one sticker for the Community Borrower card. This number for new users always begins with 983 and is nine digits.
4. Change user group to Community Borrower.

5. Add an expiration date for 1 year from today’s date.

6. Add password (twice to verify). Passwords will always begin with Ui (uppercase “U” and lowercase “I”) and then the nine digit number beginning with X83
   
   correct: UiX83xxxxxx (based on the 983xxxxxx of the User ID with “X” replacing the “9”)

7. Check e-mail address type: (using “home” is fine as a default for all these fields) and then add the e-mail address. *E-mail contact is required for all new Community Borrower records.*

8. Check address type: (use “home” as a default) and add address

9. Check phone type: (use “home” as a default) and add phone number.

10. Click blue button at top “Update User”

11. Click user ID number

12. Click Identifiers and scan if full barcode and update

13. Click Statistics and Add Statistic: Category type: Iowa Resident Statistical Category: Community Borrower

14. Test card to ensure it brings up the record just created. Check the expiration date which you will write on the card along with the user’s name.

15. Put completed and signed application in daily papers box for Donald Baxter.

3/15/19 dab