# Creating a New Patron Record

Before you create a new patron record, you should:

- Ask the patron if they have had a library card before
- The patron/guardian must have an ID.   (Types of IDs excepted: Driver's License, MN ID card, Passport, Military ID)
- The patron/guardian must fill out and sign the registration form
- If the address on the registration form is different than the address on their ID. The patron must provide a utility bill with their current address on it. The bill can be electronic.
- Do a name search using the patron's Last Name, and the first three letters of the First Name in Sierra to verify the patron is not in the system already.
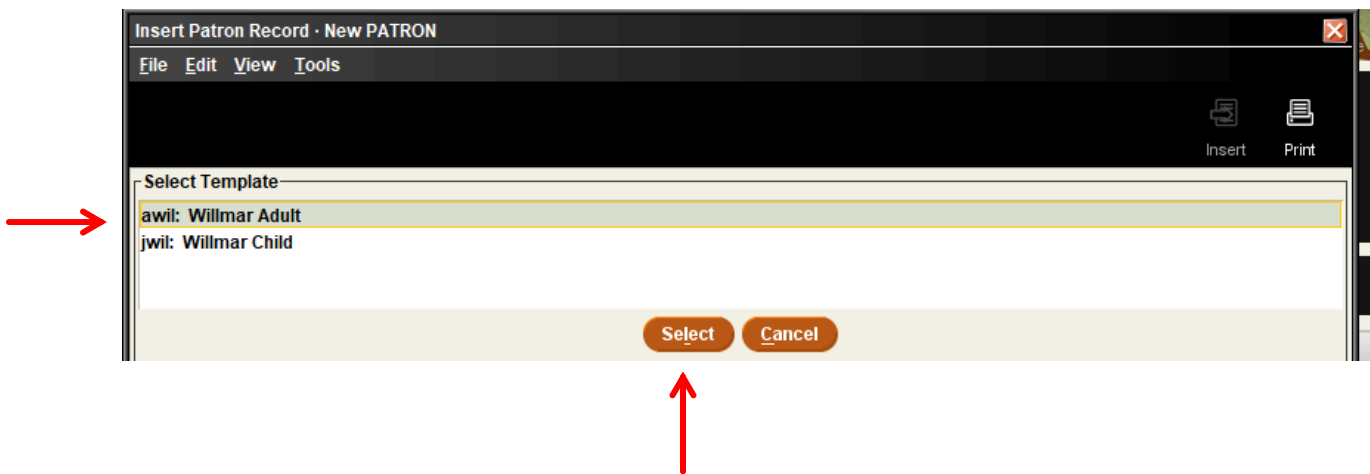
1. Click on the ⊞ New button.
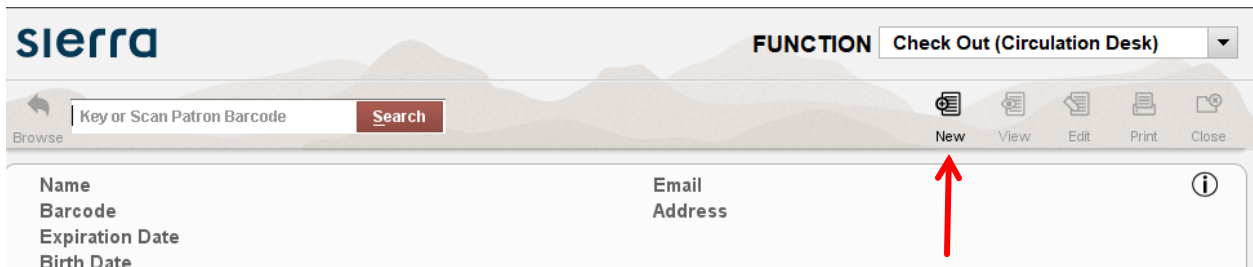
2. Enter your Initials and Password
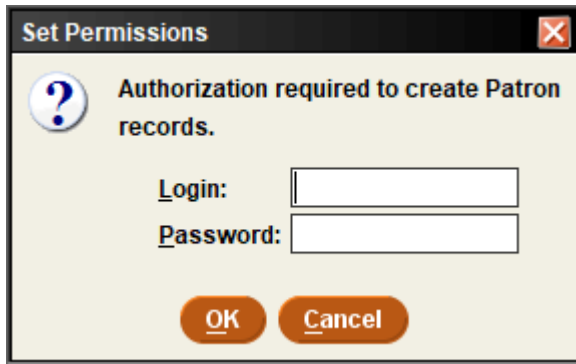
3. Choose the Adult or Child template and Click on **Select**

4. Enter the information the window is prompting you for. Click on the **Next** button to move to the next prompt.

- Expiration Date – The expiration date is 1 year from today.
- Birthdate
- City/ Township - Use the MN Polling Place Finder to verify the City/Township after verifying that the address is current. http://pollfinder.sos.state.mn.us/
- Notice Preference – Choose "print" or "email"

All the information entered in the following fields is in CAPITAL letters, except the email address should be entered as it shows on the registration form.

- **Name –** Verify the name (Legal name must be used here). Enter as LAST NAME, FIRST NAME MIDDLE NAME. There should be a comma after the last name.
- **Guardian** (If patron is a child) – Verify the name (Legal name must be used here).   Enter as LAST NAME, FIRST NAME MIDDLE NAME ID NUMBER (Identify where the number came from if it isn't a Minnesota Driver's License number. Examples: PASSPORT, MILITARY ID, OR WISCONSIN) There should be a comma after the last name.
- **Address –** Verify the address. Enter the street address. If the patron a PO Box, enter both the street address and PO Box. Enter the information as   shown in figure below.

- **Address 2** (If used) – Verify the address. This address information should be the patron's permanent address if the first address is seasonal or temporary. If both PO Box and street address are given, enter the information as shown in figure below.
- **Telephone** - Patron's primary telephone number. The number should be entered XXX-XXX-XXXX.
- **Telephone 2** (If used) - Patron's secondary telephone number. The number should be entered XXX-XXX-XXXX.
- **Email Address -** Make sure you have it entered correctly. (Emails are case sensitive, and pay close attention to dashes "-", and underscores "_".)

- **DL or ID # -** Verify the number. (Identify where the number came from if it isn't a Minnesota Driver's License number. Examples: PASSPORT, MILITARY ID, or WISCONSIN.) The number should not contain any spaces or dashes.

> ❗ **IMPORTANT:** Leave the DL or ID # field blank if it's a child's card

- **Barcode -** The active barcode should always be listed first.

Name	LAST NAME, FIRST NAME MIDDLE NAME	
Guardian	LAST NAME, FIRST NAME MIDDLE NAME ID NUMBER (IDENTIFY # IF NOT MN LICENSE)	
Address	Street	123 4TH ST PO BOX 123
	City/State/Zip	SOMEWHERE MN 55555-1212
Address 2	Street	123 5TH ST NW PO BOX 456
	City/State/Zip	NOWHERE MN 99999-1212
Telephone	000-000-0000	
Telephone 2	000-000-0000	
Email	asdfg@gmail.com	
DL or ID#	1234567899 INDENTIFY # IF NOT MN LICENSE (DO NOT PUT GUARDIAN DL OR ID # HERE)	
Barcode	26601000000000	

5. If the patron wants to use a "Preferred Name", follow the instructions on the **Patron with a Preferred Name** instruction sheet.