

ACCOUNT FORMATTING BEST PRACTICES

When creating a new account, follow these best practices to ensure consistency. It helps us maintain healthy data, which improves searching and customer service. Staff do not edit user entered account information unless it is wrong.

Primary addresses are residential and/or owned property.

ECARD and ONECard do not follow staff conventions. ECARD can catch misspelled streets when verifying addresses, but it does not change the formatting of the address to our conventions.

MINIMUM INFORMATION TO ENTER

All accounts need to have a first name, a last name, and a birthdate.

ADDRESSES

Incorrect Examples	Correct Examples
123 S W 5th ST CIR	123 SW 5 CIR
300 S BLVD	300 S BOULEVARD
4617 S SHIELDS BOULEVARD	4617 S SHIELDS BLVD
8125 F WHITE CT	8125 WHITE CT # F
123 D HAPPY ROAD APT 3	123 HAPPY RD # D3
3682 ST PATRICK	3682 SAINT PATRICK DR
2345 NORTHWEST EXPRESSWAY	2345 NW EXPY
9786 N PENNSYLVANIA AVE	9786 N PENN AVE

Numbered Streets

- On numbered streets do not use -th, -rd, -st, etc. like 4th, 3rd, 1st
- Use the suffix for the street if it has one: ST, PL, CIR, TER, etc.

Named Streets

- Always spell out the street name, but you can abbreviate the suffix.
- PENN (Pennsylvania) and NW EXPY (NW Expressway) can be abbreviated

Apartments / Duplexes

- Put # instead of APT then enter the unit number.

PO Boxes

- If an account uses a PO Box as a primary address remember to verify they qualify for the selected account type.
- You may abbreviate PO Box as BX or spell it out as PO Box

Secondary addresses

- This is used when a person lives at one location, but wants their mail delivered at a different location. Generally used for PO Box situations.

Sponsor address

- This is used when the account is a student account.
- Enter the parent name on the Sponsor line. Mail will be addressed to the Sponsor.
- Enter parent/guardian name as: SponsorLast, SponsorFirst, SponsorMiddle
- Do not put a period after the middle initial.

PHONE NUMBERS

- Phone numbers must include all 10 digits
- There must be division between the area code, the prefix, and the last 4 using dashes
- 405-606-3779 is the correct format

MISC. PATRON REGISTRATION SITUATIONS:

- **School Accounts** – Must be re-issued each year based on continued eligibility. Set card expiration at one year.
- **Special Stop** – When an account resolves a Special Stop status issue contact the ILS Administrator or your Library Manager (ban) to be removed. DO NOT delete any notes from the account.
- **No Primary Address Listed** – In the rare instance an account holder is adamant they do not want their address listed on the account, we will follow these conventions:
 - If they have a PO Box, we will list that as their primary address and in the secondary address field staff will enter “physical address verified staff initials/location”. “Which address” should be set to Primary.
 - If they do not have a PO Box, in the primary address field staff will enter “physical address verified staff initials/location” and change the “Which address” to none.
 - By doing this, they will not receive any notifications.
- **School Visits and Library Cards** – We should not be issuing library accounts without parental authorization. For school visits, teachers need to coordinate with library staff to get library card applications. The school can send home library card applications and if the parent is okay with us issuing them a card, the parent needs to return the completed form to the school. Once the school has a completed library card application, they can give those to the library for us to issue cards.
 - Since most school visits have students that reside within our service area, they will receive a Primary account. However, for districts that may have students that live outside our service area, those students should be issued a School account.

RARE PATRON REGISTRATION SITUATIONS

- **Correctional institution address**
 - For adults, use as the primary address.
 - For students with a parent as guardian, use as the Sponsor address. Enter on the Sponsor line: StudentLast, StudentFirst/ParentLast, ParentFirst. This way we have the sponsor's name, but the student will receive the mail.

- For students with an institution as guardian, use the Sponsor address. Enter on the Sponsor line: StudentLast, StudentFirst/GuardianLast, GuardianFirst
- **Care/Of address**
 - This is used for Power of Attorney situations. Add a standard note to note additional details.
 - Enter the c/o person's name in the Secondary Address field, NOT an address.
 - Their mail will be addressed: PrimaryLast PrimaryFirst C/O COLast, COFirst
- **Address Confidentiality Program**
 - Participants will have a card they show that includes their name, ACP number, and expiration date.
 - The reason for entering the ACP number by the name is that the mailing address for all ACP eligible people is the same. Their card will provide the PO Box that the mail is delivered to. Then, once the Post Office delivers the mail to that PO Box, the ACP organization uses the number and name combination to get the mail to the right people. Enter the PO Box just like any other address for a Primary account using the Primary address field. The secondary address is not required because there is no street address to be entered in this situation.
 - Including the number by the name indicates that this is an ACP customer and that having a PO Box as a primary address is fine.
 - Adult account
 - List the ACP number to the Middle Initial (SMITH, JOHN T-1324)
 - Student account
 - On Sponsor line, list the ACP number as the Sponsor's middle initial (SMITH, JANE A-1324)
 - Set expiration date to match the expiration on the ACP card.
- **Emancipated Minors** – Make the card a 'Primary Student' card, change 'Which address' to 'Primary.' Fill out the required information. In the Secondary Address line put Emancipated.