

Entering patrons by hand, Pre-K thru 12 schools, September 2017

(prepared by Nancy Grant, Carmel Schools are the examples)

Have on hand:

- List of students, with grade (may also use homeroom number)
- Graduation year (possible 8th graduation if K-8 district or 12th grade if K-12 district)
- School's road name and zip code (for privacy, unless student home information allowed)
- Bar code labels starting with 2 (not 3, which is for materials)

Procedure to follow

1. Evergreen – choose **Patron Registration** (reload if not showing long page of fields to enter)
2. Scan bar code and place bar code with student name on rolodex or checkout sheet.
3. OPAC user – use first and last name, all lower case, no spaces
4. Password comes up twice – write it down on your list of students (or somewhere)
5. First name – capitalize first letter
6. Last name - capitalize first letter
7. Primary ID type – Choose “other”
8. Home library – choose correct building from the list
9. Main (Profile) permission – Choose “Student”
10. Privilege Expiration – use graduation date with June 30 (6/30/2022)
11. Internet access – possibly leave filtered for students, definitely change to unfiltered for staff
12. Postal code, street, city – use school (or student as district allows)
CES = 04419, Plymouth, Carmel or SES = 04456, S. Levant, Levant
13. Graduation year = use 8th or 12th year, dependent on district configuration, just year (2022)
14. If wanted, add homeroom number, homeroom teacher or ELA teacher. But if this changes yearly it may not be the best choice to add.
15. Save – NOT save and clone.

Critical information

Use bar codes starting with 2

Choose Student in Maine (Profile) permission

Check with school administration about filtered or unfiltered access for students

Schools using MSLN for Internet are already filtered for under 17 year olds

Using Graduation year allows over due reports to be sorted by grade level

It may be possible to download much of this information from your school's student database.
Ask Balsam about this.