

# Borrower Records

This section explains how to register a new borrower and how to edit an existing borrower's record. We'll begin with the policies that guide and govern this process.



## Printable Quick Guide: Borrower Records

# Registration Policies

## Getting a Card

A borrower must show proof of identification to register for library services. A government issued ID is preferred, such as a driver's license or MCP card. We do not record the details of the ID.

Each borrower is given a free plastic library card and should sign on the back. There is a \$2 replacement fee for lost or damaged cards, although cards which become worn or damaged through normal wear and tear can be replaced free of charge.

A library card provides access to the services of all public libraries in the province, including the checkout of items, use of eLibrary services, and use of public computers.

A borrower can hold only one active card at a time.

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## Registration is Paperless

Registration is recorded directly into Horizon. However, if the circulation desk is busy or if Horizon is down, then a patron can complete a [Borrower Registration Form](#). The form must be shredded once details have been entered into Horizon.

If Horizon is down, then do not provide a library card at this time. When Horizon is

working again, check that the borrower does not already have an account and then register them in Horizon.

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# Registering Different Borrower Types

## Children Under 13

A parent or guardian must apply for the child's membership. If they do not have an ID present for the child, then they can show an ID for themselves.

Use the child's name. The parent's name should be recorded in the 'Parent/Guardian' field of the borrower record. The parent's email address should be used.

Children are issued a child library card which the parent must sign.

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## Young Adults (13-17 inclusive)

A young adult must apply for their own membership and show their own ID. If they don't have ID, then the ID of a parent or guardian who is present can be used instead.

Young adults are issued a regular library card. A young adult takes full responsibility for borrowed materials and must sign their card.

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## Talking Book Borrowers

The Talking Book audiobook collection is produced by CNIB and housed at A.C. Hunter Library in St. John's. To register as a talking book borrower, a patron must have a CNIB number or a registration card signed by a doctor or registered nurse. A talking book borrower could be homebound, a walk-in, or a non-resident.

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## Visitors from Out of Province

A visitor from out of province who wants to borrow items can be registered using a Temporary Card made of cardstock. Cards are available from Technical Services.

Visitors from out of province includes tourists and people visiting their family.

A person who resides within the province is not a visitor and should be registered as a regular borrower. This includes students at Memorial University of Newfoundland (MUN) or the College of the North Atlantic (CNA).

Record the visitor's temporary address first and the permanent address second in the borrower record.

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## Registering a New Borrower

Before registering a borrower, check that they are not already registered.

Delinquent borrowers sometimes try to re-register rather than pay fines. Borrowers who have moved within the province sometimes don't realize that their card is valid at all provincial libraries.

## Searching for a Borrower Record

To check if a borrower is already registered, perform a borrower search. Go to the Checkout tab and press **[F4]** or select from top menu **Borrower > Find Borrower**.

A pop-up window will appear:

Search - Borrowers

Indexes:

Borrower Last Name Alphabetical

Borrower Name Keyword

Borrower Phone Number

Borrower Email Address

Borrower ID Number

Borrower Number

Item Barcode (item out to borrower)

Selected index contains:

Borrowers' last names in alphabetical order. Type the last name first.

Search for:

OK

Cancel

Prev. Search

Example

Entry Aid

Normally you would search by name, although other indexes can be used.

Type the last name first. For example:

Search for:

fletcher norman

You don't need to use capital letters. Use spaces to separate the first and last names.

The results display alphabetically, with an arrow pointing to the name closest in spelling to your search:

List: Borrowers

Name	Phone	Location	BType	Birthdate	
Fletcher, John B	579-4488	sja	a	04/26/85	
Fletcher, Katelyn Rebecca Molly	765-9936	acs	a	06/17/93	katelyn-fletcher@hotmail.com
→ Fletcher, Wilbur	733-6975	sjh	a	07/02/51	wfletch102@aol.com
Fleury, Douglas B.	893-2056	gte	a	09/16/41	
Fleury, Nicholas Andrew D	306-261-7103	wst	a	02/22/96	
Fleury, Vanessa G	none	sjh	a	08/21/78	
Flewelling, Adam Norris	649-7157	wst	a	04/27/92	adamflewelling@yahoo.ca
Flight, Abigail Lynn	598-0808	elib	sr	09/09/00	Abigail_lynn@outlook.com
Flight, Alma Rosalie	596-2394	acr	a	02/02/50	aflight2009@hotmail.com
Flight, Alvina	596-3779	acr	a	05/11/69	alvina@eastlink.ca

OK

Cancel

For an unusual name, you might need to only type the last name and first letter of the first name:

Search for:

monsoon e

For more common names, it might help to type in the middle initial too:

Search for:

hickey james t

Advanced search techniques are useful if you think that a borrower record might already exist under a misspelled name.

**\*** (**asterisk**) replaces zero or more letters. For example:

cor\* will list borrowers whose last name begins with 'cor'

**?** (**question mark**) replaces a single letter: For example:

perr?n will return results for perrin, perron and perryn

If the borrower already has a record, then select it and click on **OK**. Press **[F6]** or select from top menu **Borrower > Edit Borrower** to open the record. Confirm details and issue a new library card if necessary. See the section [Editing a Borrower Record](#).

## Creating a New Borrower Record



### Printable Quick Guide: Borrower Registration

If the borrower you are searching for is not found then you will need to register them.

First close both pop-up search windows:

- click on **Cancel** or press **[Escape]** to close the borrower list window
- click on **Cancel** or press **[Escape]** to close the borrower search window

You should now be back at the Checkout window.

Open a new borrower record:

- press **[F5]** or select from top menu **Borrower > New Borrower**
- enter borrower details in the fields as prompted

Fields with an asterisk (\*) are required. The record cannot be saved unless they are completed correctly.

- click on **Page Down/Page Up** to move through the registration
- click on **Save** then **Close** when complete

## Registration Example

Click on the images to view them full size in a new tab. When finished, close the tab to return to this guide.

\* Last Name, First Name  \* Location  *Testonia Public Library* Codes

Barcodes    1 of 1

\* Barcode

Addresses    1 of 1

Addr. Type ☒ Perm ☐ Temp. Begin  End

Line 1

Line 2

Line 3

City, Prov  *Holyrood, NL* Codes

Postal Code  Mail type  *Domestic* Codes

Notice By ☐ Mail ☒ E-mail PreOverdue ☒ Email Address

E-Mail: Name

Allow Email Checkout Receipt ☐ Allow Print Checkout Receipt ☒

Phones    1 of 1

\* Phone

\* Type  *Email (all notifications are emailed)* Codes

Country Code

SMS Notice PreOverdues  Overdues  Holds  General

Pin# (4 digits)

\* Birthdate (mm/dd/yy)

Parent / Guardian

\* Staff Initials

\* BType  *Adult (18+)* Codes

BStat Classes (2 of them)    1 of 1

\* Stat Class  Codes

Approved ☒ \* Exp. Date

## Completing the Record

Completing most parts of the borrower record is straightforward, but there are a few areas that behave differently.

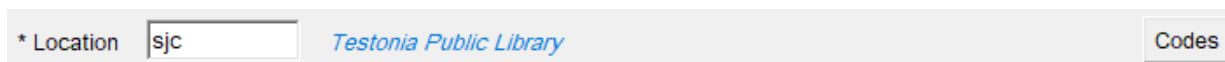
## Fields That Use Codes

Some fields use short codes. Type a code into the field and the matching description will appear in blue text on the right.

If you don't know which code to use then click on the **Codes** button to the right of the field to see a full list.

The following examples illustrate.

### Location

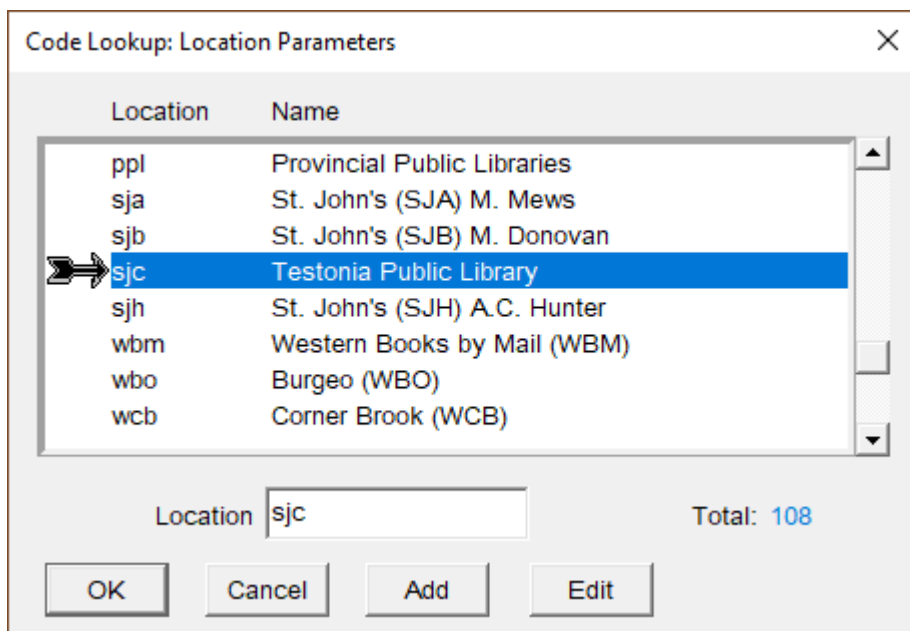


Field Label	Value	Display	Action
* Location	sjc	Testonia Public Library	Codes

This field uses a 3-letter code to represent the borrower's home library.

Type in a 3-letter code and Horizon will write the full name of the library next to it, in blue text.

When creating a new record, Horizon will autocomplete the code for your local library. If you need to change the location but don't know the code for the library, then you can click on the **Codes** button to view a list of valid codes.



Location	Name
ppl	Provincial Public Libraries
sja	St. John's (SJA) M. Mews
sjb	St. John's (SJB) M. Donovan
<b>sjc</b>	<b>Testonia Public Library</b>
sjh	St. John's (SJH) A.C. Hunter
wbm	Western Books by Mail (WBM)
wbo	Burgeo (WBO)
wcb	Corner Brook (WCB)

Location:  Total: 108

OK Cancel Add Edit

## City, Prov

City, Prov  [La Scie, NL](#)

This field uses codes to represent communities within the province.

- start typing the name of the town or city and pay attention to the location that appears in blue text
- stop when the required location is shown in blue
- don't use spaces

If you can't find a town or city, then click on the **Codes** button to view the full list and select from there. If a community is not in the list, then choose the nearest instead.

## Blinks

Phones   811 8055: e 1 of 2

\* Phone

\* Type  [Email \(all notifications are emailed\)](#)

Country Code

SMS Notice PreOverdues [N](#) Overdues [N](#) Holds [N](#) General [N](#)

Some areas of the record allow you to enter more than one set of details. These areas are called *Blinks*.

Each blink is surrounded by a thin indented rectangle and has its own **New** and **Delete** buttons. There is also a drop-down list that lets you select which set of details to edit or view.

Enter the first set of details by simply typing into the fields. To add another set of details, click on the **New** button. To remove a set of details, choose them from the drop-down list then click on the **Delete** button.

## Borrower Type

\* BType  [Adult \(18+\)](#)

Enter the borrower type into the *BType* field. The most common borrower types are shown below

and you can click on the **Codes** button to view the full list.

Borrower	BType
adult	a
young adult	y
child under 13	c
preschool	ps
visitor from outside province	va
child visitor	vc

## Borrower Stats

Two borrower stats need to be entered into the BStat blink. The first is age/service related and the second is geographical. The [Section-by-Section Guide](#) explains how to determine them. To record them:

- enter the first stat
- click on **New**
- enter the second stat

BStat Classes (2 of them)     
\* Stat Class  *Adult (18+)*

↓

BStat Classes (2 of them)     
\* Stat Class

↓

BStat Classes (2 of them)     
\* Stat Class  *Holyrood*

If you fail to enter both stats, then the record will not save. If you make a mistake in this section, the easiest way to rectify it is to click on the **Delete** button three or four times and then re-enter the stats.

# Section-by-Section Guide

Last Name, First Name		<ul style="list-style-type: none"><li>• capitalize the first letter of each name</li><li>• <b>last name first</b></li><li>• insert a comma between last &amp; first name</li><li>• always include a middle name if it exists</li><li>• hyphenated names should be entered as one unit, for example Stuart-Hargreaves, Yvonne</li></ul>
Location		<ul style="list-style-type: none"><li>• automatically filled by Horizon</li><li>• if you need to change the library the borrower is registered at you can just change the code</li></ul>
Barcode blink		<ul style="list-style-type: none"><li>• scan barcode from library card</li><li>• when a borrower loses their card, delete the old barcode and replace with the new one</li></ul>
Address  blink	Addr Type	<ul style="list-style-type: none"><li>• for residents use <b>Perm</b> (permanent)</li><li>• for temporary visitors use <b>Temp</b> (temporary)</li></ul>
	Lines	<ul style="list-style-type: none"><li>• use <b>mailing</b> address</li></ul>

City, Prov	<ul style="list-style-type: none"> <li>• only for communities in NL</li> <li>• keep typing while looking at the screen</li> <li>• stop when the town or city name appears</li> <li>• do not enter any spaces</li> <li>• if the name doesn't appear, use line 2 or 3 of the address and leave this field blank</li> <li>• for a location outside NL use line 2 or 3 of the address and leave this field blank</li> </ul>
Postal code	<ul style="list-style-type: none"> <li>• in caps</li> <li>• format: "Letter # Letter Space # Letter #"</li> <li>• example: <b>A0A 2R0</b></li> </ul>
Mail Type	<ul style="list-style-type: none"> <li>• one option, <b>dom</b>, automatically filled</li> </ul>
Notice By	<ul style="list-style-type: none"> <li>• select <b>email</b> or <b>mail</b> according to the borrower's preference</li> <li>• for email they need to check it regularly and ensure that their junk mail filter does not block mail from nlpl.ca</li> </ul>
PreOverdue	<ul style="list-style-type: none"> <li>• check this box if the borrower is receiving notices by email</li> </ul>
Email address	<ul style="list-style-type: none"> <li>• complete if receiving notices by email</li> <li>• use lower case</li> <li>• borrower will be notified by email about holds, and overdue items</li> </ul>
Email name	<ul style="list-style-type: none"> <li>• leave blank</li> </ul>

Allow Email Checkout Receipt	<ul style="list-style-type: none"> <li>• leave blank</li> </ul>	
Allow Print Checkout Receipt	<ul style="list-style-type: none"> <li>• leave checked</li> </ul>	
Phone blink	Phone	<ul style="list-style-type: none"> <li>• can insert multiple numbers by clicking on <b>New</b></li> <li>• first number should be the one to use if the borrower wants to be called about holds (instead of notices by email)</li> <li>• type <b>000-0000</b> if they have no phone</li> </ul>
	Type	<ul style="list-style-type: none"> <li>• <b>e</b> – for notifications</li> <li>• <b>p</b> – for notifications by phone</li> <li>• <b>n</b> – if they have no phone nor email</li> </ul>
PIN # (4 digits)		<ul style="list-style-type: none"> <li>• use the last 4 digits of the phone number</li> </ul>
		<ul style="list-style-type: none"> <li>• inform the borrower that it can be used with their card number to access online services</li> </ul>
Birth date		<ul style="list-style-type: none"> <li>• format: mm/dd/yy</li> </ul>
Parent / Guardian		<ul style="list-style-type: none"> <li>• <b>Last Name, First Name</b> of parent / guardian</li> <li>• accepts responsibility for items borrowed</li> <li>• notices will be sent to this person</li> </ul>

Staff Initials		<ul style="list-style-type: none"> <li>• required field</li> <li>• lets us check with the staff member who created the record in case there are questions about the registration</li> <li>• enter your initials if you edit an existing record</li> </ul>
BType		<ul style="list-style-type: none"> <li>• <i>borrower type</i> – see the table</li> </ul>
BStat  classes  blink	1 <sup>st</sup> BStat	<ul style="list-style-type: none"> <li>• age/service related</li> <li>• matches the Btype code but with a 1 in front</li> </ul>
	2 <sup>nd</sup> BStat  Press ' <b>New</b> ' before entering the 2 <sup>nd</sup> stat.	<ul style="list-style-type: none"> <li>• geographical</li> <li>• based on the borrower's place of residence, not the library's location</li> <li>• for a community in NL keep typing while looking at the screen</li> <li>• stop when the town or city name appears</li> <li>• do not enter any spaces</li> <li>• if the name doesn't appear use <b>dk</b></li> <li>• for a location in another province use <b>z</b> and use the postal designation for the province <ul style="list-style-type: none"> <li>◦ example: <b>znb</b> for New Brunswick</li> <li>◦ for outside Canada use <b>znc</b> (Not Canada)</li> </ul> </li> </ul>

# Registering a Temporary Borrower

Visitors from out-of-province are registered the same way as regular borrowers, with an additional step.

Record their temporary provincial address and include a Begin and End date.

You can record their out-of-province address in Line 3.

## Editing a Borrower Record

Borrower records can be edited to reflect changes in a borrower's personal details or simply to correct a mistake.

At the checkout window, scan their card or press **[F4]** and perform a search for the borrower.

Press **[F6]** or select from top menu **Borrower > Edit Borrower**. The borrower's record appears.

Borrower No.	195239	Regist. Date	12/05/2018	Last Updated	12/05/2018
No. of CKOs	0	Last CKO Date			
* Name	Cooper, Simon Bradley			* Location	sjc
Barcodes	New	Delete	23296003349153		
Barcode	23296003349153		Date Lost		

Edit the record as needed then click on **Save** and **Close**.

## Home Service

When editing an existing record, you will see a Home Services section. This is often empty and can be ignored.

Home Service	New	Delete	(New)
* Route			
Stop Number			
Last Visit Date		Next Visit	
Visit Comments			
Equipment			

## Replacing a Library Card

- press **[F4]** and search for the borrower
- press **[F6]** to enter their record
- delete the old barcode
- scan the new card into the Barcode field
- **Save** and **Close**

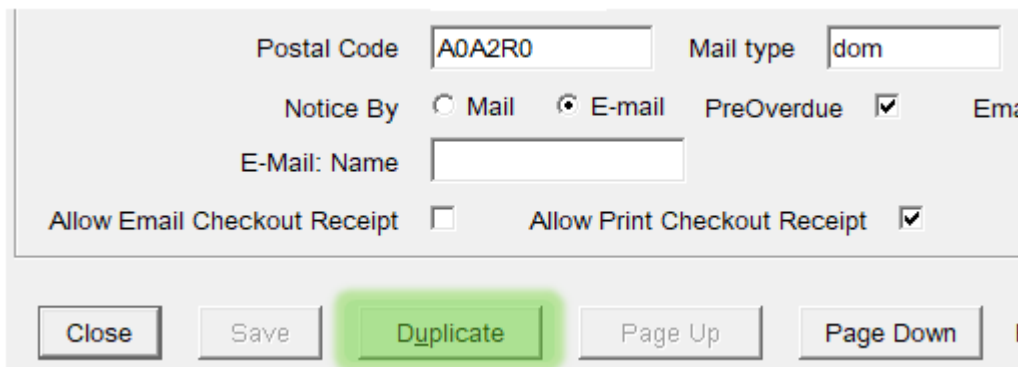
Borrower No.	195231	Regist. Date	03/13/2018	Last Up
No. of CKOs	31	Last CKO Date 02/27/2019		
* Name	Partridge, Alan Gordon			
Barcodes	New	Delete	2329600262622	
Barcode	2329600262622		Date Lost	

When changing the barcode, don't click on **New** or enter the Date Lost.

# Duplicating a Borrower Record

If you need to register a number of people who share a lot of details, such as a family living at the same address, then you can duplicate one of their borrower records. Many fields will be automatically filled in, saving time and effort.

To duplicate a borrower's record, click on the **Duplicate** button at the bottom of the first page of the record screen:



The screenshot shows a web form for a borrower record. The form includes several fields and checkboxes. The 'Postal Code' field contains 'A0A2R0'. The 'Mail type' dropdown is set to 'dom'. The 'Notice By' section has radio buttons for 'Mail' and 'E-mail', with 'E-mail' selected. The 'PreOverdue' checkbox is checked. The 'E-Mail: Name' field is empty. The 'Allow Email Checkout Receipt' checkbox is unchecked, and the 'Allow Print Checkout Receipt' checkbox is checked. At the bottom of the form, there are five buttons: 'Close', 'Save', 'Duplicate', 'Page Up', and 'Page Down'. The 'Duplicate' button is highlighted with a green border.

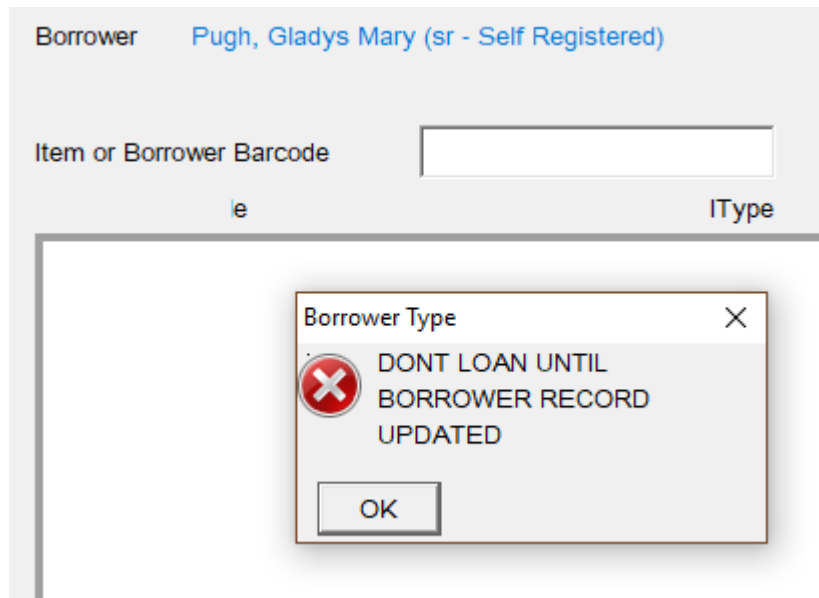
A new, partially completed borrower record will appear. Complete the record, carefully reviewing each pre-completed field.

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## Self-Registered Borrowers

Self-registered borrowers have registered online and received a library card through the mail. Before they can borrow physical items, we need to verify their identity and contact details.

When a self-registered borrower tries to borrow physical items for the first time and you scan their card, Horizon will prompt you to update their record:



To complete verification:

- press **[F6]** to enter the borrower record
- change location from 'elib' to your site
- confirm the borrower's name, address, email, phone number and date of birth
- enter your initials in the staff initials field
- change the borrower type from SR to the correct code
  - for example 'a' for an adult
- fix the borrower stats:
  - delete the '1sr' stat
  - add a 1<sup>st</sup> stat for the borrower type
    - for example '1a' for an adult
  - add a 2<sup>nd</sup> stat for the borrower's address location
    - for example 'avo' for Avondale
- **Save** the record
- click on **Clear** on the Checkout screen
- re-scan the borrower's library card

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## Borrowers Registered Before Automation

Some borrowers who registered before Horizon was introduced will need their records updated,

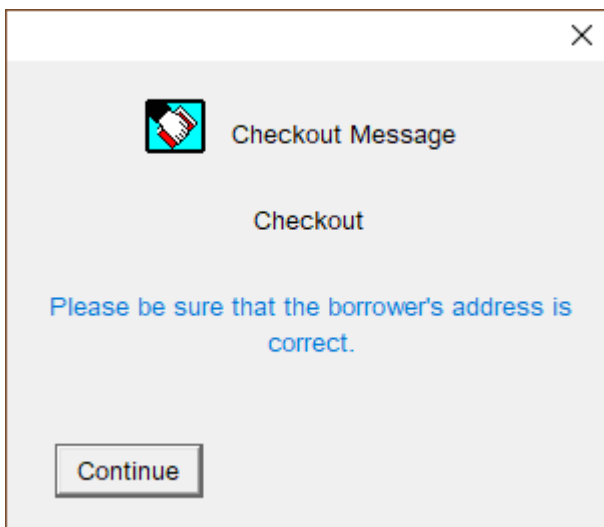
similar to self-registered borrowers.

These borrowers may have zero, one or many borrower stats currently recorded. The easiest way to correct and complete their records is to delete all existing borrower stats and then re-enter them.

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## Annual Details Check

Once per year, when you scan a borrower's card or **[F4]** search for them, Horizon will prompt you to check that the borrower's recorded address is correct:



Click on **Continue** and the borrower's record will appear in a pop-up window:

Borrower No. 195239    Regist. Date 12/05/2018    Last Updated 12/05/2018  
 No. of CKOs 0    Last CKO Date  
 \* Name Cooper, Simon Bradley    \* Location sjc    Codes  
 Barcodes — New — Delete — 23296003349153 — 1 of 1  
 Barcode 23296003349153    Date Lost  
 Close    Save    Duplicate    Page Up    Page Down    Page 1 of 6

Carefully review the record and update where necessary. Save when complete.

Horizon does not automatically update the borrower type or borrower stats as a borrower ages. So if a borrower has aged from, say, a young adult to an adult, then you will need to update their btype and bstat fields.

## Deleting a Borrower

Occasionally we discover that a borrower has been recorded twice into the system or has died. If the surplus account does not have outstanding items or fines, then it can be deleted:

- search for the borrower
- press **[F6]** to enter their record
- select from top menu **Borrower > Delete Borrower**

Do not delete a borrower record for any other reason.

If the account has outstanding items or fines, then it cannot be deleted. Contact your regional office for assistance.

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# Guest Computer Users

A person who only wants to use a public computer can do so if they show an ID and write their name, address and date of visit in the [Guest Computer Users Log](#).

Staff should log onto MyPC for the patron using a Guest Computer User Card. Do not hand the card to the patron.

Please refer to the [MyPC Staff User Guide](#) for further guidance, including on how to create a guest computer user card. The guide can be found in the staff portal, under Staff Tools > Training Guides.

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