

Registering a Chicago Reciprocal Borrower in WorkFlows

Prior to creating a new card for a Chicago Public Library Reciprocal Borrower, begin by searching WorkFlows thoroughly for an existing user record. If you find an expired user record in SWAN, you will need to verify the user's status at their home library. Verify the user is in good standing on the Chicago Public Library website www.chipublib.org. You will find a link labeled "Reciprocal Verification" in the bottom right corner of the webpage. Click on the link and enter the agency number for your library. If you do not know the agency number for your library, please contact SWAN support.

Once you have verified their status you should update any information on SWAN, especially the expiration date, in "Modify User." Please note: You do not need to verify the status of a Chicago Public Library reciprocal borrower with their home library every time you circulate materials to them as long as their status on SWAN is "OK" and their card has not expired.

If the user is not in good standing or the card has expired, the patron will need to return to the home library in Chicago before a card can be issued in SWAN.

If no record is found in SWAN for the user – and they are in good standing and their card has not expired - create a new user record. SWAN recommends that you ask the user for 2 forms of ID – a picture ID including their current address and their current library card before creating a card for them. To register a new user click on the "User Registration" wizard and complete the following:

- Begin by entering the user ID from their Chicago Public Library card.
- Under the Basic Info tab, choose CHICAGO_P from the User Profile dropdown.
- Under the Basic Info tab in the Library field, select ILL_LIBS, not your library.
- Under the Basic Info tab, according to your local library practice choose the appropriate Charge History rule from the dropdown.
- Under the Privileges tab, enter the expiration date from CPL website verification.
- Under the Demographics tab, in the Non-SWAN RB field, select CHICAGO PL.
- Under the Demographics tab, indicate the user's notice preference in the Notice Preference field.
- Under the Demographics tab, enter the user's birthdate (required field).
- Also, under the Demographics tab, you can enter a Language preference for the user. The language preference field allows patrons to receive their notices in foreign languages. At present, SWAN generates notices in Spanish and Polish in addition to English.
- Following local practice, complete any other fields under the Demographics tab.