

Registering a Non-SWAN Reciprocal Borrower in WorkFlows

Prior to creating a new card for a Non-SWAN 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. 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 Non-SWAN 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 you do not find a user record in SWAN for the patron, you must contact the user's home library to verify the patron is in good standing. If the library is closed, you can create the user record using a shortened expiration (privilege) date. Depending upon your library policy, you may choose to limit the amount of materials you circulate to them at this point. You will need to call the user's home library to verify their status the following day. Using "Modify User" update the user's record in Workflows, including the patron's actual expiration date. 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.

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

If no record is found in SWAN, and the user is in good standing and their card has not expired, create a new user record.

Begin to create the new record using the "User Registration" wizard:

- Enter in Workflows the User ID from their library card.
- Under the Basic Info tab in the "User Registration" wizard, choose NONSWAN_RB 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 given by the user's home library.
- Under the Demographics tab in the Non-SWAN RB field, select the user's home library. If the user's home library is not listed in the dropdown choose "Unknown". You will need to open a ticket with SWAN to request that the library is added to the dropdown. Once the library is added to the dropdown, you will be notified and you can complete the user's registration using the "Modify Users" wizard.

- 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.