

Replacement Library Card Procedures

STAFF GUIDE



MARIGOLD
LIBRARY SYSTEM

JANUARY 2023

CARD REPLACEMENT CHECKLIST

Before replacing a patron's library card, ask the patron the following questions:

1. Do you use OverDrive and/or cloudLibrary?
2. Do you use the Freegal Music mobile app?
3. Do you use hoopla?
4. Have you registered your library card with ME libraries?

If the answer to any of these questions is yes, please see the eResources & Digital Services section.

UPDATING THE PATRON'S RECORD

Once you have completed the above checklist, you can issue the patron a new library card. This can be done in either Polaris or Leap.

Leap

1. Open the Patron Record and select Registration.
2. Copy the old barcode and paste it into the Former Barcode field.
3. Delete the old barcode from the Barcode field and scan the new barcode into the Barcode field.
4. Save the Patron Record.

NOTE: The old barcode is saved only for future reference. Once the updated record is saved, the patron will no longer be able to login to TRACpac or eResources with the old barcode.

Polaris

1. Open the Patron Record and select the General Tab.
2. Copy the old barcode and paste it into the Former Barcode field.
3. Delete the old barcode from the Barcode field and scan the new barcode into the Barcode field.
4. Save the Patron Record.

NOTE: The old barcode is saved only for future reference. Once the updated record is saved, the patron will no longer be able to login to TRACpac or eResources with the old barcode.

eRESOURCES & DIGITAL SERVICES

Access to the following eResources/Digital Services will be impacted by changing to a new barcode:

- OverDrive/cloudLibrary
- Freegal Music (mobile app only)
- hoopla
- ME Libraries

Follow the instructions for each before updating the patron's account with a new barcode.

OverDrive & cloudLibrary

To save a patron's Overdrive and cloudLibrary information (such as items out, holds, etc.), Library Staff should fill out the OverDrive and cloudLibrary Barcode Merge request form at <https://marigold.ab.ca/Services-Support2/Library-Staff/Member-Library-Forms>.

Freegal Music (mobile app only)

Before updating a patron's barcode

Patrons who download Freegal music using the mobile app need to back up their files to a computer or those files will be lost once their new barcode has been saved in Polaris. Lost files cannot be recovered.

For instructions on how to transfer downloaded Freegal music from a mobile device (iOS or Android) to a computer, please direct patrons to <https://marigold.freegalmusic.com/settings/faq>.

Hoopla

Patrons who use hoopla will need to update their account information in hoopla with their new barcode.

1. Login to hoopla.
2. Click on Settings and select Library settings.
3. Enter the new barcode under Library Card Number and click Save.

This can be updated any time after switching to a new barcode, but must be updated before the patron checks out hoopla items. No information will be lost when the barcode is changed.

ME LIBRARIES

Patrons who have registered through the ME Libraries service will need to re-register once they have a new barcode.

Once logged in at <https://melibraries.ca>, patrons will be prompted to update their information with libraries/systems they had previously registered for. Updates are not immediate and may take several days to process. Patrons may receive an error message stating that their information is invalid during the update process.

Alternatively, patrons may travel to ME library locations in person and request their information be updated – please note that this is at the discretion of each library and photo ID and their library card may be requested.

TAL CARDS

TAL cards are for patrons wishing to borrow from an academic or special library within Alberta.

Replacement Library Card Procedures

To issue a TAL card:

1. Fill out a cardstock TAL card with the patron's name, issuing library (your library), and expiry date from their TRAC account.
2. Have the patron sign the card.
3. Upon their first visit to an academic or special library, the patron will have library staff there register them by placing a barcode on the TAL card.

For more information on TAL cards, visit <https://thealbertalibrary.ca/tal-card>.