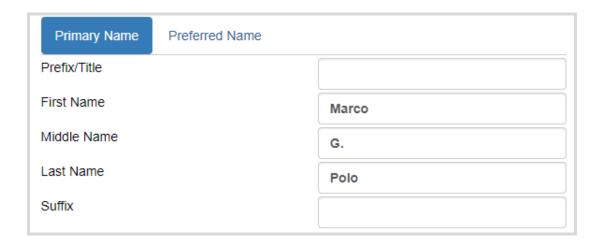


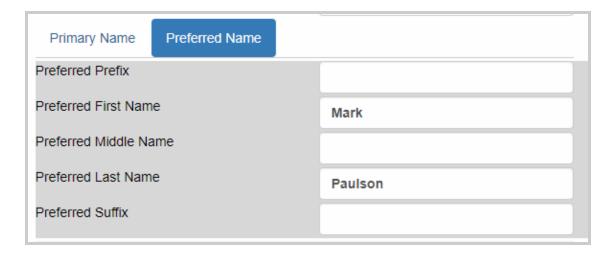
Patron Names

Primary and Preferred Names

By policy, we use the patron's legal name verified by driver's license or other source. We now refer to that as the **Primary Name.**



We also have a way to also enter a patron's preferred name. This is helpful for patrons who are changing their name due to marriage, divorce, gender identity or personal preference.



You only need to add Preferred Name elements that differ from the primary name -- if **Marco Polo** is now known as **Mark Polo**, we would enter **Mark** as the **Preferred First Name** and leave the other boxes blank.. Searches on the name elements will search both the primary and preferred names -- we could search for either **Marco** or **Mark** as the first name and find this patron.

Patron Keywords

In addition to the preferred name elements, there is also a box to add searchable patron keywords. This is a good place to put individual name elements like nicknames, former names, etc. All patron name elements (primary and preferred) plus the name keywords are searched in a patron keyword search. In this example, **Marco Polo / Mark Paulson** was using Marcus as his first name for a while, so we record that as a name keyword.



Both the primary and preferred names appear in the patron preview in the staff client. The tag icon appears if there are patron keywords -- hover over the icon displays the keywords, as shown here.



The preferred name appears on the patron's account in the catalog and on notices.

