



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**.

Primary Name	Preferred Name
Prefix/Title	<input type="text"/>
First Name	<input type="text" value="Marco"/>
Middle Name	<input type="text" value="G."/>
Last Name	<input type="text" value="Polo"/>
Suffix	<input type="text"/>

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.

Primary Name	Preferred Name
Preferred Prefix	<input type="text"/>
Preferred First Name	<input type="text" value="Mark"/>
Preferred Middle Name	<input type="text"/>
Preferred Last Name	<input type="text" value="Paulson"/>
Preferred Suffix	<input type="text"/>


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.

Name Keywords	Marcus
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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.

Polo, Marco G. 
<div style="border: 1px solid gray; padding: 2px;">Name keywords: Marcus</div>
Paulson, Mark (Preferred)

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

Mark Paulson	Messages	Account	Lists	Logout
0 Checked Out	1 On Hold	0 Ready for Pickup	\$0.00 Charges	