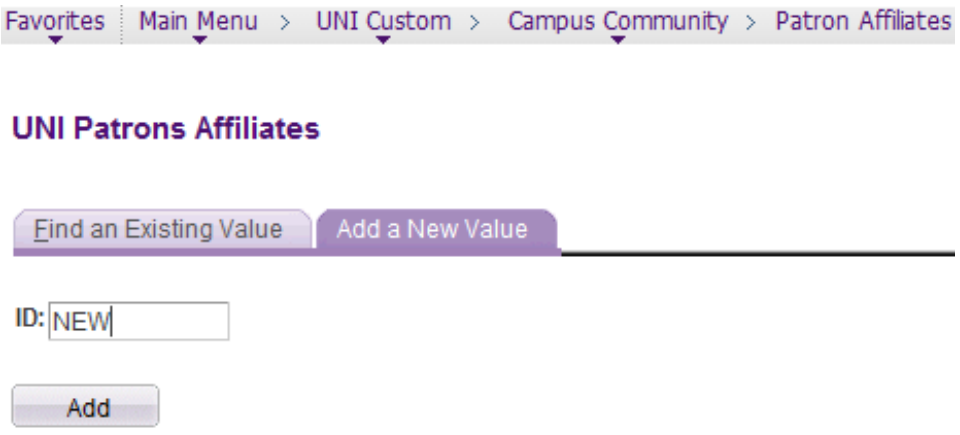# Adding a UNI Patron to the System
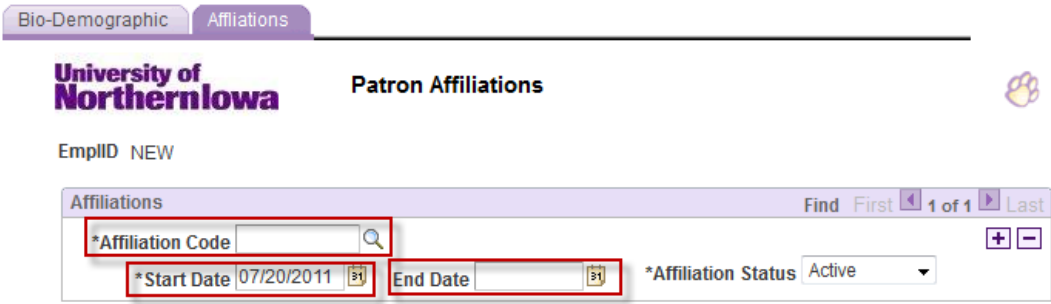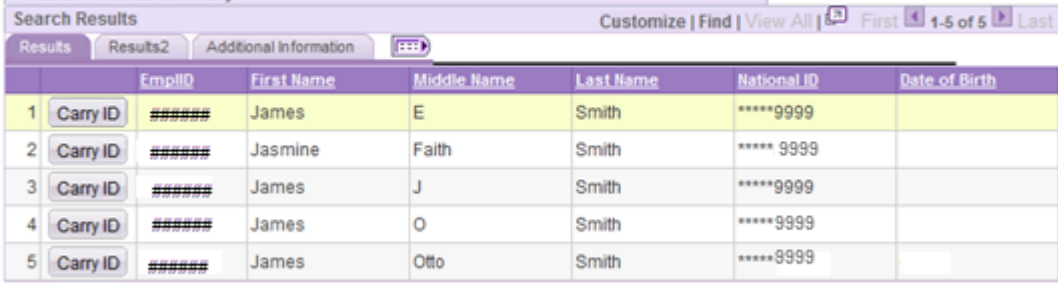
Purpose: To add a UNI Patron to the system, you must:
- Create a personal information record for that patron, including bio-demographic information
- Assign an affiliation to the patron

When adding a patron, the system will run **Search/Match** to determine if a record already exists for that individual. If a record already exists, you may simply assign the affiliation. Do not create another record if the record already exists, this results in duplicate records.

Step	Action
1.	Navigate to the **Add/Update a Person** page. Select **Main Menu › UNI Custom › Campus Community › Patron Affiliates** Favorites | Main Menu > UNI Custom > Campus Community > Patron Affiliates **UNI Patrons Affiliates** Find an Existing Value | Add a New Value ID: NEW Add *Note:* If you know the individual already exists (you have their U-ID), click the **Find an Existing Value** tab to search for the individual. Skip to step 4.
2.	Click the **Add** button on the **Add a New Value** tab. *Result:* The Bio-Demographic tab displays.

Step	Action
3.	On the ***Bio-Demographic*** tab, complete the following: **SSN** – This field is not required. If you have the Patron's social security number, enter it here. ***Note:*** This number will not display once entered. It becomes masked. **Date of Birth** – Required field. **First Name** – Required field. **Middle Name** – Optional field. **Last Name** - Required field. **Gender** – Optional field. **Marital Status** – Option field. **Address** – Required fields.

Step	Action
4.	Click the *Affiliations* tab. Complete the following: *Bio-Demographic* / *Affiliations* **University of NorthernIowa** **Patron Affiliations** EmplID NEW Affiliations Find First 1 of 1 Last *Affiliation Code *Start Date 07/20/2011 End Date *Affiliation Status Active • **Affiliation Code** – Enter or select as appropriate (e.g. PLIB: Patron- Library) • **Start Date** – Required field. Defaults to today's date, may be updated. • **End Date** – Optional field. If no end date is entered, the patron affiliation continues indefinitely.
5.	Click the **Save** button. ***Result:*** The system performs the Search/Match process and returns any possible matches that already exist in the system. **Search Results** WARNING: Potential duplicates were found - this person may already exist in the database. Refer to the list below for possible matches to the person you are adding. After you click the return button at the bottom of the page, you'll be asked whether you want to continue adding this new person, or cancel this operation. ▷ Match Criteria ▷ Search Results Summary Search Results Customize | Find | View All | First 1-5 of 5 Last *Results* / *Results2* / *Additional Information* |	EmplID	First Name	Middle Name	Last Name	National ID	Date of Birth
---	---	---	---	---	---	---
1 Carry ID	######	James	E	Smith	*****9999	
2 Carry ID	######	Jasmine	Faith	Smith	***** 9999	
3 Carry ID	######	James	J	Smith	*****9999	
4 Carry ID	######	James	O	Smith	*****9999	
5 Carry ID	######	James	Otto	Smith	*****9999		 Return
6.	Use the **Show All Columns** button to view more details for the possible matches.

Step	Action
7.	Important! Review the possible matches closely before taking action.

If…	Then…
a match exists	• Click the **Carry ID** button next to the record and then click the **Return** button. • Assign the Affiliation (Click the *Affiliations* tab, select the appropriate **Affiliation Code**, enter date parameters if applicable, and click the **Save** button.)
a match does not exist	• Click the **Return** button. Click the **OK** button. • The system has now assigned a U-ID for the patron • Assign the Affiliation (Click the *Affiliations* tab, select the appropriate **Affiliation Code**, enter date parameters if applicable, and click the **Save** button.)

Step	Action
8.	Click the **Save** button.

Viewing Patron Affiliations
Main Menu > Campus Community > Affiliations > Verw Person Affiliations