Patron Merge

Two records may exist for the same patron. For example, a patron may have a record under a new name but still have a record under a former name. You can merge the patron records to resolve the issue. You may not merge the following records: Fisher, Roxbury Community College (RCC) and MassDOT with another MBLN card. Patrons may have separate cards for these institutions. You must verify that the patron records you wish to merge belong to the same individual. It is not uncommon for patrons may have the same primary name such as mothers and daughters or granddaughters or for sons to Juniors or Seniors.

From Patron Registration:

2. Search for the Patron Record.
3. Double click on the correct record to open Patron Registration.
4. Select Tools, Merge with Patron.
5. Click on Select record to delete.
6. The Find Tool will open. Search for and select the correct duplicate patron record.
7. Double click on the correct record to add to the Patron Merge box.
8. Once you have confirmed the information is accurate:
   a. The Primary record is the one you want to retain.
   b. Neither record is an institutional record.

9. Click on **Merge**.

10. Click **OK** to continue with the merge.

11. The Secondary barcode will automatically be placed in the Former barcode field in Patron Registration.

12. Go to the General workform in Patron Registration and delete the former barcode.

13. A non-blocking note will be placed on the Patron Status workform indicating the records have been merged (Do not delete this message).

**Blocks to Merging Records**

1. If the secondary record has any of the following conditions:
   a. Do not delete option is checked.
   b. Collection agency block.
   c. Attached hold requests with a status of Held or Shipped. The message indicates that the holds must be cleared before merging.
   d. ILL requests of any status. The message indicates that the requests must be cleared before merging.
   e. Linked to any course reserve records. The message indicates that the patron record must be removed from all linked courses.

2. The merge is blocked and a message is displayed. Take appropriate action to clear the block.