

**Circulation Advisory Council**  
**4/5/2023 (online)**  
**Minutes**

**Present:** Rob Carle (UHLS), Molly Davis (VOOR), Kirsten Heller (RCSC), Pam Jacobson (SNLK), Lisa Pitkin (GUIL), Sylvia Taylor (BETH), Joe Thornton (UHLS), Lauren Vincent (GUIL), Virginia Wescott (TROY)

**Preferred Name - what is it and how do/should we use it?**

Email from Deanna DiCarlo (used, I hope with her permission):

*The "preferred name" field came out of a library services for LGBTQIA patrons training I organized when I worked for UHLS--the trainer highly recommended we create a preferred name (or chosen name) field for patron records when someone's legal name does not match their chosen name. The reasons are to affirm someone's gender identity without question and to support our transgender patrons.*

*If my memory is correct, Sierra had an option for an "alias" field that we were going to use, but we were going to change the text of the field to "preferred name" or "chosen name" (for what I think are obvious improvements over "alias"). I believe the inclusion of that field was recommended to CAC by ASAC and had traction in the DA as well.*

*As that was over six years ago, there may be a better way to accomplish the same thing--some libraries allow whatever name patrons go by to be input into the "name" field--it is a matter of training staff. I have no doubt you all will do everything in your power to continue to support trans members of our communities. I have CCed Judith as Equity Committee Chair. Thank you--*

... and Lauren Vincent followed up with:

*At Guilderland, we shelve our hold pickups out on the public floor. We use the preferred name to go on the bottom of our hold notices that we place in the hold items. The patron can then easily find their hold on our hold pickup shelves.*

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## Discussion:

- Virginia described the ‘Preferred Name’ experience at TROY. They tried to use it a year ago but it skewed the Patron display in *Sierra* so much that they gave up on it.
- Joe asked if we could just enter a patron’s preferred name as their “Name” in *Sierra*, but Virginia said no, they’re required to use the legal name.
- Sylvia said that at BETH they ask the patron if it’s okay to use her preferred name as “Name” with the caution that the preferred name will display on all correspondence from the library.
- Virginia said that at TROY they enter the legal name followed by the *Preferred Name* in parentheses, e.g. “Smith, John (Preferred Name Amy),” and they also caution the patron that that full name (legal and preferred combined) will display on all correspondence.
- Lauren said that this issue hasn’t come up at GUIL.
- Lisa asked if *Preferred Name* could be added to the Patron templates in *Sierra*. It can, and Joe said that Lisa should ask Jon Lorang to make that change.
- Joe asked if we could replace another field in the Patron Display with *Preferred Name*. Sylvia suggested *Birth Date* but Virginia said that TROY needs that field.