

MEMBERSHIP MANAGEMENT PROCEDURE

Prepared By:-	Approved By:-
	
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1.0 OBJECTIVE

To explain the membership management process according to library's requirements.

2.0 SCOPE

This procedure covers membership management of IIUM and external community.
The membership management process consists of:

- 2.1 New registration.
- 2.2 Members' records updating and maintenance.
- 2.3 Members' records clearance.

This procedure applies to all campus libraries.

3.0 ACCOUNTABILITY

The following offices are accountable for the procedure:

- 3.1 Collection & Client Services Department – Documents
- 3.2 Client Services Section - Documents
- 3.3 Circulation and Loans Unit – Operations
- 3.4 Campus Libraries - Operations

4.0 ABBREVIATION

- LA : Library Assistant
- LMS : Library Management System
- SLA : Senior Library Assistant

5.0 REFERENCE

5.1 Internal Document

- 5.1.1 Borrowing and Returning of Library Materials Guidelines (UIAM.LIB.GUI.100-1/7/8)
- 5.1.2 Manual of Creating Member's Record in Koha (UIAM.LIB.MAN.100-7/3/1)
- 5.1.3 Manual of Library Membership Activation (UIAM.LIB.MAN.100-7/3/1)
- 5.1.4 Manual of Updating Member's Record in Koha (UIAM.LIB.MAN.100-7/3/1)
- 5.1.5 Manual of Staff Exit Clearance (UIAM.LIB.MAN.100-7/3/1)
- 5.1.6 Membership Application for External Members Form (UIAM.LIB.100-1/7/8)
- 5.1.7 Missing, Lost and Damaged Library Materials Guidelines (UIAM.LIB.GUI.100-1/7/8)
- 5.1.8 Library Charges Guidelines (UIAM.LIB.GUI.100-1/7/8)
- 5.1.9 Library Membership and Access Guidelines (UIAM.LIB.GUI.100-1/7/8)
- 5.1.10 Loan Overdue and Fines Guidelines (UIAM.LIB.GUI.100-1/7/8)

6.0 RECORD RETENTION PERIOD

6.1 5 Years

7.0 PROCESS FLOW

7.1 Registering new members (For staff, students and external members)

Responsibility

LA/SLA

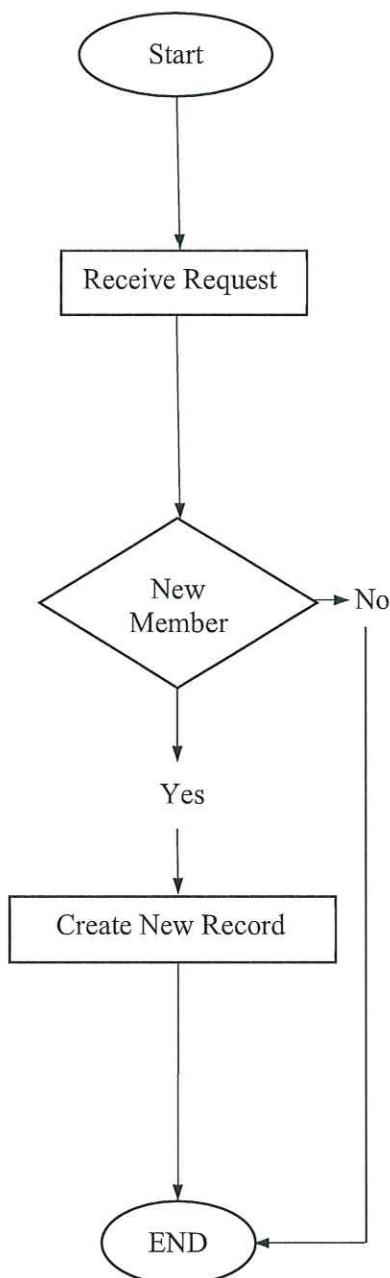
LA/SLA

LA/SLA

LA/SLA

LA/SLA

Flow Chart



Remarks

1. Receive request

- 1.1 External Members:
Received membership applications from clients through the application form or email.
- 1.2 Library Client (Staff/Student):
Assist staff and students in activating their Library membership by guiding them through the first-time Library Account login process.
- 1.3 Refer to:
 - 1.3.1 Membership Application for External Members Form. (UIAM.LIB.100-1/7/8)
 - 1.3.2 Library Membership Access Guidelines (UIAM.LIB.GUI.100-1/7/8)
 - 1.3.3 Manual of Library Membership Activation. (UIAM.LIB.MAN.100-7/3/1)

2. Verify request

- 3.1 In the Library Management System, search the client's name in the Patrons window for verification.
- 3.2 Confirm the client is a new applicant when his/her name is not found in the library system.
- 3.3 If the client's record already exists, follow Process Flow 7.2.

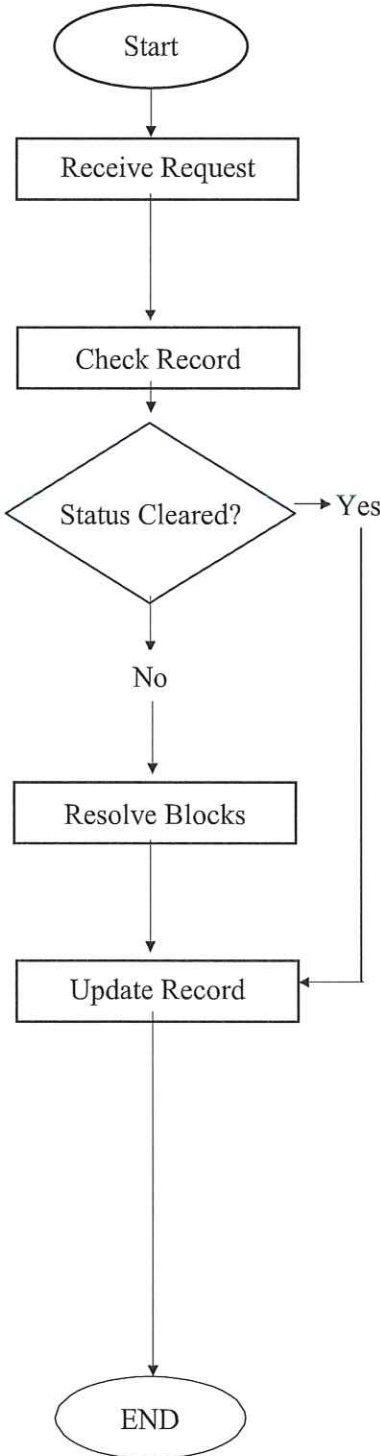
3. Create new records (for external members)

- 3.1 In the library system, open the Patrons window and select new patron. Refer to:
 - 3.1.1 Manual of Creating Member's Record in Koha (UIAM.LIB.MAN.100-7/3/1)

4. Housekeeping

- 4.1 File the form accordingly

7.2 Updating and Maintaining Member's Record

Responsibility	Flow Chart	Remarks
	 <pre> graph TD Start([Start]) --> ReceiveRequest[Receive Request] ReceiveRequest --> CheckRecord[Check Record] CheckRecord --> StatusCleared{Status Cleared?} StatusCleared -- Yes --> UpdateRecord[Update Record] StatusCleared -- No --> ResolveBlocks[Resolve Blocks] ResolveBlocks --> UpdateRecord UpdateRecord --> END([END]) </pre>	1. Receive request 1.1 Receive requests from member via membership application form/verbal. 1.2 Request member to provide related documents/evidence (if applicable – case by case). Refer to Library Charges Guidelines (UIAM.LIB.GUI.100-1/7/8)
LA/SLA		
LA/SLA		2. Check member's record 2.1 In the LMS, search the member's name in the Patrons window for verification.
LA/SLA		3. Check outstanding 3.1 Check outstanding transactions that need to be resolved, e.g.: 3.1.1 Overdue fines: refer to Loan Overdue and the Fines Guidelines (UIAM.LIB.GUI.100-1/7/8) 3.1.2 Lost materials refer to Missing, Lost and Damaged Library Materials Guidelines (UIAM.LIB.GUI.100-1/7/8)
LA/SLA		4. Remind and request members to resolve the outstanding transactions. 4.1 Refer to Library Charges Guidelines (UIAM.LIB.GUI.100-1/7/8)
LA/SLA		5. Update member's records 5.1 In the LMS, edit/change/add relevant information based on the details provided by the member at the Edit window tab in Koha. 5.2 Refer to: Manual of Updating Member's Record in Koha (UIAM.LIB.MAN.100-7/3/1) 5.3 Put notes and staff initial in messages whenever necessary. Save the data entry
LA/SLA		6. Housekeeping 6.1 File the form accordingly.



7.3 Processing Membership Clearance (Graduation, Withdrawal, Termination, Retirement, etc.)

Responsibility

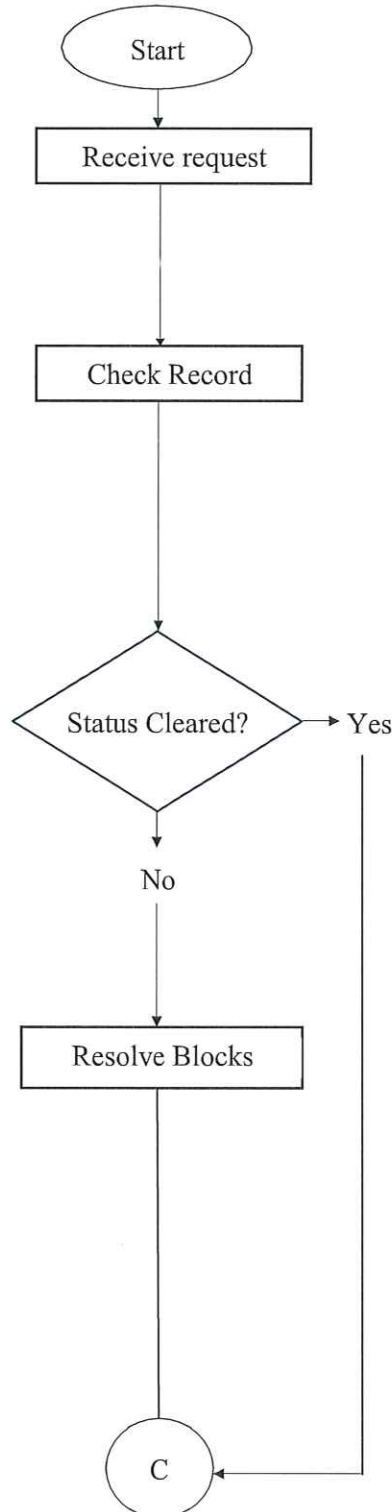
LA/SLA

LA/SLA

LA/SLA

LA/SLA

Flow Chart



Remarks

1. Receive requests from members via:

- 1.1 Printed clearance form
- 1.2 Email/Phone/Online Form

Note:

Starting March 2024, the Automated API Clearance System will automatically clear student records in the IIUM Student Clearance System if their Koha records are clear.

2. Check member's record

- 2.1 In the LMS, access the Patrons module and search for the member's name using the Search patrons function to verify the member's record.

Note:

Double-check by IC or passport number and staff/student ID.

- 2.2 If not found proceed to step 4.

3. If found, check outstanding transactions that need to be resolved, e.g.:

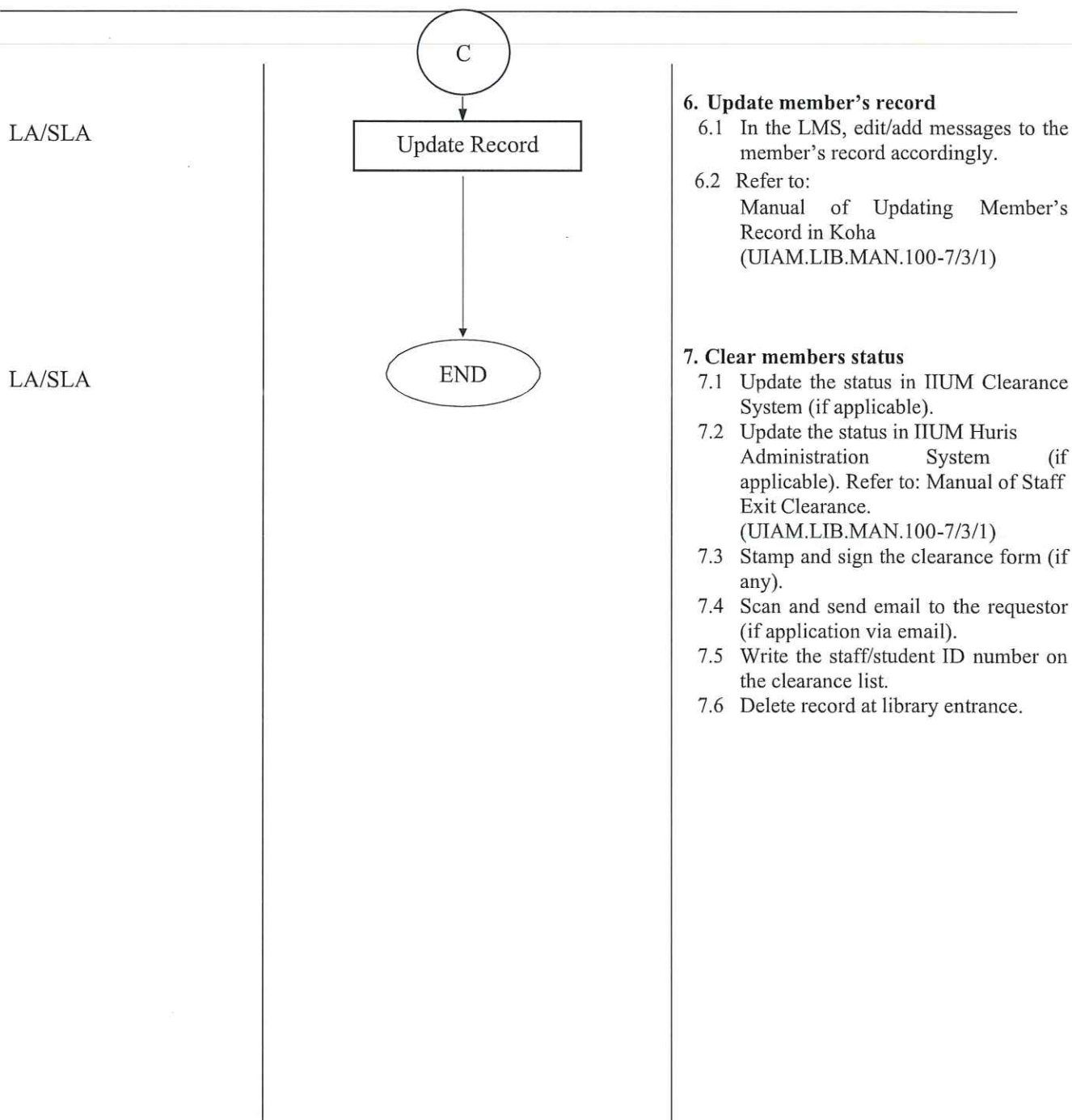
- 3.1 Overdue fines: refer to Loan Overdue and Fines Guidelines (UIAM.LIB.GUI.100-1/7/8)
- 3.2 Lost materials: refer to Missing, Lost and Damaged Library Materials Guidelines (UIAM.LIB.GUI.100-1/7/8)

4. Remind and request members to resolve the outstanding transactions by:

- 4.1 Returning book(s) on loan and/or
- 4.2 Paying fines and/or
- 4.3 Replacing book(s) or paying the replacement cost.
Refer to Library Charges Guidelines (UIAM.LIB.GUI.100-1/7/8)

Note:

If the member is unable to settle the outstanding transactions at this juncture, request him/her to come later to settle the said transaction and proceed with the next clearance process.



ANNEXURE

1.0 TERMINOLOGIES

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| 1.1 | Blocks | : System-generated blocks or pop-up messages that prevent the completion of membership management transactions. |
| 1.2 | Circulation Counter | : Membership management, borrowing and returning counter complete with the Library Management System. |
| 1.3 | Fines | A charge imposed against a library client by the library for late returning and unreturned of a borrowed item after its due date. |
| 1.4 | Library Management System | : Koha integrated Library Management System. |
| 1.5 | Lost | : A status in the Library Management System where the library materials are lost while on loan. |
| 1.6 | Members/borrowers/clients/patrons | : All Dar al-Hikmah Library registered clients, can be used interchangeably. |
| 1.7 | Members record | : Records in the library management system that contain members' details which are automatically linked to their loan records. |
| 1.8 | Membership record clearance | : Staff/students clear off their library records before leaving the university e.g. retirement, graduation, withdrawal, termination, etc. |
| 1.9 | Automatic API Clearance System (AACS): | An advanced approach to managing API access and security. It automates many of the processes involved in API clearance, enhancing efficiency and reducing the risk of human error. |
| 1.10 | Overdue | : Library materials not returned after the due date. |
| 1.11 | Staff/Student/External Members ID | : Staff/student/external members' cards issued by the university's appropriate authority. |