# Best Practices for Authority Records in the Field of Religion

**Prepared by the Joint Taskforce on Best Practices for Authority Records in the Field of Religion**

**2016**

## Preface:

At the 2013 Annual Conference of the American Theological Library Association (ATLA), the Technical Services Interest Group (TSIG), at its business meeting, authorized the formation of a Best Practices Taskforce for Religion to draft a best pactices document which would provide guidance to catalogers preparing authority records for entities in the field of religion. The Taskforce was requested to solicit members from the Catholic Library Association (CLA), the Association of Christian Librarians (ACL) and the Association of Jewish Libraries (AJL). Representatives from CLA and ACL have been added to the Taskforce.

At the 2014 ATLA annual Conference, TSIG further authorized the Best Practices Taskforce to prepare a Thesaurus of Religious Occupational Terms, to accompany this guide and be of use in the 374 field.

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# Introduction:

The purpose of this guide is to provide catalogers preparing authority records in the field of religion with suggested best practices relating to the optional fields in authority records. The goal of these suggestions is to bring some consistency and uniformity to the creation of new authority records and the upgrading to RDA of older records. These guidelines do not take the place of cataloger's judgment in the creation and updating of records, but simply provide guidance in choosing whether or not to include particular information in a formal area. These guidelines also are not intended to replace PCC best practice guidelines, and should be disregarded if the PCC has issued a best practice which conflicts.

## General Guidelines

Provide all verifiable data deemed significant to:
> Disambiguate the name
> Serve future research needs

Consider future researchers searching on data in several fields at the same time when deciding what information to provide and how to provide it. Ex.: Searching for female teachers of Reformation history could be done by combining a search of the 372, 373, 374 and 375 fields. No one field has to indicate all of these characteristics by itself.

Justify all data by use of the 670 field or the $v, $u conventions.

# Personal Names

**046 (Coded Dates):**
> Always provide dates whenever known, including month and day, if available. Enter the information even if it is not present in the Authorized Access Point for the person. If birth and death dates are not known, include activity dates for pre-twentieth century persons. Always provide if used in the 1XX. Use edtf format except for centuries.
> Justify all elements in the 670 field.

**368 (Other Attributes)**:
> **$c:** Note such attributes as veteran status, etc., if considered significant. Use established terms if possible. Provide other terms, such as Spirit, Saint.
> **$d**: Routinely provide rank or title, such as Professor, Reverend, Doctor, etc., appearing with the name on title pages or reference sources (record exactly as found). Include academic degrees, religious order affiliation, etc., appearing with the name, also in $d. Do not record profession or occupation in $d, prefer field 374.
> Justify all elements in the 670 field.

**370 (Associated Place):**

Provide place of birth and/or death if readily available. Provide place of residence, associated countries, and other significant places in the person's life, if available. No need to search if unavailable, unless needed to assist identification.  Use established place names if available.
Justify all elements in the 670 field.

**371 (Address):**
Provide an email address if publicly available, such as on the cover blurb of the book or on the internet. Do not provide a physical address for a living person, even if publicly available.
Justify all elements in the 670 field.

**372 (Field of Activity)**:
Provide as many fields of activity as appropriate, using established terms such as from LCSH or other lists. Include amateur endeavors (hobbies), if significant (especially if the person writes about that field). Pair with 374 Occupation, if it provides more specificity.
Justify all elements in the 670 field.

**373 (Associated Group)**:
Include as many significant associated groups as known. Use cataloger's judgment to decide what is significant. Use established forms if available. No need to limit to corporate bodies, can include generic forms such as Lutheran Church, and class of persons entries.
Justify all groups named in the 670 field.

**374 (Occupation)**:
Add as many occupations as the cataloger deems significant (Occupations do not have to be paid positions).  Use terms from standard lists, such as LCSH, Thesaurus of Religious Occupational Terms (TROT) or other standard lists. Use plural forms from lists. Add non-standard terms in the singular, if no standard term applies. Pair with 372 Field of Activity if needed to provide more specificity.
Justify all terms in field 670 or use the $v Source subfield.

**375 (Gender)**:
Provide an indication of gender when known, using terms from the standard lists, lcdgt or lcsh.  Capitalize the term. Provide justification in $v or field 670.  Justify by use of gender pronouns, or indicating membership in all male organization, such as the Jesuits, or by indication that a photo was available on the item, etc.  Do not guess, omit if unsure or ambiguous information is found.

**377 (Associated Language)**:
Provide the language or languages in which a person predominately writes, if known.

**378 (Fuller Form of Name)**:
Provide whenever the information is added to the authorized access point. Also provide this information if readily available, even when not adding the information to the authorized access point.
Be sure to justify the information in the 670 field.

**400 (See References)**:

Provide at least all references from alternate entry points and from alternate names. Always add a reference from a former established form of the heading, adding $w nne or $w nnea. Add any other reference deemed useful to catalog users.
Justify references in field 670

**5XX (See also Reference)**
Follow LC guidelines for creating links between pseudonyms found at http://www.loc.gov/catdir/cpso/pseud.pdf. Use fields 663 as detailed there. Use an appropriate $i and $w "r" when recording pseudonymous relationships between two persons. Also use $i and $w "r" when providing a reference to another person, family or corporate body. Consider adding a 510 reference for an employee's employer (reciprocal 500 on corporate record not required), or a 510 for a corporate body a person founded. Use judgment about whether a reciprocal 5XX is required. Always add or update all reciprocal references. Only use relationships noted in Appendix K. Propose any new relationships needed.
Justify all references in field 670.

**663 (Note used for multiple pseudonyms)**
See http://www.loc.gov/catdir/cpso/pseud.pdf for instructions about when to use this field.

**670 (Source Data Found)**
Use to record information required to justify elements detailed in other fields.

**672 (Title related to the entity)**
Use to record a title of a work not expected to be written by the person being established. For example, a book on fly fishing written by a Reformation Historian. Use sparsely until PCC publishes guidelines for use. Also, use this field for a work which required research to connect to the author, especially if an email or phone call was necessary to confirm. Not to be used to build a bibliography of an author's works. Use 2nd indicator 0-9 for non-filing characters. Add $b subtitle and $f date.

**673 (Title not related to the entity)**
Use to record a title of a work not related to the person being established. Use sparsely until PCC guidelines are announced. Use for titles for which research had to be done to determine that the title was not written by the person being established. Use 0-9 for non-filing characters. Add $b subtitle and $f date.

**675 (Source Data Not Found)**
Use to record information about reference sources consulted which did not yield information, if considered important to note.

**678 (Biographical or Historical Note)**:
Provide a user-friendly biographical note if available or considered useful to patrons. This note can be especially useful when there are several persons with the same name, identified by middle names or dates, which a patron might not know. Providing a user friendly note detailing the person's occupation or field of activity, or affiliated groups might help with

immediate identification. Use 1st indicator 0 for a note on a personal name record.  Justify data in the 670 field or add source in $v.  PCC encourages the use of this field.


# Corporate/Conference Names

### 046 (Coded Dates):
Always add dates representing creation and death or name change.  Dates are very helpful when an earlier or later name reference is present. Once it is approved, consider adding activity dates when beginning and ending dates are unavailable, especially for name changes. Use edtf format except for centuries.
**Conferences:**, add dates of the conference.  Include months and days if available.  If only year available, code in both **$s** and **$t**. use edtf format.
Justify all dates in field 670.

### 368 (Other Attributes of Corporate Body):
**$a**  Always add Type of corporate body when possible.  Use an appropriate term in LCSH.  Add an uncontrolled term if no controlled term is available.
**$c** Add appropriate other attributes.  For a conference, add the number of the conference if there is one.  Prefer to give denominational affiliation in 373, even in general form, such as Baptists.
Justify all terms in field 670.

### 370 (Associated Place):
**$c** Add country if appropriate
**$e** Always add headquarters, if known.
**$f** Add significant additional places.
**Conferences**: add location of the conference in **$e** and additional places in **$f**.  Add country of conference in **$c**.
Justify all places in 670 field.

### 371 (Address):
Add address of a corporate body if readily available.  Justify in field 670.

### 372 (Field of activity):
Include areas of activity in which the corporate body or conference engages.  Use established terms, if possible.
Be sure to justify terms in the 670 field.

### 373 (Associated Group):
Include parent body if corporate body is subordinate, or related.  For a conference, include sponsoring bodies. Thus, local churches belonging to a specific denomination could have the denominational affiliation noted.  Okay to use generic

denominational form, such as Lutheran Church, if specific branch is not known.  Prefer to give here rather than 368 $c.
Justify terms in the 670 field.

### 377 (Associated Language):
Note the major languages in which the corporate body publishes or communicates, if known.
Justify the languages in the 670 field.

### 410/411 (Variant Access Points):
Establish any Parent body used as part of reference to a subordinate body.  Make references relating to the subordinate body only.  Make references for the parent body only on the parent body record.  Always make a reference from a former established form and add $w nne.  When referencing a variant form which includes a variant form of the parent body (use sparingly), do so using commas rather than subfield codes (See examples in the DCMZ1, entry for 4XX, See From Tracings).  Use cataloger's judgment to decide what variants to reference.
Justify in 670 field.

### 510/511 (See Also From Access Points)
Use $i and $w r for relationships between related corporate bodies.  Use RDA Appendix K for relationship terms.  It is not necessary to make references between earlier and later versions of the same conference when creating a record for an individual instance of a conference.  Consider a parent body hierarchical reference or a related body reference when creating a record for a subordinate body entered directly.  Consider adding a 500 for a person who founded the corporate body.  Always add or update all reciprocal references.  It is not necessary to upgrade another corporate nar when adding a 510 reference.  Only use relationships noted in Appendix K.  Propose any new relationships needed.
Justify all references in the 670 field.

### 670 (Source Data Found):
Justify all elements of data placed in other fields in the record.

### 672 (Title Related to Entity):
Use sparingly until PCC issues guidelines.

### 673 (Title Not Related to Entity):
Use sparingly until PCC issues guidelines.

### 675 (Source Data Not Found):
Use to record reference works in which one would expect to find information, but none was found.  Use judgment when deciding to include sources.

### 678 (Biographical or Historical Note):
Code with indicator 1 for corporate bodies and conferences.
Supply a note on the history of a corporate body, in concise but complete sentences, suitable for display to the public, whenever

information of value to patrons is available. PCC encourages the use of this field.
Justify in 670 or by use of $v.

# Geographic Names:

**034 (Coded Cartographic Mathematical Data)**
Provide if appropriate (See DCM Z1 for specifications)
**046 (Special Coded Dates):**
Record dates if appropriate, as in the case of a name change. Use edtf format except for centuries.
Justify all dates in field 670.
**368 (Other Attributes):**
**$b:** Always include a type of jurisdiction, even if it is part of the authorized access point. Use established terms, if possible.
Justify type of jurisdiction in field 670.
**370 (Associated Place):**
**$c:** Always add the country.
**$e:** If establishing a city section, add the city name.
Justify all places in field 670.
**4XX (See From Tracings):**
Add appropriate variants.
Justify all variants in field 670.
**5XX (See Also From Tracings):**
Add appropriate related entries.  Always add or update all reciprocal references.
Justify in field 670.
**670 (Source Data Found):**
Include coordinate data, as well as justifying all info entered in other fields.  Always search the appropriate national geographic database (list found in LC/PCC policy statements).
Justify in field 670.
**781 (Subdivision Heading Linking Entry -- Geographic Subdivision)**
Add for every subordinate place which may appropriately be used as a subject added entry.  Do not use on a record for a city section or other place which cannot be used as a indirect subdivision in a subject entry.  Include indicator 0.

# Preferred Titles:

Create differentiated expression records in all cases.

**046 (Special Coded Dates):**
Include dates for a work or an expression if available and record is to be limited to one edition.  If creating an undifferentiated record

for an expression, omit the creation date.  Always provide if used in the 1XX. Use edtf format.

Justify all dates in field 670.

**336 (Content Type):**

Do not supply until PCC issues recommendations.

**370 (Associated Place):**

Indicate place of origin of the work in $g, if known.

Justify in field 670.

**377 (Associated language):**

Always indicate the language for the expression, if determinable. **Note:** Do not add language to work records.

Justify in field 670.

**380 (Form of Work):**

Always indicate the form of the work, if appropriate.  Use standard terms from LCSH, genre lists, etc.  If using an uncontrolled term, give it in the singular.  **Note:** Do not add Form of work to expression records.

Justify in field 670.

**381 (Other Distinguishing Characteristics):**

For Biblical versions, always supply version, translator, publisher, etc.  Supply distinguishing characteristics of expressions, such as translator, publisher, etc.

Justify in field 670.

**385 (Audience Characteristics)**

Wait for PCC guidelines and code list before using this field.

**386 (Creator/Contributor Characteristics):**

Wait for PCC guidelines and code list before using this field.

**4XX (See From References):**

Use cataloger's judgment in supplying references.

Justify all references in 670.

**5XX (See Also From References):**

Use cataloger's judgment in supplying references.  Always add or update all reciprocal references. Use **$i, $w r** when referencing author, translator or editor.

Justify all references in 670.

**670 (Source Data Found):**

Justify all elements in all fields.

## Family Names

**Fixed Fields:**

Set Subj: "n" and Subj use: "b".

**046 (Special coded dates):**

Provide beginning and ending dates or active dates whenever possible.  Always provide if used in the 1XX.  Use edtf format except for centuries.

Justify in 670.

**370 (Associated Place):**

Add places associated with the family if readily available or needed to differentiate from another family.

Justify in the 670.

**376 (Family Information)**

Always add **$a** for type of family. Add **$b** if there is a prominent member of the family. Add **$c** if the family has a hereditary title.

Justify prominent members and hereditary titles in 670.

**377 (Associated Language);**

Add language codes as appropriate.

Justify in 670.

**4XX (See From References):**

Add variant names, using cataloger's judgment as to significance.

Justify in 670.

**5XX (See Also From References):**

Add relationship references for Family member, Progenitor, Founded corporate body, sponsored corporate body, etc. names as appropriate. Always add or update all reciprocal references, as appropriate.

Justify all references in 670.

**667 (Non-public General Note):**

Always add note: SUBJECT USAGE: This heading is not valid for use as a subject; use a family name heading from LCSH.

**670 (Source Data Found):**

Justify all information in other fields.

**675 (Source Data Not Found):**

Use judgment in deciding what sources consulted unsuccessfully to list here.

**678 (Biographical or Historical Note):**

Use indicator 0. Consider providing the public with information about who this family was, or it's significance. PCC encourages the use of this field.

Justify by use of 670 or $v.