



Borrowers Card Record Retention Policy

Patron Verification

To keep patron contact information up-to-date, public library borrower records will be verified every three years. Cardholders will be notified of upcoming need for verification thirty days in advance via email and other electronic means, with a follow up fourteen days prior to suspension. Libraries may also generate system reports in advance for other contact efforts, and to renew cards for local officials, faculty, etc..

Libraries must verify the accuracy and completeness of contact information when renewing the account for an additional three years. Information to be verified includes mailing address, telephone number and email address. Libraries may verify information in person or via telephone or email.

Patrons who live in Massachusetts or New Hampshire with a valid billing address on their account will also have the option to renew their accounts through an online form. For an online renewal, patrons will be asked to review and verify their current contact information. If no changes are made to the address, their accounts will be renewed for three years. If changes are made to the address, the online system will verify that their last name is associated with the new address before renewing their account for three years. If this verification fails, the account will be renewed for 30 days to allow time to contact their library to complete the renewal.

Use of the borrowers' card for borrowing materials and for use of electronic resources will be suspended at the anniversary date until the cardholder contacts the library to verify their contact information.

Patron Purge

Cardholders without checkouts who are expired for three years will be purged on a monthly schedule. Cardholders with bills for items will not be purged; borrowers owing only fines/manual charges will be purged.

Libraries can review a list of users due to be purged on a regular basis to renew cards for local officials, faculty, etc.

Academic Library Option

For cardholders owing only fines and/or manual charges, academic libraries may set a threshold amount for total charges over which their Student/Faculty/Staff/Alumni etc. borrowers will not be purged.

Definitions

Bills - A charge for an item that was never returned. (Evergreen- Lost and Long Overdue)

Fines - Charge for an item returned past the due date (Evergreen - Overdue Materials)

Manual Charges - An amount of money a staff member places on a user's record. (Evergreen - Grocery Bills)