

Action Item 3: Reset Password By Phone

Current Policy:

Users may reset their PIN in person at any PINES participating library with proper identification. PINs may not be obtained over the telephone [2001.11]. Patrons may reset their passwords from the My Account page if they have a valid email address on file [2006.05].

Proposal :

Proposal submitted by Kathryn Ames, Director of the Athens-Regional Library:

I would like to propose we amend PINES policy to allow patrons to reset their PIN over the telephone. This would allow for greater customer service. We have many patrons that are unable to come to the library in person due to physical or financial limitations. Requiring a patron to drive to the library to reset a PIN so that they may go back home and place a book on hold that we do not currently have is just not sensible. Likewise, patrons that use services through GADD and Zinio exclusively do not want to drive to the library to receive a 4 digit code. Secondly, we have patrons that may use their account to place holds from home that do not use email. So the option to reset their PIN through email does not serve them. The current policy hinders our ability to serve our patrons well. The patron's identity should be verified before the PIN is reset. The patron should confirm name, date of birth, address, and phone number.

Survey Results:

The following summary is based on survey results from 44 PINES Subcommittees and Directors representing 30 library systems. Two questions were asked.

Question 1: Should PINES Policy be changed to allow library staff to reset patron passwords if they telephone the library?

Responses from Subcommittee Members:

Should PINES policy be changed to allow library staff to reset patron passwords if they telephone the library?	Responses	Percentage
Yes	18	78%
No	4	17%
Undecided	1	4%

Responses from Directors who are not Subcommittee Members:

Should PINES policy be changed to allow library staff to reset patron passwords if they telephone the library?	Responses	Percentage
Yes	17	81%
No	4	19%
Undecided	0	0%

Comments From People In Favor of the Change:

- I completely agree. Often our patrons need to have their PIN reset quickly. A good example would be someone who needs to download materials from GADD for their upcoming trip. This would be a tremendous service to our patrons.
- If the patron gives the required information, then yes, they should be able to have a staff member change their password over the telephone.
- It should be okay to reset passwords from a phone request if the patrons can provide their library card number and another identifier (birthday, address, etc.). I know it would make our patrons happier and relieve some frustration of not being able to log on from home.
- It's good customer service, especially when we're touting our online services.
- Makes sense. All we need to do is verify their PINES account by asking for a piece of information from their account. We already do that for phone renewals according to PINES policy.
- provided that they can provide enough information to verify identity.
- Provided that we have procedures in place so that library staff does ask questions to confirm the identity of the patron.
- Staff should require library card number and perhaps another point of ID that would match with PINES record (dob, phone #)
- The change for us to reset PIN numbers by phone has been needed for a long time. As long as we have patrons confirm their information there should be no reason that we cannot accommodate their request. I believe this will greatly improve service to our patrons.
- They must have their library card.
- Will the PIN be reset to the last 4 digits of the patron's phone number?
- With the conditions that the account be in good standing -- not expired, not blocked or barred -- and that the patron be able to confirm the information as stated above.
- YES. DEFINITELY.

Comments From People Against the Change:

- I feel by allowing to reset passwords over the phone creates a liability for the library. It also opens the flood gate for patrons wanting to update their accounts over the phone. I rather see a "forgot password" button on the PINES account page, where passwords can only be reset using an email address.
- I polled my branch managers. Sandi Vaughn suggested that IF this were allowed, that there be some type of security question required to help verify identity. Other than that I have three solid no votes. Without some way of verifying identity, we are opening the door to serious security issues - this is the same reason we do not give GALILEO passwords, renew cards, and other such items by phone.

- I value patron privacy and account security too much to support this.
- Impossible to verify identity over phone. Patron privacy is of utmost importance. Think of an ex-husband trying to find out what his ex is checking out such as books about spousal support, etc.

Question 2: If the policy change is approved, is the patron's name, date of birth, address, and phone number sufficient to confirm identity?

Responses from Subcommittee Members:

If the policy change is approved, is the patron's name, date of birth, address, and phone number sufficient to confirm identity?	Responses	Percentage
Yes	15	65%
No	6	26%
Undecided	2	9%

Responses from Directors who are not Subcommittee Members:

If the policy change is approved, is the patron's name, date of birth, address, and phone number sufficient to confirm identity?	Responses	Percentage
Yes	13	62%
No	7	33%
Undecided	1	5%

Comments From People Who Answered Yes:

- If the phone number and/or address no longer match what is on the account (have changed but the patron has not updated) then the patron should be REQUIRED to come into the library to update their information and have the PIN reset at that time. In the same regard, if the patron has incomplete account information then s/he should be required to come into the library to update the account and reset the PIN.
- Perhaps 3 out of 4? Phone numbers change often as patrons drop their land lines, add mobile, etc. And of course there are still some records missing the DOB.

Comments From People Who Answered No:

- Everyone I supervise has access to this information for me. We celebrate birthdays and they know my age; my address is easy enough for anyone to find. Our IT guy's voice could even pass for mine.
- I don't think that the aforementioned identifiers are stringent enough, two of the three pieces of "required" information can be obtained by doing a simple White Pages search.
- I would want the patron to have given me his PINES card number first. Otherwise fine.
- Just name and DOB.
- Library card number should be provided. Otherwise, agree with policy change.

- Must have library card. But don't tell them specifically what the password is--tell them that you will reset it to something only they would have access to. "We will reset your password to your birth year."
- Patron should be able to provide library card number as well.
- SOme sort of an additional identifier -- secret question -- something!
- Some sort of security question or at the very least confirmation of primary ID - DL number, etc.- should be required. Again if it is allowed, then why not do phone renewals of account, GALILEO passwords, etc.? In any event, it will be time consuming and fraught with possibilities for inaccuracies and misuse. If we are going to allow the password to be reset, then why not allow the patron to do it from inside their PINES account online instead of the burden being on library staff?
- The patron's PINES account number must also be supplied by the patron!
- There needs to be one other piece of information that a person should have to verify, such as a previous address or an answer to a questions that only they would know the answer to. If someone steals or finds your id they could give all of this info except possibly the telephone number. We need to ask something that's not on the ID (some security question).
- They must also provide their library card number in addition to these other identifiers.

Comments from People Who Are Undecided:

- If you were a friend or family member, it would be easy enough to know that info and get access to an account. I would free better if we added a security question.
- Last 4 digits of their phone number for a PIN makes it easy.