

PLAY Card Policies and Procedures

Automatically creating student library accounts with data provided by the school district decreases barriers to access for students and reduces staff workload. PINES has developed a method for importing student data from school districts in order to automatically create accounts without manual intervention by library staff.

The name for this program is PLAY (PINES Library Access for Youth). This program is implemented through an agreement between PINES library systems and their regional school systems. Students are given a library account unless their parent opts out with the school district.

Background

The "PLAY Card" program began as a pilot program with Chatham County schools and Live Oak Public Libraries in February 2020. The pilot was extended to several other library systems / school districts between the Fall of 2020 and the Spring of 2021. The PINES Executive Committee voted to make this a permanent program in May of 2021. The program opened up to private schools May 2023, and was approved by the Executive Committee in September 2023 to bring on virtual schools, such as the Georgia Cyber Academy.

Permissions and Policies

The PLAY program requires an opt-out process. Students receive a library card unless their parent opts out with the school during the initial implementation phase, or anytime after their account is created.

These students may visit any PINES library and check out any material type, just like any other cardholder. They may also use all electronic resources available through their home library.

PLAY cards are limited to five checkouts at a time and two holds at a time. Users are not charged overdue fines, but can be billed for lost, long overdue, and damaged materials as normal.

Parents/guardians are responsible for these fines. The student's home library will be responsible for lost or damaged materials and long-overdue fines not recovered by other libraries for their materials. The account expires after one year.

The level of internet access ("Filtered" or "No Access") is at the discretion of the library and school system and should be decided during initial discussions. PINES will designate "Filtered" or "No Access" on student accounts at the school district level. If library reservation software does not check for these settings, further procedures will need to be put in place by the library if students are not allowed access.

[Pilot approved 2018.12. Made permanent 2021.05]

General Notes

Account Prefixes: Each school district is assigned a unique prefix.

Duplicate Accounts: The PINES import process will check for an existing account with the same account number, but will not check for other possible accounts with the same name. It is acceptable for a student to have their PLAY card account as well as a regular PINES account. PLAY card accounts should not be merged with regular PINES accounts.

Graduating Students: When a student graduates, their account will expire at the beginning of the next school year (on October 15), and should not be renewed. They may apply for a regular PINES account at that time. If they wish to keep their circulation history, lists, etc., when they do so, they can be given a physical PINES card and their account can be updated with new information (new barcode, identification, Patron permission group, etc.).

Moving Between School Districts: If a student moves to a new school district that participates in this program, a new account will be generated for them. Their old account will expire at the beginning of the next school year (on October 15), so they may have overlapping accounts for several months. If the student's new school district does not participate in this program, their old account will remain active until the beginning of the next school year. They may apply for a regular PINES card through the usual process.

Reports: PINES will develop shared report templates that can be used by libraries to retrieve data about student account usage. Several reports are available in the following shared report folders:

- *Shared Folders > Templates > smorrison > Help Desk > PLAY Card*
- *Shared Folders > Templates > terran > PLAY Card Reports*

Reporting for digital usage can be performed by the library per resource. Some platforms, such as Libby, have the capability to report based on the user ID (e.g., barcode), so libraries can filter by prefix. Others may not have the ability to be broken down beyond the juvenile categorization. A [shared spreadsheet](#) has been created for libraries to record their monthly statistics if they choose. The last 'Notes' tab in the spreadsheet has information regarding reporting abilities for each resource.

Information for Circulation Staff

Student Account Information

Policies will be developed by the PINES Student Card Working Group and be sent to the PINES Executive Committee for approval.

Barcode/Account Number: School-district prefix (determined by the school district and approved by PINES) followed by a student number unique to the school district (usually the lunch card number). For example: SAV123456. Note that in all instances of inputting the barcode/account number to gain access, the prefix must be typed in all caps.

- The student's ID number without the prefix will be stored separately in the Primary Identification field.
- The student will need to type in the account number (including the prefix) when logging into the

OPAC.

- For self-check machines or computer reservations, the student can type in the prefix and then scan the barcode to enter the rest of the number.
- To retrieve a student account, staff may type in the prefix and then scan the barcode. If staff do not know what the prefix is, they may scan the barcode in the Identification field of the Patron Search in order to retrieve all students that have that ID. (There may be more than one, because IDs are only unique within a district, not between districts.) Staff should then verify the student's school to be sure they have the correct account.

Password: A default password will be assigned based on the DOB (MMYYYY). Students may change their password via the OPAC. It will not get overwritten during student data updates. If the school system wants to provide their own passwords, this can be provided in the csv file.

Username: The default username will be the account number, but students may change that via the OPAC. This will not get overwritten during student data updates.

Card Expiry: The annual expiration date will overlap the beginning of the next school year so that continuing students will not have a period of time without access.

- If a card is created or updated prior to June 30, the expiration date will be set to October 15 of the same year.
- If a card is created or updated after June 30, the expiration date will be set to October 15 of the following year.

School and Grade: The student's grade and school information will be automatically updated shortly before they begin the next school year. So, in the summer months, the information on the account will display the previous year's information. The grade is stored in the Name Keywords field, which can be used as a patron search filter in the staff client, and also used in report template filters. Possible grades are GradePK, GradeK, and Grade01 through Grade12.

Account Updates: A parent/guardian wishing to make any changes to an account such as school, grade, address, etc., should be referred to their school so that the school's database can be updated. PINES will then automatically update that information based on the school's data. (If those fields are updated through the OPAC or the staff client, the data will get overwritten with the school's next data update.) The only fields that should be changed directly in PINES are fields that a patron may change themselves or that are unique to PINES: Username, Password, Preferred Name, Email Address, Hold Notification, and Account Preferences. The grade will be stored in the Name Keywords field, and the school will be stored in the Secondary Identification field.

Lost Cards: If a student loses their school ID card, the school district issues them a new card with the same number, so nothing necessarily has to be changed in PINES. However, if there is concern that the card was stolen and someone else might be using it, staff can (at the request of the student/parent) put an alert on the account that requires staff to verify that the person presenting the card is the correct student. For instance, staff could ask the student to verify date of birth or address, which a card thief would be unlikely to know. If the student is using the mobile app or online services, the PIN/password is required, and third-party self-check machines should be set up to require the PIN/password as well.

The parent also has the option to opt out of the PLAY Card program and may register the child for a standard PINES card instead.

Circulation Policies

Duplicate Accounts: Students may have a PLAY card as well as a full PINES card. If a student moves between two participating school districts, they may have two active PLAY card accounts for a period of time. These should not be merged. To avoid confusion, an alert can be added to the old account noting which account to use.

Number of Concurrent Checkouts: 5

Number of Concurrent Holds: 2

Circulation Restrictions: None

Overdue Fines: None

Long Overdue / Lost / Damaged Fines: Charged as normal. Billed items that belong to other libraries should contact the student's home library for reimbursal.

Max Fine Block: None

If an account has checked out items and/or outstanding bills upon opt-out or expiration, the account will not be purged.

Setup Requirements

Library System Setup Responsibilities

Communications: The library system will provide informational materials to the school district to share with the students and parents regarding the library's materials, services, and policies. A sample folder of communications, including a one-sheet info page and a press release template, is available in a Google drive folder: [PLAY Card Sample MOU and Communications](#).

This information should also include the login name (prefix plus student ID number) and password (MMYYYY), and instructions on adding a custom username, changing their password, and setting their account and hold notification preferences. If the school system is providing their own passwords, this will need to be included in the communications, in place of the DOB-based password.



As of November 2023, the option for school districts to provide their own passwords is not yet operable.

Library staff should be trained on the different policies that apply to student accounts, and should be prepared to handle questions from students and parents.

Single Point of Contact: A single point of contact at the library must be designated for PINES to send messages and notifications to. That point of contact will be responsible for handling problems internally or following up with the school district's IT department. The point of contact will also be responsible for reporting changes to school information or system problems to the PINES Help Desk.

MOU: The library system and the school district must sign a Memorandum of Understanding. A copy should be provided to PINES.

Home Library Mapping: The library will review the list of schools in the list provided by the school district (see School District Responsibilities below) and match each school to the most appropriate home library. The spreadsheet will be updated with the home library's short policy name (e.g., LOPL-OM), and then given to PINES to import into the PINES database.

Third-Party Vendors: The library must determine if any of their e-resource or other third-party vendors rely on barcode prefixes (e.g., 21012) for access to their services. If they do, the library should communicate to their vendor that they should also allow access for accounts with the school district prefix (e.g., SAV).

School District Setup Responsibilities

List of Schools: The school district should provide basic information about all of the schools that will be a part of the project. The spreadsheet should include:

- School ID
- School Name
- Grade Range
- Address
- City
- State
- Zip
- County

For virtual schools, “dummy” schools will be created based on each county, using the [FIPS number for the county](#) as the school ID.

SFTP: PINES hosts an SFTP to which school districts push student data files. PINES will provide the school district with instructions on accessing the PINES server.

Data Exports: The school district must export the data in the specified CSV format with the specified file name.

- [Click here to access the CSV template.](#)
- [Click here for a basic student file extract guide.](#)

Notes:

- The file must include a header row with labels outlined below, in that specific order.
- If there is a null/blank value, the field should still be included in the export. The headers for

unrequired fields should still be included, but can be left blank.

- File naming convention: District prefix followed by date string (DIS_YYYYMMDDHHMM.csv). File names that do not follow the convention will not be recognized by the script and therefore will not be imported. If the student information system (SIS) does not allow for the exact datestring in the extract, as long as there are more characters (for example, the date goes down to the second), this will not affect the import. However, if there are less than 12 characters in the datestring, the file will not be recognized.
- PINES will check for a new update file nightly. The school district may determine how frequently they wish to create update files. If the school is submitting partial files (new and updated students only) files can be submitted daily. If the school is submitting full files of data each time, the frequency must be once per week or less.
- The first full file for implementation should exclude any students who opted out during the opt-out period.
- After the first implementation, opt-out files should be submitted separately, at a frequency of the school's choosing.
- A complete student file including all students should be provided annually prior to October 15 in order that the accounts of continuing students may have their expiration dates updated.

Fields:

- School_ID (State-assigned numeric code)
- Student_ID (District-assigned unique ID)
- Student_FName
- Student_MName (Optional)
- Student_LName
- Student_DOB (Format: YYYY-MM-DD)
- Student_Phone (Optional; Format: 555-555-5555)
- Student_Email (Optional, but highly recommended to allow automated notices - this could also be the parent/guardian's email address)
- Student_Password (Optional, only if school system prefers to provide their own password, instead of generating a default password based on DOB) ***Please note this function is still pending***
- Address_Street1
- Address_Street2 (Optional)
- Address_City
- Address_County (Optional, but highly recommended for statistical usage reporting purposes)
- Address_State
- Address_Postal
- Parent_Guardian (Optional)
- Grade (Format: GradePK, GradeK, Grade01-Grade12)

Single Point of Contact: A single point of contact at the school district must be designated for PINES to send technical issues to. That point of contact will be responsible for handling problems internally and checking for exceptions files, if applicable. The point of contact will also be responsible for reporting changes to school information or system problems to the PINES Help Desk.

PINES Setup Responsibilities

School District Prefix: PINES will approve the three-letter prefix decided by the library system and school district. This prefix will be combined with the student's unique ID (ie, lunch number) to create a unique PINES account number.

Database: PINES will import the school district information and the school-to-library mapping data into the database.

SFTP: PINES will verify that the school district can access the SFTP and import files correctly.

Data Validation: PINES will verify that the student data files provided by the school district are in the correct format.

Ongoing Responsibilities

Library System Ongoing Responsibilities

School Changes: If there are any school changes (new schools added, schools merged, schools closed, schools moved, etc.), the school district will inform the library system's point of contact. The library will need to collect the relevant information from the school district about the new school and submit a Help Desk ticket under the category "PINES / PLAY Card - New School." The information that PINES needs in order to add a new school is:

- Library System Name
- School District Name
- School District's State-Assigned ID Number
- School Name
- School's State-Assigned ID Number
- School Address
- School Phone Number
- School Email Address
- Home Library that should be assigned to students at this school

Opt-outs: If a parent wishes to opt out, they will need to fill out the opt-out form at their school's office. The school district will keep track of opt-outs in their database and create a separate opt-out file that PINES will automatically process to remove the child's account.

If the parent is concerned about the account being used before they are able to get to the school to fill out the form, the library should put a block on the account:

1. Open the student account to the Notes tab.
2. Click the Create Note button.
3. Choose the Block option.

4. In the Note field, type "Parent opted out on MM/DD/YYYY at the X Branch" (where X is the short policy name of the library).
5. In the Initials field, enter the staff person's first initial and last name.

Notes on Changes: If a student wishes to change their address or other general information, they should do so by contacting the school district. Those changes will then be provided to PINES via the update file. Library staff should not make the changes directly because the changes will be overwritten by the school district. As of May 2, 2022, only LocalAdmins and Library Managers have the ability to edit PLAY card accounts.

The fields that will *not* be overwritten by school district information are:

- Username
- Password
- Email Address
- Name Keywords
- Preferred Name
- Alert Message
- User Settings (hold notification preferences)

If a library receives a bounceback email from a PLAY patron's account, staff with the permission to edit PLAY accounts can invalidate the email. After the first import from the school, the student's email address will not be updated from the school data files. This allows students to manage their email address and notification preferences in their account.

School District Ongoing Responsibilities

Periodic Exports: The school district will create update files that include new students and updated student data (address changes, etc.). PINES will check for update files nightly, but the school district may opt to export less frequently. If a school district does not have the capability to send update files, full files can be accepted. Full files should only be sent once per week or less.

Annual Exports: The school district will do a complete file export annually prior to October 15 so that all continuing students will have their accounts updated with new expiration dates.

Opt-Outs: The school district will provide parents with an opt-out form and update the student database with that information. Before the first import, the school district will remove any data for students who have opted out, with the goal of not receiving their data. For any students who opt out after their account is created, the school district will produce a separate opt-out CSV file so that PINES can delete the student's data. The school district will not include that student in any future CSV update files. The format of the opt-out file should be the same as the import file, but named in this format: District prefix followed by "OptOut" followed by date string (DISOptOut_YYYYMMDDHHMM.csv -> SAVOptOut_202003270245.csv). Please note the naming convention is case sensitive.

School Changes: If there are any school changes (new schools added, schools merged, schools closed, schools moved, etc.), the school district will inform the library system's point of contact (who will inform PINES via the Help Desk) so that the mappings can be updated.

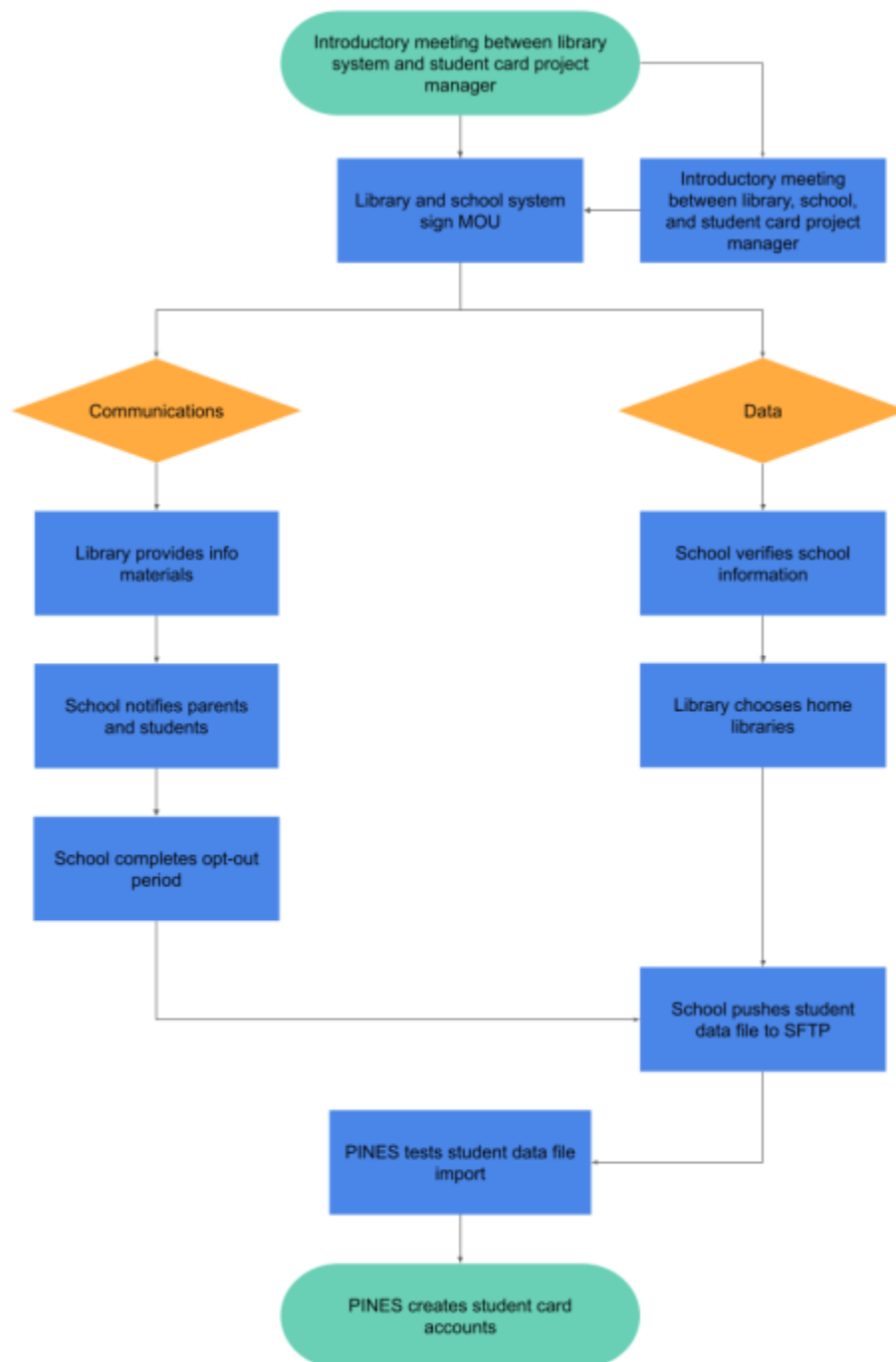
PINES Ongoing Responsibilities

Student Updates: PINES will check the SFTP nightly and import any new update files found. New students will be added, and existing students will be updated.

Opt-Outs: PINES will check the SFTP nightly and import any new opt-out files. The student information will be deleted from the PINES database. An exception applies if the account has checked out items and/or outstanding bills.

Errors: PINES will collect and report any errors to the library system's point of contact. Exception files will be provided in the SFTP directory for the school district to review.

General Workflow for Initial Implementation



Participating Systems/Counties

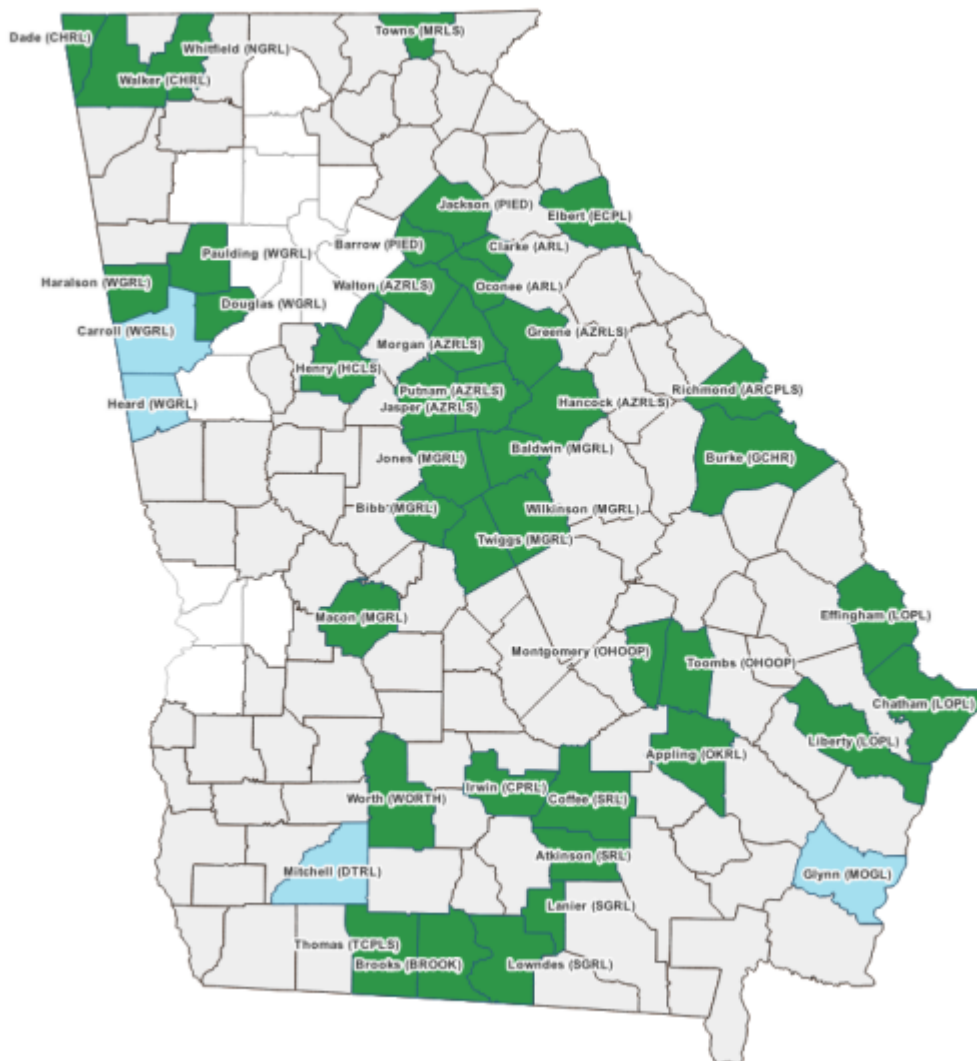
[Click here to see a list of participating school districts and their prefixes.](#) Libraries can refer to the list if a student knows their card number but not their prefix.

Map of Participating Counties

(Last updated January 31, 2024)

Legend:

- Green: Active
- Blue: Pending



PLAY Program Contact Information

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Sign up for the PLAY Card listserv here: <https://groups.google.com/a/georgialibraries.org/g/playcard>

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