Student Card Policies and Procedures

This is working documentation, and will be modified as the pilot program proceeds. If the pilot is successful and approved to expand beyond the pilot library, the circulation policies will be reviewed and updated by the Student Card Working Group and the PINES Executive Committee.

Overview

Automatically creating student library accounts with data provided by the school district decreases barriers to access for students and reduces staff workload.

LOPL Pilot Program

The Student Card permission group is currently for use only by Live Oak Public Library System (LOPL) students during the pilot period beginning February 2020. These students may use any PINES library, just like any other cardholder. They may also use all electronic resources available to LOPL patrons, including RBdigital and GALILEO.

LOPL has proposed calling the program PASS (PINES Access for Student Success).

PINES has worked with LOPL and Chatham County School District to develop a method of importing student data to create accounts in an automated fashion. Student cards are limited to five checkouts at a time and to 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. LOPL 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. [Pilot approved 2018.12, became available 2019.02, modified 2019.12.]

If the program is successful and expands to the rest of the state, the pilot policies will be reviewed by the Student Card Working Group and a proposal brought to the PINES Executive Committee.

General Notes

Account Prefixes: Each school district will have a unique prefix. A list of all of the prefixes for participating school districts will be posted on the PINES documentation web site for libraries to refer to if the student knows their card number but not their 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 student card account as well as a regular PINES account.

Graduating Students: When a student graduates, their account will expire at the beginning of the next school year (on September 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, 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 processes.

Reports: PINES will develop shared report templates that can be used by libraries to retrieve data about student account usage.

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 PINES) followed by a student number unique to the school district (usually the lunch card number). For example: SAV123456.

- 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 school to be sure they have the correct account.

Password: A default password will be assigned based on the DOB (MMYYYY). Students may change that via the OPAC. It will not get overwritten during student data updates.

User Name: The default user name 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 September 15 of the same year.

- If a card is created or updated after June 30, the expiration date will be set to September 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. The only fields that should be changed directly in PINES are fields that a patron may change themselves or that are unique to PINES: User Name, 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 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 student card program and may register the child for a standard PINES card instead.

Circulation Policies

Duplicate Accounts: Students may have a student card as well as a full PINES card. If a student moves between two participating school districts, they may have two active student card accounts for a short period of time. These should not be merged.

Number of Concurrent Checkouts: TBD (5 during pilot)

Number of Concurrent Holds: TBD (2 during pilot)

Circulation Restrictions: TBD

Overdue Fines: TBD (None during pilot)

Long Overdue / Lost / Damaged Fines: TBD (Charged as normal during pilot. Items belonging to non-LOPL libraries should contact LOPL for reimbursal during the pilot.)

Max Fine Block: TBD (None during pilot)

Set Up Requirements

Library System Setup Responsibilities

Communications: The library system will provide information to the school district to share with the students and parents regarding the library's materials, services, and policies. This information should also include the login name (prefix plus student ID number) and password (MMYYYY), and instructions on adding a custom user name, changing their password, and setting their account and hold notification preferences.

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 error 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 reponsible 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 (eg, 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 (eg, 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 (eg, 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

SFTP: The school district must create a secure FTP directory that PINES scripts may access to retrieve student data files.

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

Notes:

- The file must include a header row with labels outlined below.
- The fields must be in the order specified.
- If there is a null/blank value, the field should still be included in the export.
- File naming convention: District prefix followed by date string (DIS_YYYYMMDDHHMM.csv)
- PINES will check for a new update file nightly. The school district may determine how frequently they wish to create update files.
- Update files should only include new students and students with updated information.
- A complete student file including all students should be provided annually prior to September 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 (Format: 555-555-5555)
- Student_Email (Optional, but highly recommended to allow automated notices - this could also be the parent/guardian's email address)
- Address_Street1
- Address_Street2 (Optional)
- Address_City
- Address_State
- Address_Postal
- Parent_Guardian (Optional)
- Grade (Optional, but highly recommended for statistical usage reporting purposes)

PINES Setup Responsibilities

School District Prefix: PINES will assign a three-letter school district prefix to the 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 system scripts can access the SFTP site to retrieve student data files.

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

Ongoing Responsibilities

Library System Ongoing Responsibilities

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 update their database and will create an 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 Message tab.
2. Click the Apply Penalty/Message 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.

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

- User name
- Password
- Email address
- Name Keywords
- Preferred Name
- Alert Message
- User Settings (hold notification preferences)

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.

Annual Exports: The school district will do a complete file export annually prior to September 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. The school district will produce a separate opt-out CSV file so that PINES can delete the student's data (format TBD). The school district will not include that student in any future CSV update files.

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 location 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 location nightly and import any new opt-out files. The student information will be deleted from the PINES database. (TBD: How will bills and currently checked out items associated with the account be handled?)

Errors: PINES will collect and report any errors to the library system's point of contact.