

Record and Data Retention

Patron Record Retention

Updated on 09/03/2014:

The legal department of the Board of Regents has indicated that public libraries are not mandated to follow the USG data retention schedule for "Courtesy Borrowers Records" (a.k.a library patron applications). Libraries should develop their own policies in accordance with the Secretary of State policy for voter registration (that takes place with library applications and updates). Whether you record that electronically or with paper forms is up to the library system. Please keep yourself informed of the Secretary of State's policy by checking their website at http://sos.ga.gov/index.php/Elections/election_connection. (See link for Public Libraries.)

As references in developing a record retention plan for a library system, you may also wish to consider:

- [Georgia Records Act](#)
- [Local Government Retention Schedules](#)

Circulation and Hold Data Retention

With a few exceptions, circulation and hold data that has been resolved/closed is archived by the system after one year. Archiving this data does not affect statistical reporting, such as total number of circulations per item, circulation staff, circulation workstation, and circulating library.

Circulation data with outstanding fines or fees, including Lost and Long Overdue, is retained. Circulation information is also retained for those patrons that opt to have the system store their circulation history.

However, when looking at the "Show Last Few Circulations" item screen or the "Show Cancelled Holds" patron screen, data older than a year is not displayed.

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