

Online Account Renewal: Policy Proposal

New Feature

PINES now has the opportunity to add online patron account renewal to the OPAC.

In preparation to implement this functionality, the PINES Subcommittees and Directors were asked to provide feedback on the policies and procedures surrounding online account renewals. This proposal is based upon that feedback.

Proposal

1. A link to renew online will be added to a patron's "My Account" if the following conditions are met:

1. The account expiration date is no more than 30 days in the future. This matches when the 30-day account renewal email is sent out and will prevent patrons from renewing their accounts too soon.
2. The account is still active (ie, it has been used within the past 3 years). This will ensure that patrons who have not used the library in more than 3 years will need to visit a library in person in order to renew their accounts.
3. The patron belongs to one of the following permission groups:
 - a. Patron
 - b. Friend
 - c. GLS
 - d. Homebound
 - e. Trustee
 - f. Quipu
4. The account is in good standing:
 - a. Account has no unpaid bills
 - b. Account has no blocks
 - c. Account is not barred
 - d. Account is active (ie, has been used within the past 3 years)
 - e. Account has not been flagged with an invalid address
 - f. Account has not been flagged with an invalid phone number
5. The account has not already been given a 30-day temporary renewal (see 2, below).

If these conditions are not met, a message will display that will refer them to their library to update their account information.

2. Upon clicking the “Renew My Account” link, the patron will be presented with a form that will ask them to verify their current address.

- If the patron indicates no address change, the patron will not be required to come into the library to re-validate their address.
- If the patron submits an address change, their account will be temporarily renewed for 30 days.
 - a. The patron will be informed that they need to come into the library within 30 days with new proof of address in order to complete their full account renewal.
 - b. An alert will be added to the patron’s account to inform staff that the patron’s address needs to be validated before fully renewing their account.
 - c. Only one 30-day temporary renewal will be permitted before they visit a library to validate their address.
- If the patron submits an address change, they will also be asked, “Would you like us to update your Home Library / Hold Pickup Library if your new address is closer to a different PINES library location than your old Home Library?”
 - a. A “No” response will keep their Home Library and Hold Pickup Library the same.
 - b. A “Yes” response will automatically assign them to a new Home Library and Hold Pickup Library based upon their new address. (This will match the behavior of the existing online account registration form.)
 - c. In either case, they will be reminded that they can change their Hold Pickup Library at any time through their My Account settings.
- All addresses (both current addresses and new addresses) will be validated against the USPS database to confirm that they exist and will be standardized to USPS format. If the address is not shown to exist, the patron will be prompted to visit the library in person to update their address and renew their account.
- Homebound and GLS patrons will be exempted from the requirement to visit the library in person with to show proof of address.

3. Voter survey

The patron will also be presented with the standard voter registration survey question and their answer will be recorded to their account. If they indicate that they wish to register to vote, they will be given the link to the Secretary of State’s online voter registration website. (This will match the behavior of the existing online account registration form.)

4. Staff interaction

This online account renewal process will reduce the amount of time that frontline library staff must spend updating patron expiration dates and re-validating addresses. Patrons with accounts in good standing and who have not moved will be able to renew their accounts entirely online without staff intervention.

When a patron receives a temporary 30-day account renewal and comes in with proof of address, the new address will already be entered into the system in a standardized format, so staff will only need to:

1. Verify that their proof of address matches what is now in the account.
2. Click the button to update the account expiration date.
3. Remove the alert from the account.

Survey Details

There were two surveys presented - an initial survey, follow-up survey. The survey questions and summary of responses are available in these two documents:

- [Initial Survey](#)
- [Follow-Up Survey](#)