

Action Items

PINES Executive Committee

February 2010

All Subcommittee comments can be found at <http://forums.georgialibraries.org/>

AI1. Handheld Devices Used by Patron to Check Out Items

Many handheld devices such as the iPhone and Blackberry have the ability to store actual barcodes. This means that it is possible for patrons to use the barcode stored on their handheld device to checkout items. PINES policy states that a library card is required in order to check out materials. Can a library patron use their handheld device containing their library card's barcode to check out materials or do they need to continue to use the actual card?

Subcommittee Recommendation:

2 Yes

16 No

Subcommittee Comments:

“Hmmm -- Are we also going allow photocopies of the barcodes to be used? I can see some parent or spouse whipping out the photocopy of a family member's card(s). What if a library's scanners aren't capable of reading their screen? If we allow the high-tech version of this workaround, don't we have to honor the low-tech version too...?”

“If people can't present their driver's licenses to check out items, I don't believe hand-held devices should be permitted.”

“As we move to self-check, this is almost certainly going to be one of the ways that a patron will check out books. I think we have to accept the idea--we won't be as involved directly in the circulation of materials, although I'm sure we'll have a staff member close by. If our self-check system accepts an electronic bar code, they will use it. I definitely will.”

“I worry that using a handheld device to scan a card it is even easier to "steal" a card number. Scan someone's card while their keys are on a counter -- everyone has beaucoup little cards on their keys for the grocery store, etc. I know that this is probably the way of the future, but until we can come up with reasonable security, I think we need to stay with the policy, Scanned card with photo ID?”

“...Therefore, it is our fiducial responsibility to require that a verifiable form of identification be required for patrons to procure the declared services of the public library -- check out books. And that form has been officially identified as a valid PINES library card because it is a physical object, with a modicum of security that we can control. We lose that control and that security

when we allow memory (in the case of people memorizing their card number), photocopies, and iPhone reproductions of a portion of the official identifier to be used.”

“In my opinion, new technology trends are going to force us (libraries) to reconsider some of our current policies. If nothing else, our patrons will come to expect the same sort of conveniences (such as using their hand held devices with their scanned barcodes) that they already receive in other industries. We plan to move toward having some self-check units in the near future, and it would be beneficial for patrons to be able to use their scanned barcodes. Overall, I voted “yes” and would like to encourage a continued discussion of this topic.”

AI2. Claims Returned Policy

The PINES Executive Committee has asked that the PINES Subcommittee vote on whether a more detailed Claims Returned Policy and Procedure be a local decision or a PINES wide policy. If it is a PINES wide policy, then what should be considered and what should that policy state.

Current PINES policy on claims returned states:

If a user claims to have returned materials that PINES still shows as checked out, the material may be marked with a Claims Returned date. Overdue fines stop accruing as of the date entered in the Claims Returned field. A user may have up to 5 Claims Returned items on his record at any time.

Subcommittee Recommendation:

14 Yes, it should be a PINES wide policy.

3 No, it should be a local policy.

Some Subcommittee Comments:

“Although I'm not a fan of "Claims Returned" and our System generally doesn't use it, I think that the policy as it stands is fine. Maybe it could be elaborated to say something like the following:

Claims Returned is when both a library system and a patron are unable to agree on the location of the disputed item thus creating a 'draw' or 'amnesty' for the item. Claims returned can only be done by the item's owning library. If a user claims to have returned materials that PINES still shows as checked out, the material may be marked with a Claims Returned date. Overdue fines stop accruing as of the date entered in the Claims Returned field. A user may have up to 5 Claims Returned items on his record at any time.”

“If there is a change in the claims returned policy it should definitely be a PINES policy. I agree that the changes might clarify what constitutes a claims returned, and that it should show that it is an agreement between the library staff and the patron. It also should be only the owning library marking the item claims returned.”

AI3. Date of Birth a Required Field in the Patron Record

A proposal to request a change in the Evergreen software that would make Date of Birth a required field, with the added option of “No Birth Date Given” for patrons who prefer not to disclose their age.

The arguments for this change:

- It helps staff to quickly process library card applications and verify no previous library card has been issued.
- PINES needs this information to distinguish between adult and juvenile accounts
- It helps distinguish patrons with the same name – so John J Smith (DOB: 12-12-1978) won't be confused with John J Smith (DOB 5-23-1968) with a fine balance of \$270.20
- It helps staff connect two accounts with different last names – if there are concerns that Sarah Johnson might also be Sarah Johnson Smith.
- Date of birth is a common requirement on most applications (like credit and membership card) and not an unreasonable request.

FYI -- 22% of active patron records have no date of birth on their account.

Subcommittee Recommendation:

20 Yes

0 No

Subcommittee Comments:

“...I'm leery about patrons not willing to provide a birth date as attempts to get back lost materials and fines are sometimes more difficult if there is not additional detail to further prove we are going after the correct individual.”

“We've always thought of this as a required field. Those patrons that are reticent to share their birth date are reminded that patron records are confidential and that we would not ask for it if we did not need it...”

“...If the patron does not want to give the exact birth date, then they need to give the year and the staff can put the date at January 1st of the year.

As so many library systems use PINES to authenticate for Internet access, and as many of the library systems base the degree of Internet access on the age of the patron, I think that we need at least the birth year if not the actual birth date.”