

Library Board Policy Manual
Policy Addition to Policy V: Use of the Library, Section F, Patron Records
Boise Public Library
Ephemeral Patron Records Retention

Adopted January 8, 2003

The Boise Public Library may generate various forms of ephemeral records with patron phone numbers, addresses, and/or email addresses for administrative and/or various business purposes such as telephone or email reference requests and questions, patron hold requests, program requests, PC reservations, etc.

These records may exist in hard copy or electronic form and are destroyed on a regular and routine basis.

*Ephemeral Patron Records Retention Schedule
Addition to Appendix VII, Library Board Policy Manual
January 8, 2003*

Record Name	Description	Retention Period/Method of Destruction
“Will Hold” slips	Used to hold library materials for patrons at service desks for period no greater than 2 days.	Destroyed after request is filled or when 2 day period expires. Destroyed by shredding.
Telephone Reference slips	Used to respond to patron reference questions via telephone.	Destroyed after question is answered or after patron has been called back. No longer than 2 days after initial reference question. Destroyed by shredding.
Ask-a-Librarian Requests	Reference questions via email.	Hard copy shredded after reference question answered. Electronic copy may be retained for up to 1 month for statistical purposes, then electronically shredded.
Missing Item/Search Request	Used to search for items patrons claim to have returned.	Destroyed after search completed and patron has been called back. No longer than one week from initial inquiry. Note may be attached to Patron electronic record. Destroyed by shredding.
Patron Purchase Request	Used by patrons to request specific titles for the library to purchase for the collection.	Destroyed after: <ul style="list-style-type: none"> a. decision is made not to purchase material and patron has been notified. b. Destroyed after electronic order has been placed in IOLS. Patron hold attached to item.

Record Name	Description	Retention Period/Method of Destruction
Bookmobile & Homebound Service Request	Used by staff to deliver material requests to homebound, senior living centers, and bookmobile stops.	Destroyed after request is filled or within three weeks after request, if patron does not claim item(s).
PC Reservation List	Includes patron name, used to reserve a time for PC usage.	Retained for 1 week. Destroyed by shredding.
Patron Hold Slips	Used to identify library materials on reserve for a patron. Includes patron's last name and item title.	Slip is given to patron when patron comes in to check out item on hold. Items not claimed within 7 days are returned to the shelf, patron slips destroyed immediately. Method of destruction: shredding.
Story Program registration list/waiting lists	Used to register children for Youth Services story programs. Waiting lists use the same registration form.	Destroyed at conclusion of program period, usually 3 months.
Class Visit/Tour reservation form	Used to reserve and/or book a time for tour or class program. Includes school name, grade level, phone number, teacher name, date of reservation, and subject requests.	Retained for one calendar year. Destroyed by shredding.
Interlibrary Loan Request Forms	Contains patron name, address, phone number and material request for interlibrary loan service.	Records kept for 2 months or when loan is completed, whichever comes first.
Patron Library Card Application Form	Used to obtain basic patron information (address, phone, etc.) to create patron record in integrated online system.	Shredded daily after information is entered into system.
Meeting Registration Form	Used to reserve public library meeting rooms.	Destroyed after 1 year. Electronic calendar archived in GroupWise.

Record Name	Description	Retention Period/Method of Destruction
ELECTRONIC RECORDS		
Patron Record in Dynix Each of the following listed below may be elements of a patron record at any given time.	Contains address, phone number, etc..	Purged within 2 years of the last active date if no activity recorded.
<ul style="list-style-type: none"> • <i>Outstanding fines and fees, items.</i> 	Lists all outstanding overdue items and unpaid fines and fees	Retained for patron history until patron record is purged.
<ul style="list-style-type: none"> • <i>Borrowed items</i> 	Lists current materials checked out to patron.	Purged 7 days after a patron returns items.
<ul style="list-style-type: none"> • <i>Items placed on hold</i> 	Lists items a patron may currently have on hold.	Purged when a patron picks up the hold and checks the item out.
<ul style="list-style-type: none"> • <i>Holds List (optional)</i> 	Lists all holds patrons may make during a calendar year. Patron option.	Purged at the end of each calendar year for each patron.
<ul style="list-style-type: none"> • <i>Last item checked out</i> 	Lists the last item a patron may have checked out, but has returned.	Purged 7 days after item is returned.
<ul style="list-style-type: none"> • <i>Incident notes</i> 	Lists incidences such as lost items, claims returned, etc.	Perpetual
<i>Pharos Records</i>		
<ul style="list-style-type: none"> • Session Statistics 	Includes number of sessions and length of sessions. Does not indicate sites visited nor patron identification per PC.	Retained for one month, then purged..
<ul style="list-style-type: none"> • Public PC Cache Files 	Record of activity, Internet sites visited on a PC.	Purged after each patron's session.

Revised: 9/18/03