



## **Evergreen Indiana Patron Record Confidentiality Policy**

This policy establishes the guidelines for the protection of personally identifying information contained in library records or accessible within the library or through its computer systems.

1. A "Patron Record" is defined as information created, received, maintained, or stored by a library, in any format, that:
  - a. identifies a person as having requested or obtained specific materials and/or information from a library, including database search records, or
  - b. identifies a library patron by name, address, telephone number, e-mail address, or any other similar manner, or
  - c. otherwise links a library patron with identifiable uses of library materials, facilities, or services.
2. A "Member Library" is an Indiana library that by means of executing the Evergreen Indiana Membership Agreement has joined the Evergreen Indiana Consortium. For the purpose of this Patron Record Confidentiality Policy, "Member Library" shall be interpreted to include the Indiana State Library.
3. Only the authorized staff members, independent contractors, and other authorized agents of Member Libraries shall access Patron Records, and such access shall occur only as needed when acting within the scope of duty in the administration and maintenance of the Evergreen library system and in administering library transactions.
4. Staff of Member Libraries shall not disclose or release Patron Records to any person other than the patron named in the record (i.e. the library card holder), unless the requestor is also the person who signed to accept financial responsibility for the card holder. The requestor must present the library card or current ID to receive this information.
5. Disclosure or release of a Patron's Records to a third party shall only occur upon the Member Library's receipt of a valid subpoena, court order, signed written consent of the patron, or other legal process, unless such disclosure falls under the access permissions noted in provision #3.
6. In the event of the receipt of a valid third party Patron Record request, a Member Library shall only disclose or release the Patron Records of a person whose library membership originated in its particular library. No single Member Library shall disclose or release the Patron Records of any person whose library membership originated with a different Member Library.

7. The Member Library's Director and/or Board, along with legal counsel when necessary, shall be responsible for determining whether or not a third party Patron Record request is valid and should therefore be satisfied.
8. In the event a third party Patron Record request is received by a Member Library that is not the Indiana State Library, a copy of the subpoena, court order, signed written consent of the patron, or other legal process shall be forwarded to the Indiana State Library along with a notation whether or not the request was fulfilled.
9. In the event the Indiana State Library is presented with a valid third party request for Patron Records, the Indiana State Library will contact the Member Library with which the library patron initiated membership, and the Indiana State Library and Member Library shall coordinate the disclosure or release of Patron Records, as appropriate.
10. Any Evergreen patron requesting by telephone a list of items checked out on a specific card must use the barcode number. Library staff shall not give out any *specific* information without the Evergreen barcode number; staff may only give out the number of items due and the due date.
11. For purposes of compiling statistics, borrower information linked with specific item information shall not be displayed or listed.
12. Each Member Library is responsible for ensuring its staff are aware of and comply with these privacy policies.

*Adopted by the Evergreen Indiana Executive Committee on March 10, 2009.*