Northern Waters Library Network

Best Practice for patron notes and messages related to patron conduct

APPROVED – September 22, 2022

Member libraries may elect to use notes or messages in Sierra patron records to include information about bans or denial of services. Libraries <u>are not required</u> to use the ILS to retain this information.

If a member library chooses to include a note/message in a patron record, NWLN suggests these best practices:

- Include a brief, factual statement of the issue; staff initials; library code; and the date the note was placed. Example:
    - *Patron is banned from the Anytown Public Library until December 1, 2022, due to a violation of the Anytown Library Patron Conduct Policy. TS mr 6/1/2022*
- Choose between the **note** field and the **message** field:
    - A note is contained in a patron record but does not pop up when the record is opened. Notes are best for information that can be looked up by a library staff member.
    - A message pops up automatically and is visible to anyone who opens the patron record. Use a message when you want the information to be seen immediately. Messages are best for sharing important information that everyone needs to know and for items that need attention such as contact information updates.
- Remember that notes and messages can be visible to anyone that accesses that patron record.
    - Consider patron privacy and only include the minimum amount of needed information.
    - Include the cause of the note only if it is important information for your library or other libraries to know. Otherwise, use a simple statement about what the patron's restriction is and the date when the restriction expires. Example:
        - Do **NOT** write "Mary is banned from our library because she showed up drunk."
        - **DO** write: "Patron is banned from the Anytown Public Library until <date>." or "Patron is denied ILL services at the Jones Memorial Library until 1/1/2024."
    - Use professional and objective language in all notes and messages. Don't write anything in a patron record that you would not be willing to read out loud to the patron.
    - Do not use notes/messages to record general observations about a patron or to to record incident reports. Use notes/messages only to record important factual information about library service eligibility.
- Member libraries should use their own policies and records retention guidelines to determine when notes/messages are removed from the patron record. Do not remove notes/messages about patron conduct or eligibility placed by other libraries. If you feel that a note/message should be removed from the patron record, contact the library that placed it. Any library that places a note/message in a patron record should remove that note/message when the issue is resolved.
- "Claims returned," "lost & paid," and other system-generated notes should be handled by the library that owned the materials in question.
- Remember that a ban or denial of service at one library in the network does not necessarily mean the patron is subject to the same ban or service restriction at all member libraries. Each member library should follow their own service and patron conduct policies to determine service eligibility.