Purging Patron Records

Sarah Nordholm, Assistant Director at Summit County Library posted the following questions to libnet.

1. When you issue a library card, how long is it good? (one year, two years, forever?)
2. If your cards expire, how often do you purge patron records? If the card is expired, how long do you leave it in your database? And how does that purge affect your numbers for the State Library reports every year?

The following table displays the responses and respondents to this inquiry.

Library	Respondent	Response
Mesa County Public Library District, Grand Junction	Penny Shiel	1. We generally make cards good for two years. 2. We purge patron records every January. We heave ho any record that has expired by at least a year. As for how it affects your State Library Reports…the first time you do it will be traumatic. After that it's standard operating procedure and its' no big deal.
Bud Werner Memorial Library, Steamboat Springs	Alysa Selby	1. 1 year for regular patron, 3 months for a guest patron. Once their term is up and they return to check out materials, the computer is programmed to block their account until it has been updated. At that time, we re-activate the account for another year. 2. We delete all patron records that are expired and have been inactive for more than 2 years. Considering the number of guest cards we issue, such purging does not really affect our numbers with the state. If anything we feel that we are not inflating our numbers.
Woodruff Memorial Library, La Junta	Sandy Messick	1. We set our cards to "expire" every year on the anniversary of issue. That way we go back

		into the patron records and check to see we still have a correct address and phone number. As long as the patron remains active, the card is good forever.
		2. As for purging records, we intend to purge all accounts that have been inactive for 2 years and have no associated fines. In reality, it doesn't happen that often. If we don't purge, soon we have way more patrons than persons in our LSA! That isn't helpful for state reports either. My assumption is that if we purged regularly, we would balance out between accounts deleted and new patrons.
Spanish Peaks Library District, Walsenburg.	Monica Kirby	Should have a policy but we really don't. Recently decided to purge our patrons who had not been in the library in 5 years and did not owe any fines. Many of these patrons have reappeared since we did that, so I'm not sure… We bought new key fob cards last year and are trying to get everyone a new card. I know this will lower our state numbers, but you can always make a note in the annual survey. If you do this on a regular basis, I assume the numbers will even out.
Weld Library District, Greeley	Janine Reid	1. 3 years, then our Horizon system alerts us it is time to update the information.
		2. We purge after 3 years of inactivity. After the purge, the only patrons who remain are those that owe a fine or still have materials checked out.
Louisville Public Library	Debra S. Van Tassel	1. We issue library cards with an expiration date two years from the date of issue. We found that one year was too short a time and required frequent

		staff updating.
		2. We purge patron records once a year (at the end of the year) that have been expired for more than one year and card has not been active during that time. As a result the number of patrons drops significantly for the first month of the next year. Our numbers increase over the year to about what they were before purge. 3. One caution is that if you have an ILS system that tracks electronic use by a patron, you would not want to purge patrons that are using your computers even if they don't check out items.
	Dodie Ownes, library consultant	1. Most libraries base keeping a patron record in the database on USAGE. 2. You may have patrons that never come into the library or get a book, but use your online resources. 3. If the patron record is not updated by your automation system to show USAGE when they sign on to a licensed resource, you may delete patrons that are actually using your resources. 4. That said, if your system is counting all kinds of usage for the patrons, I would suggest deleting any patron that has had no usage of any kind for 3 or more years.
Library Research Service	Nicolle Steffen	For the Colorado Public Library Annual Report we recommend purging patron databases of unused borrower records every three years.