

Library Patron Privacy Inventory

Circulation and Borrower Records

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Patron library card application	Paper Electronic	<ul style="list-style-type: none"> • Name • Mailing address • Telephone no. • Driver's license # or student ID • Date of birth • Personal Identification Number (paper only) • Email address • Language preference • Signature, or name of parent or guardian and signature • Phone number 	Circulation desk	Circulation desk staff	Library card applications are retained for up to one week after which they are shredded.
Business card application	Paper	<ul style="list-style-type: none"> • Business name • Address • Email address (personal) • Phone number • Responsible party plus up to 3 other persons who may use the card 	Borrower Services manager's office	Borrower Services manager	Indefinitely; kept to verify that cardholder made the request.
Patron database	Electronic	<ul style="list-style-type: none"> • Name • Address, Address 2 • Telephone, Telephone 2 • Unique ID Number • Message • Internal Note • Barcode 	Sierra database	IT staff; Library staff logged on to Sierra (all data <u>except</u> PIN, check-out history, and preferred searches)	While active: <ul style="list-style-type: none"> • Link between patron record and item record is severed once the item is returned.

* P = paper E = electronic T = telephone

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		<ul style="list-style-type: none"> • E-mail Address • In Care Of • Company • Registration date • Parent/Guardian • PIN • Expiration Date • Patron code 1, 2, and 3 • Patron Type • Total Checkouts • Total Renewals • Current Checkouts • Birth Date • Home Library • Patron Message • Manual Block • Claims Returned • Money Owed • Books • Videos/DVD • ILL Request • CDs • Audio Books • CIRCACTIVE • Notice Preference • Primary Language 			<ul style="list-style-type: none"> • Overdues and owed fines records kept until paid; then for 3 years in finance. • Unpaid item records deleted after 3 years. <p>Inactive patron records are deleted annually.</p>
Library notices:	Paper Electronic Telephone	<ul style="list-style-type: none"> • Patron name • Patron email address • Patron home address • Patron barcode • Title of item; call number, barcode 	Data is located in Sierra database. Notices are sent to patron. IT Division and mailing service,	Library staff logged on to Sierra IT Division DMC Patron Finance Office	IT staff deletes files in sent and in box folders in 24 hours or upon delivery of the next day's files. IT Systems Manager will

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		<ul style="list-style-type: none"> • Due date; branch; check-out date • Overdue amount, replacement cost, total charges 	<p>(Direct Mail Center, (DMC) receive copies. Finance Office receives billing information.</p> <p>Returned postal notices delivered to Borrower Services.</p>	<p>Returned postal notices accessible to Borrower Services staff a) to indicate in patrons' records and b) who may need to refer to them to verify with patrons.</p>	<p>retain files for diagnostic purposes for six months. DMC discards data after 24-hours.</p> <p>Finance Office keeps billing information for 3 years (as per Public Library Retention & Destruction Policy). Teleforms history is kept for 10 days. Finance Office does not receive billing information nor invoices for lost items.</p> <p>Returned postal notices are shredded.</p>
Holds notice	Paper Electronic	See library notices			
Cancelled reserve	Paper Electronic	See library notices			
Overdue Billing	Paper	See library notices			
Held item	Paper Electronic Telephone	See library notices			
Overdue notice	Paper Electronic	See library notices			
Courtesy Due Notice (email)	Electronic	See library notices			

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Police / Fire Department report	Paper	<ul style="list-style-type: none"> Patron name, birthdate, race, sex, height, weight, hair color, eye color Address Phone number ID type and number Email Copy of actual report List of stolen / damaged items Location of theft / fire event Incident number 	Cash room (locked room within Borrower Services staff area)	Borrower Services manager, Borrower Services supervisors; 1 st Floor Manager; Circulation Services Tech	Report is kept indefinitely; provides backup for staff denial of patrons' claims.
Holds wrapper	Paper	<ul style="list-style-type: none"> Patron barcode Patron last name, first 4 letters of first name Item barcode Expiration date 	Paper wrapped on book spine in holds pickup area; or behind circ desk	Public; library staff	<p>Until item is retrieved and checked-out by patron, or hold expires.</p> <p>Patron may request to have all reserves placed behind the staff desk for pick-up.</p>
Receipt for item checked out	Paper	<ul style="list-style-type: none"> Item title; item barcode Date of transaction and date due Patron's barcode Branch 	Generated at checkout station	Patron	Patron Discretion
Receipt for item renewed	Paper	<ul style="list-style-type: none"> Item title; item barcode Date of transaction and date due Patron's barcode Branch 	Generated at checkout station	Patron	Patron Discretion
Item returned receipt at LibraryMates	Paper	<ul style="list-style-type: none"> Time and date of return Item title, item barcode 	Generated at LibraryMates	Patron	Patron Discretion

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
		<ul style="list-style-type: none"> Total number of items 			
Checked-in Items summary receipt	Paper	<ul style="list-style-type: none"> Time and date of return Item barcode, Call Num, title Patron name Amount Due 	Generated at circulation desk	Patron, library staff	Patron Discretion
Clear Hold Shelf notice	Paper	<ul style="list-style-type: none"> Patron name Item title, call number, barcode Date hold placed; date hold expired Location of item (shelf) 	Printed for library staff	Library staff working on hold shelf	Holds lists are processed and shredded within 24 hours after they are issued.
Cancelled holds	Electronic	<ul style="list-style-type: none"> Patron name Date cancelled Item title, barcode Branch lodging 	Sierra server; not sent to patrons	Library staff logged in to Sierra	Data is stored in database for 30 days from the time the hold is cancelled then automatically purged.
Fines summary	Paper Electronic	<ul style="list-style-type: none"> Invoice Charge type Call number Author Barcode Title Charge location Statistics group Checkout date Due Date Assessed date Date paid Payment status 	Sierra server	Library staff logged in to Sierra Finance Office staff	<p>Documents with patron information, fines notices, lost and paid receipts, are shredded after 12 months.</p> <p>Cash reports, cash receipts, and payment documents are retained for five years after applicable fiscal year; three years onsite and two off site (per Public Library Record Retention & Destruction Policy).</p>

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		<ul style="list-style-type: none"> • Initials • Item charge • Processing fee • Billing fee • Total • Previous paid • Amount paid • Amount due 			
ILL transactions via OCLC	Electronic	<ul style="list-style-type: none"> • Patron barcode • PIN • Item author, title, etc. 	Sierra server;	Library staff logged on to Sierra ;	Data is deleted when the transaction is completed.
ILL patron files	Paper	<ul style="list-style-type: none"> • Name • Address • pCode • Pickup location • Unique transaction number 	ILL office	ILL staff; select Borrower Services & Info Services staff	Shredded after item is returned
Link+	Electronic Paper	<ul style="list-style-type: none"> • Patron barcode • PIN • Item author, title, etc 	Sierra server;	Library staff logged on to Sierra ;	Data is deleted when the transaction is completed; some paper ILL records are kept for statistical purposes.

OPAC and System Services

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
"My Sierra" settings	Electronic	Circulation activities: holds, renewals, preferred searches	Sierra server	Personalized information, such as PIN, preferred	Data is deleted with patron data when inactive patron records are purged annually.

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				searches, limited to Patron	
Offline Backups	Electronic	All data files	Locked staff area	IT staff	Tapes are rotated weekly.

BiblioCommons Service

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
BiblioCommons - Registered User Data	Electronic	Library Barcode PIN Borrower ID Name Birth month & year Email address	BiblioCommons Servers	IT, other library staff who are BiblioCommons Administrative users and BiblioCommons staff	As long as BiblioCommons account is active
BiblioCommons – when signing up for Summer Reading	Electronic	Information above, plus: Educational level	BiblioCommons Servers	IT, other library staff who are BiblioCommons Administrative users and BiblioCommons staff	As long as BiblioCommons account is active
BiblioCommons – Circulation Records of Registered Users	Electronic	Loans Due Dates Outstanding Fines Outstanding Fees Holds	BiblioCommons Server pass-through	Patron	Data passes through BC server as it is looked up, but is not stored on the server.

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
BiblioCommons Shared Content (if voluntarily contributed)	Electronic	Shared content with public settings Shared content with public settings - interactive Shared content with private settings Messages and Chat	BiblioCommons Servers	Public if public settings	Content that is not interactive or with private settings – Until account is deleted Interactive Content – Indefinitely Messages & Chat - Indefinitely

Reference Services

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Reference queries by email	Electronic	<ul style="list-style-type: none"> Email address + (optional) Name Fax # Library card # 	City email system	Reference services staff May be kept in multiple staff email accounts (KS)	Data is purged after 60 days; library public services departments retain information for reference purposes by topic for maximum two years before shredding. City Emails are kept indefinitely or until space becomes constraint at 5Gb. (ml)
Reference queries by text and chat - LibAnswers	Electronic	<ul style="list-style-type: none"> Name City Email (optional) Cell Phone? 	LibAnswers server?	Staff member onsite or at participating library who answers question.	See privacy policy at ???

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Telephone, face-to-face and e-mail reference	Electronic	<ul style="list-style-type: none"> • Query • Contact information 	At reference desk	Librarian(s) who provides service.	Data is discarded when question is answered.
Homework Help	Paper	<ul style="list-style-type: none"> • First name of child • First name of parent 	At Children's/Reference Desk	Librarians and volunteers who provide service	Up to one year, then shredded.

Library Web Site

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Web server logs	Electronic	<ul style="list-style-type: none"> • Filename in each request to server • Originating IP address • Requesting browser type • HTTP status • Date and time 	Web server computer	IT staff	Data is purged automatically as disk space becomes inadequate. Could be retained 6 months or more.
Suggest a title	Electronic	<ul style="list-style-type: none"> • Patron's name • Title suggested 	Via email to a collection development committee of librarians	Members of the committee	City Emails are kept indefinitely or until space becomes constraint at 5Gb. (ml)
Class Visit Online Request	Electronic, then printed in-house	<ul style="list-style-type: none"> • Teacher's name, • Name of School • Grade • Number of students • Telephone number • Email 	Via email to library technician, who then prints a copy for Youth Centers Librarians	Library staff	City Emails are kept indefinitely or until space becomes constraint at 5Gb. (ml). Paper copy is discarded at the end of each month

Reader Services

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Summer Reading	Paper	<ul style="list-style-type: none"> Name School Address? Age Email (optional) Emergency contact (volunteers only) 	Librarian's desk, or at the reading table	Library staff and dedicated volunteers	Data is shredded 60 days following close of Program.
Class Visits	Paper	<ul style="list-style-type: none"> Teacher's name, Name of School Grade Number of students Telephone number Email 	Librarian's desk	Library staff	Data is discarded at end of each month.
Kid Power volunteer		<ul style="list-style-type: none"> Name Address Phone Parent name Age School Emergency contact 	File in librarian's desk or other nonpublic locations	Library staff	Data is shredded at end of 12 months.
Teen services, programming	Paper Electronic	<ul style="list-style-type: none"> Name Email or IM id sometimes: <ul style="list-style-type: none"> Age Grade School 	Librarians' computer or desk	Teen librarian	Paper forms are shredded and online forms/data are deleted after 12 months.

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Project Read/Learning and Instruction Unit	Paper Electronic	<ul style="list-style-type: none"> • Name, address, phone, email (both volunteer tutors and learners) • Demographic information (age and ethnicity) of tutors and learners. • Learner goals and goals updates. • Reading, writing, and comprehension assessments of learners. • Educational history of learners and tutors. • Teaching and volunteer experience of tutors. • Availability (time and location) for meeting (both volunteers and learners) • Employment information (tutors and learners). • Ages of children in the home, for adult learner/parents. • Personal interests/hobbies of tutors and learners 	<p>Staff only area and database requiring password</p> <p>Staff only area and database requiring password</p> <p>Staff only area</p>	<p>Learning and Instruction Unit Staff</p> <p>Learning and Instruction Unit staff</p> <p>Learning and Instruction Unit staff</p>	<p>Paper files shredded after 15 years.</p> <p>1 year (until completion of annual reports)</p>

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
		(for matching purposes) <ul style="list-style-type: none"> • Book distribution (free instructional books and materials for learner book club) • Workshop attendance (by name) for learners and tutors. • Workshop/event RSVPs 			Shredded after workshop/event
Learning Center	Paper	<ul style="list-style-type: none"> • Name • TBD 	LLC Reception Desk	Learning and Instruction Unit Staff	TBD
Veteran's Resource Center	Paper	<ul style="list-style-type: none"> • TBD 	Veteran's Resource Center	Learning and Instruction Unit Staff, VRC volunteers	TBD
ADA computers	Paper Electronic	<ul style="list-style-type: none"> • Name, phone #, date • Nature of disability • "How do you want to use the equipment?" 	Database on Library staff intranet (name only) Binder at Access Services Manager's desk.	Library staff	Data is retained for ongoing communication as long as user is active. Users are contacted annually for updates. Inactive user data is removed and shredded.

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Deaf video phone service	Paper	<ul style="list-style-type: none"> • Name 	Service Desk	Library staff	Data is shredded daily.
Adaptive Technology room use	Paper	<ul style="list-style-type: none"> • Name • Date of entry • Time of entry 	Paging desks	Staff of corresponding unit	Shredded within 24 hours (3 rd fl)
Library for the Blind	Paper Electronic	<ul style="list-style-type: none"> • Name, address, phone number • Preferences and exclusions • Patron date of birth, gender, library status, disability type • language • Service information, service types • Periodical subscriptions • Veteran status • History of materials and equipment borrowed or requested 	National Library Service/Library of Congress database and KLAS database, CMLS (Comprehensive Mailing List System/NLS database for subscriptions, machines and changes to patron information)	Blind Services staff (secured by individual passwords)	Data is retained in National Library Service database throughout life of the individual and beyond CMLS kept for 1 year, then purged if service is cancelled or suspended

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Friends for Life, including Books by Mail service	Paper	<ul style="list-style-type: none"> • Name, address, phone • Email (optional) • CDL # • DoB • Disability verification or Health care provider • How does disability prevent you from using library services? • Designated borrower • Signature 	Librarian's desk in Library for the Blind & Print Disabled; limited data in Sierra Server	Access Services Manager and librarians	Users are contacted annually for updates. Inactive user data is removed and shredded.
Book clubs	Paper Electronic	<ul style="list-style-type: none"> • Name • Phone number • Age • School • Email 	Librarians' desks and/or email accounts	Volunteers and other book club members may have access	Contact information may be retained at patron request for use in further communication about library programs; otherwise, all data is shredded at conclusion of program. .
Suggestions & Comments	Paper Email	<p>May include some or all of the following:</p> <ul style="list-style-type: none"> • Name • Email • Address • Phone number • Library card number • Time/day/location of library visited 	All divisions' administrative offices	Administrative staff	Consistent with period specified in SFPL's Record Retention Policy – 5 years.

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Obituary search requests	Paper Electronic	<ul style="list-style-type: none"> • Name • Email • Address • Phone number • Name of the deceased • Date of death • Place of death 	Paper kept in Mags/News staff area	Mags/News staff has access to paper and electronic data	Paper kept 6 months
SF History/BASC patron sign-in log	Paper	<ul style="list-style-type: none"> • Name • Address 	Manager's office	SF History/BASC staff	3 months
SF History/BASC paging slips	Paper	<ul style="list-style-type: none"> • Name • Address • Item(s) being paged 	Manager's office	SF History/BASC staff	3 months
SF History photo copy order forms	Paper	<ul style="list-style-type: none"> • Name • Address • Phone • Email • Details of copy order 	Manager's office	SF History/BASC staff	3 months
SF History photo desk order forms	Electronic Paper	<ul style="list-style-type: none"> • Name • Address • Date • Phone • Email • Items ordered • Quantity ordered 	Library server Paper forms kept in Photo Room	Photo Desk staff	Paper kept permanently

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
SF History photo permission forms	Paper	<ul style="list-style-type: none"> • Name • Address • Phone • Email • Project information 	Manager's office	SF History/BASC staff	3 months
SF History - Permission to Reproduce & Publish forms	Paper	<ul style="list-style-type: none"> • Name • Company • Address • Phone • Email • Date • Item(s) to be published • Purpose 	Photo Room	Photo Desk staff	Permanently
Deeds of Gift / donor acknowledgement letters	Paper	<ul style="list-style-type: none"> • Name • Address • Phone • Email • Wills • Estate plan • Next of kin 	SF History staff area	SF History staff	Permanently

Public Workstations & Circulating Technology

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Sign-up sheets (branches); "Express" use machines	Paper	First name: 12 branches Time: 6 branches (still asked?)	Librarian's desk, or a public area	Library staff and patrons	Sign-up sheets are shredded at the end of each day.

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Telus automated reservation system	Electronic	Patron barcode/PIN Workstation number	Computer room	IT staff	Data is deleted 24 hours after assigned time
Browser cache and history	Electronic	<ul style="list-style-type: none"> • Browser cache • Browser history • Temporary Internet files • Auto-complete information 	Local public PC only	Access only if PC has not been logged off.	Reboot is automatic when time has expired.
Laptops & Tablets	Electronic	No data is being kept.	N/A	N/A	N/A

Remote & Licensed Services

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Licensed databases	Electronic	Aggregate demographic information; Where personalization is available, users may supply name, email, and may store queries or results.	Vendor server	Vendor	Data is protected by confidentiality clauses in vendor contracts.
EZ Proxy	Electronic	URLs accessed via the proxy server; no patron data retained.	SFPL computer room.	IT staff	Data is purged automatically as disk space becomes inadequate. Could be retained 6 months or more.

Meeting Rooms

Data	Format	What data is recorded?	Where is it located?	Who has access?	How Long is Data Kept?
Request for use	Paper Electronic	<ul style="list-style-type: none"> • Date, time, and location requested • Purpose of meeting • Name and description of group • Name, address, and phone number of primary contact person • Name, address, and phone number of authorized contact person • WebEvent System • Group name • Primary contact person • Event description 	Paper to Public Affairs Office Online in WebEvent System	Public Affairs Staff WebEvent is on public web	Public Affairs office: 2 years WebEvent: deleted monthly
Billing for Meeting Rooms	Paper	<ul style="list-style-type: none"> • Name and address of person reserving room • Services being billed, with prices and total 	1) Finance Office 2) Public Affairs office 3) copy mailed to user	Finance Office staff; Public Affairs Office staff	Finance department retains data for 3 years onsite, 2 years offsite; Public Affairs office retains data for 2 years

Security Records

Data	Format	What data is recorded?	Where is it located?	Who has access?	How long is data kept?
Incident Reports	Electronic	<ul style="list-style-type: none"> • Name • Address • Telephone number • Driver's License 	Incident Tracker database (server? Cloud?)	SFPL staff	TBD

		<ul style="list-style-type: none"> • Date of Birth • Email? 			
Appeal Hearings	Paper files, electronic files, & audio cassette tape	<ul style="list-style-type: none"> • Audio recording of hearing • Paper copy of patron's Security File • Hearing Sign-In Sheet • Ruling Document • Hearing Appointment Letters for patrons without phone contact • Access Appeals Hearing Log • Access Appeals Hearing Schedule • Videos Related to Hearings 	Chief of Main's Office (will be transferred to the Facilities Office when new staff are on board) and L:\City Library (Library's internal network drive)	Chief of Main Office Staff (will be transferred to Facilities office in Spring or Summer 2015) and Access Appeals Hearing Officers	2007-present
Arbitration Hearings	TBD	TBD	TBD	TBD	TBD
Security Files	Paper & electronic files	<ul style="list-style-type: none"> • Notices of Suspension • Printed Incident Reports from before Dec. 2013 • Field Identity Cards • Photographs of patron • Videos related to incident • Correspondence with patron • Ruling Document from Appeals Hearings • SFPD Case number/Follow-up Card 	All materials kept at Security Office. 1 copy of Notice of Suspension retained at location where incident occurred.	Security staff and staff at location where incident occurred.	Security Office: 5 years Location where incident occurred: 1 year
Detailed Lookup ("List of Warned Patrons")	Electronic	<ul style="list-style-type: none"> • Name • Library card number • ID number • Action 	Access database on Library server	Security staff; Chiefs; 3634s; other?	Removed from staff view when suspension expires but record is retained in database for 5 years

		<ul style="list-style-type: none"> • Code of Conduct violation • Incident date • Suspension expiration date • Gender • Date of birth • Photograph • Race 			
Current List of Suspended Patrons (“List of Warned Patrons”)	Electronic	<ul style="list-style-type: none"> • Name • Suspension expiration date • Code of Conduct violation 	Access database on Library server	All staff	Removed from staff view when suspension expires but record is retained in database for 5 years

Volunteer Services

Data	Format	What data is recorded?	Where is it located?	Who has access?	How long is data kept?
Volunteer Information	Paper files and electronic	<ul style="list-style-type: none"> • Name • Address • Phone • Email • Emergency Contact • Reference • Conviction History (Self-reported unless working with youth) • Social Security # (if working with youth) 	<ul style="list-style-type: none"> • Software • Locked drawer in CPP 	Volunteer Program Coordinator	3 years