CCS

Revised Patron Code and Stat Classes Survey

Introduction

Please read through the August 15th How To Prepare post on the Migration Portal and complete the Revised Patron Codes and Stat Classes Survey by Monday, August 21st. If you are part of a multi-branch library and and your branches have different policies, please fill out a survey for each branch.

Name:

Email:

Library:

Revised Patron Code and Stat Classes Survey

Patron Codes

Patron codes define available services, loan periods, fines, and limits for specific groups of patrons. There will be a set of 5 codes that will be shared by all libraries in the system. These include:

1. **Reciprocal Patron: a non-CCS reciprocal patron**
2. **CPL Patron: Chicago Public Library patron**
3. **ILL Library: non-CCS libraries who have a patron profile for ILL purposes**
4. **Digital/Eresource Use: cards that only provide the user access to electronic and digital resources; does not have access to check out materials**
5. **In-House Use: institutional profiles used for library-related business (ex/ storytime card, technical services department card, collection management card)**

In addition to these five, each library will have 6 patron codes specific to their location. CCS reviewed data collection about patron loan limits from surveys and the current Symphony user profiles to identify six general patron codes:

1. **Patron: includes residents, non-residents, and business cards**
2. **Limited Use: reduced access card; may include students, temporary cards, or any user who would have different loan limits and/or fine thresholds than a regular patron card**
3. **Outreach: special services users, such as home services**
4. **Educational: includes both institutional school accounts and individual teacher accounts**
5. **Special Use: courtesy cards that, for example, may be issued to volunteers, city employees, community organizations, etc.**
6. **Exempt: users who are exempt from fines, which may include staff personal-use cards, library trustees, etc.**

Review the revised Patron Loan Limits Table for your library. This table includes fine thresholds, overall material limits, and hold limits for each profile.
- **1st Level Fine: the amount where a fine notification appears; allows libraries to remind patrons that fines are owed. Set to $0.01.**
- **2nd Level Fine: the fine threshold where the patron will be blocked from checking out**

materials.
- **Total Item Limit: the maximum amount of items the patron can have checked out on their card.**
- **Total Overdue: the amount of overdue items a patron can have before they are prevented from checking out additional materials.**
- **Total Holds: the total amount of holds a patron can have, either pending or available to pick up. If you do not want CPL Patrons or Reciprocal Patrons to pick up holds at your location, please indicate 0 in this column.**

While libraries are limited to 6 individual patron codes, they have the flexibility to rename them or change the loan limits to best suit their user groups.

Does your library wish to revise any of the 6 library-specific patron code titles?

◯ No, my library will use the patron code titles listed here.

◯ Yes, my library wishes to rename one or more of the patron codes. See below for changes:

Does the Patron Loan Limits Table accurately reflect your library's fine thresholds, total checkouts, total overdues, and holds for each patron code?

◯ Yes, the Patron Loan Limits Table accurately reflects my library's thresholds and limits.

◯ My library would like to adjust one or more of the thresholds and limits listed. See below for changes:

Patron Statistical Classes

Patron statistical classes will now be shared between all libraries and will assist in generating comparative patron reports. CCS has developed the following list of patron statistical classes based off of current Symphony user profiles:

- **Business**
- **City/Village Employee**
- **Home Services**
- **ILL - Inside IL**
- **ILL - Outside IL**
- **Library Board**
- **Nonresident Fee Card**
- **Nonresident Taxpayer**
- **Organization**
- **Outreach**
- **Resident**
- **School**
- **Staff**
- **Student**
- **Teacher**
- **Temporary Resident**
- **Volunteer**

Does the current list of Patron Statistical Classes accurately reflect the **comparative** reporting needs of your library?

○ Yes, the current list of Patron Statistical Classes accurately reflects the comparative reporting needs of my library.

○ My library would like to suggest additional patron statistical class(es) based on our comparative reporting needs:

Polaris Material Types

The revised Polaris configuration gives libraries the flexibility to limit circulation to local patrons, CCS patrons, or all patrons (including Chicago Public Library and non-CCS reciprocal borrowers) based on material type.

Review the list of Polaris Material Types and consider if there are any material types that should be restricted to just local patrons, CCS patrons, or all patrons.
  Example: only local patrons are eligible to check out your library's Videogame Hot materials.
  Example: only CCS patrons (not CPL or non-CCS reciprocal patrons) are eligible to check out your library's Launchpads

Notes:
- **Acess to eContent (eAudiobooks, eBooks, eVideos, eMagazines) will still be managed by the content vendor.**
- **The option to make an individual item or group of items such as reference books non-circulating can be selected in the individual item's record or by using the bulk change feature.**

Using the list of Polaris Material Types, indicate which material types are eligible to be checked out by local patrons only:

Using the list of Polaris Material Types, indicate which material types are eligible to be checked out by CCS patrons only (*not* by Chicago patrons or non-CCS reciprocal borrowers):

Bonus Data Mapping Question!

Parent/Guardian Entry

In Polaris, there will be a dedicated field in the patron's record to indicate the name of the parent or guardian of a minor patron. In order to transfer the parent/guardian data correctly from Symphony to Polaris, we need to verify where libraries currently store the information.

Example: in the address field as a c/o line
Example: in the extended info tab (please name field used)

Where does your library store parent/guardian information for minor patrons in Symphony? Be specific as possible.