MORE Executive Committee meeting information

February 4, 2022

6. Review of CVTC Patron Records policy draft

Below is a draft of a policy for CVTC patron records, to be considered for approval by MORE Directors Council as a stand-alone policy, or part of the existing [MORE Patron Registration Policy](). I also plan to discuss this with CVTC Library leadership and the MORE Operations Committee before brining a recommendation to MORE Directors Council.

Questions for Exec today:

1. Does this seem reasonable from a patron access standpoint, with the assumption that CVTC will continue to offer their own online catalog to allow online access to CVTC and MORE resources without staff intervention?
2. Will staff be able to easily understand and communicate this policy to affected patrons?
3. Does this policy ensure that patrons are accountable for materials borrowed from MORE-member libraries?
4. Anything missing, unclear, or odd?

CVTC patron records will be automatically loaded into the MORE patron database each week from the college's records

For each week's updated patron load:

- Existing records for continuing CVTC patrons will remain unchanged
- CVTC patron records for those who are no longer affiliated with CVTC, owe no money, and have no materials checked out will be deleted
- CVTC patron records for those who are no longer affiliated with CVTC but owe money, and/or have materials checked out will be retained. When possible, these accounts will be merged with existing MORE accounts.
- New CVTC patron records will be loaded with a distinct PTYPE, an MBLOCK, and no ACT150 LOC value

CVTC patron records will include the data required in the [MORE Patron Registration Policy]() except the ACT150 LOC fixed-field value, and will have a distinct PTYPE, an MBLOCK, and a patron message with staff instructions.

Individuals may have both a CVTC patron record and a patron record from a MORE-member public library. Either account will work to borrow materials from MORE-member libraries and access online resources provided by MORE.

Only CVTC patron accounts may access certain resources from CVTC.

Upon loading, each CVTC patron record will have a blank ACT150 LOC field, and will have an MBLOCK that will prevent the CVTC patron from borrowing materials from MORE-member libraries, or placing holds via the MORE Online Catalog. Once the patron verifies their place of residence with a MORE-member library staff person, staff should:

1. Enter an ACT150 LOC value matching the patron's place of residence
2. Remove the MBLOCK
3. Remove the patron message with staff instructions

The CVTC patron can then use their CVTC record to borrow materials from MORE-member libraries and access functions of the MORE Online Catalog, including placing holds.