



Evergreen Indiana Patron Confidentiality Policy And Ethics Form

This policy establishes the guidelines for the protection of personally identifying information contained in library records or accessible within the library or through its computer systems.

1. A "Patron Record" is defined as information created, received, maintained, or stored by a library, in any format, that:
 - a. identifies a person as having requested or obtained specific materials and/or information from a library, including database search records, or
 - b. identifies a library patron by name, address, telephone number, e-mail address, or any other similar manner, or
 - c. otherwise links a library patron with identifiable uses of library materials, facilities, or services.
2. A "Member Library" is an Indiana library that by means of executing the Evergreen Indiana Membership Agreement has joined the Evergreen Indiana Consortium. For the purpose of this Patron Confidentiality Policy, "Member Library" shall be interpreted to include the Indiana State Library.
3. A "Home Library" is a Member Library System where the user is registered for library service.
4. Only the authorized staff members, independent contractors, and other authorized agents of Member Libraries shall access Patron Records, and such access shall occur only as needed when acting within the scope of duty in the administration and maintenance of the Evergreen library system and in administering library transactions.
5. Staff of Member Libraries shall not disclose or release Patron Records to any person other than the patron named in the record (i.e. the library card holder), unless the requestor is also the person who signed to accept financial

responsibility for the card holder. The requestor must present the library card or current ID to receive this information.

6. Disclosure or release of a Patron's Records to a third party shall only occur upon the Member Library's receipt of a valid subpoena, court order, signed written consent of the patron, or other legal process, unless such disclosure falls under the access permissions noted in provision #4.
7. In the event of the receipt of a valid third party Patron Record request, a Member Library shall only disclose or release the Patron Records of a person whose Home Library is that particular library.
8. The Member Library's Director and/or Board, along with legal counsel when necessary, shall be responsible for determining whether or not a third party Patron Record request is valid and should therefore be satisfied.
9. In the event a third party Patron Record request is received by a Member Library that is not the Indiana State Library, the member library shall notify the Evergreen Indiana Library Consortium Director via email.
10. In the event the Indiana State Library is presented with a valid third party request for Patron Records, the Indiana State Library will contact the patron's Home Library and the Indiana State Library and the Home Library shall coordinate the disclosure or release of Patron Records, as appropriate.
11. Any Evergreen patron requesting by telephone a list of items checked out on a specific account must use the account barcode number. Library staff shall not give out any specific information without the account barcode number. Without the account barcode number, staff may only give out the number of items due and the due date.
12. For purposes of compiling statistics, borrower information linked with specific item information shall not be displayed or listed.
13. Evergreen Indiana Library Consortium prohibits employees of Evergreen Indiana Library Consortium and staff of Member Libraries from uploading or entering personal identifying information obtained from the ILS or generated by ISL reports to any AI product.
14. Each Member Library is responsible for ensuring its staff are aware of and comply with these privacy policies.
15. In the event that local library policy conflicts with Evergreen Indiana policy, Evergreen Indiana policy supersedes local policy.

EVERGREEN INDIANA CODE OF ETHICS

I acknowledge that I have an obligation to the Evergreen Indiana Library Consortium and agree to comply with this Code of Ethics:

- I acknowledge that I have read and shall not violate the Evergreen Indiana Patron Confidentiality Policy.
- I shall not use knowledge of a confidential nature to further my personal interests or for personal gain for myself or others.
- I shall use the Evergreen Indiana software only for the purposes intended.
- I shall keep my knowledge of Evergreen software, and Evergreen Indiana policies and procedures up to date.
- I will participate in the Evergreen Indiana community, as applicable.
- I shall accept full responsibility for the work I perform.
- I shall cooperate with other Evergreen Indiana members, treating them with honesty and respect.
- I shall avoid conflict of interest.
- By my signature I acknowledge I've read and understand the Evergreen Indiana Code of Ethics and Patron Confidentiality Policy. If I am a Library Director, I will take all steps necessary to ensure that persons working with Evergreen Indiana on behalf of the Library will sign this agreement which will be retained and made available if requested by Evergreen Indiana.

Signature

Date

Printed Name

Library Name

Adopted by the Evergreen Indiana Executive Committee on March 10, 2009. Updates approved by the Evergreen Indiana Executive Committee on June 16, 2026.