Resource Sharing Alliance Printed Documents Including Patron PII
Approved 9/1/2021, effective 9/15/2021

In the interest of protecting patron Personal Identifying Information (PII), RSA asks that all members limit the information included on receipts.

This policy covers:
- Checkout/Renewal Receipts (Date due slips)
- Transit slips
- Hold slips
- Hold wrappers
- Printed Notices (Overdue Notices, Bill Notices, etc)
- Printed Picklists or Onshelf Items Lists
- Any other printed documentation including Patron PII

Do not include User Name or User ID on Checkout, Renewal, or Transit Slips.

If using Hold Wrappers, libraries should limit characters in the User Name and Patron ID using the property settings in Workflows.

Limit patron information appearing on Available Hold Slips to the minimum necessary to contact and alert patrons to their available hold. Available Hold Slips are for internal library use only and should not be given to the patron with their materials or placed in available holds on a self-service hold pickup shelf. These slips should be shredded or otherwise securely disposed of when no longer needed.

Libraries often need to print lists or report outputs which include PII (such as printing Bill Notices and Overdue Notices for shelf-searching, Picklists or Onshelf Item Lists, or reports generated in BlueCloud Analytics). They must also be shredded or otherwise securely disposed of once they are no longer needed.

Other Considerations:

Patron PII may appear on other documents, such as library card application forms, program registration information, reader's advisory forms, computer use policies, etc. Please ensure that these documents are stored in a safe and secure manner.

These slips and any printed materials including patron PII (Onshelf Items Lists, Picklists, Bill Notices, Overdue lists, etc) should be shredded or otherwise securely disposed of when they are no longer needed.