



## eCARD - Enhanced Patron Self-Registration

### What is eCARD?

Since 2006, the eCARD service has been allowing patrons to self-register for a library card online. eCARD verifies, standardizes and registers the patron in real time into your ILS. Addresses are validated via an approved postal service database provider. eCARD can also provide residency verification of the patron beyond address standardization, such as name validation.

When a patron enters a valid postal **address and the address entered falls within the library's** service area, the software will allow creation of the patron record. Registrations make use of ILS APIs or existing registration process. Upon successful registration, a confirmation will be displayed to the patron and optionally a confirmation email can be sent to the patron.

Each implementation is customized due to the specific registration policies set by each library and use of additional verification data, such as county assessor data.

### Hosted Service and Customization

The eCARD **address verification system is hosted on Quipu Group's servers.** The library will create a single **web page on the library's website to display the registration** and confirmation form. **Quipu will supply the necessary technical information for the library's web page to display** the eCARD registration form and interact with the verification system. This allows the library to display the registration form with-in the current style of the library's website.

If the ILS API is used, **our hosting server will need access through the institution's firewall to** the ILS API.

Customization is available which allows for the implementation of unique library requirements/policies, such as a Spanish registration form, non-resident access, juvenile registrations, etc. as determined by the library.

### Address Verification and Form fields validation.

Basic level of verification is limited to validating that the address is a valid postal address and **the address is within the library's defined service area.**

The registration form will validate required fields and syntax rules, along with email validation.

## Service Areas

Service area is determined by the library and can be based on zip codes, city, county, and/or state. The library is also able to set individual parameters, such as particular cities, where the registration would be mediated or denied. For example, allowing registration for addresses in a particular county, except for a specific city **which doesn't pay library district taxes. Registrations** from excluded cities would be denied.

Other customized policies have included Reciprocal agreements and military personnel registrations.

## Name Verification (Basic)

In addition to basic address verification, eCARD can optionally check to see if the name entered on the registration form is associated with the given address.

## Name Verification (Advanced)

Online identity confirmation can be added at an additional cost. This provides extra verification based on the patron's name, address, date of birth and email address.

## Additional Verification Data

eCARD can incorporate the use of additional data to further refine the registration process. Additional data has included county assessor and state provided data that is integrated into the eCARD service. For example, using county assessor data to limit registrations (based on library district taxes paid) and to determine the incorporated/unincorporated status of the address. State data has been used to match a patron's address to an appropriate library district where there has been overlapping districts within one county. There is an additional charge for incorporating and standardizing Additional data.

## Registration & Policies

eCARD is setup to work as closely to your registration policies as possible. This includes support in discussing the capabilities of the ILS in relation to barcode assignment, data that can be used in the patron record, expiration date settings and levels of access/restrictions for an online registrant.

## At Library Registrations

eCARD can be set up to handle registrations performed at the library's branches, allowing patrons to use a library computer/tablet to create the initial patron registration. eCARD will detect, usually based on IP Ranges, that the patron is registering from a specific library. eCARD can be customized to handle unique "At Library" registration settings vs. online registrations.

### Multiple Language Support

eCARD includes English and Spanish registration forms and error messaging. Quipu works with the library to develop additional language implementations.

### Multiple Libraries/Consortia

eCARD can also work for consortia with utilizing a shared ILS. For consortia with multiple ILS systems discount pricing for the group can be explored.

### Patron Privacy

Patron privacy is accomplished by use of SSL connections to our server and your ILS. Also any patron data stored by the eCARD service (optional) is encrypted using AES encryption.

### Current eCARD Libraries

#### *CARLx ILS*

Contra Costa County Library, California  
Los Angeles Public Library, California  
Metropolitan Library System, Oklahoma  
Monroe County Library System, NY  
SPLASH, Solano County Library, California

#### *Polaris ILS*

Brazoria County Library System, Texas  
Chattahoochee Valley Libraries, Georgia.  
Lake County Public Library, Indiana.  
Phoenix Public Library, Arizona.  
Pierce County Library, Washington.  
Sno-Isle Libraries, Washington.

#### *Sierra ILS*

Toledo Lucas County Library, Ohio  
San Francisco Public Library, California  
Saint Paul Public Library, Minnesota  
London Public Library, Ontario California

#### *Symphony ILS*

Houston Public Library, Texas

## Pricing

Pricing is dependent on finalization of a number of factors and will be fully quoted before the eCARD project begins.

### Setup Fees

Consortia Setup (Shared ILS)	\$12,000.00
Single Library Setup	\$ 8,000.00

- Setup of service on Quipu's server.
- Supply documentation and work with library in setting up library's web page to contain the eCARD registration/confirmation forms.
- Connection to library's ILS system to create the new patron record.
- Work with library to determine service area policies.
- Development of English and Spanish implementations.
- Basic address standardization.
- Determination of registration form fields, syntax rules, display and ILS capabilities.

### Optional Setup Costs

- Additional languages \$500.00 per language
- Additional library portals (Consortia) \$1,000.00 per library
- Name Verification (Basic) \$1,000.00
- Name Verification (Advanced) Additional cost, quoted upon request
- Additional Verification Data Additional cost, quoted upon request

### Annual Fees

Annual Fees include hosting, maintenance and support.

- Verification Services (Unlimited): \$3,000.00 - \$8,000.00  
Based on population served
- Name Verification (Advanced): Additional cost, quoted upon request
- Additional Verification Data Updates: Additional cost, quoted upon request