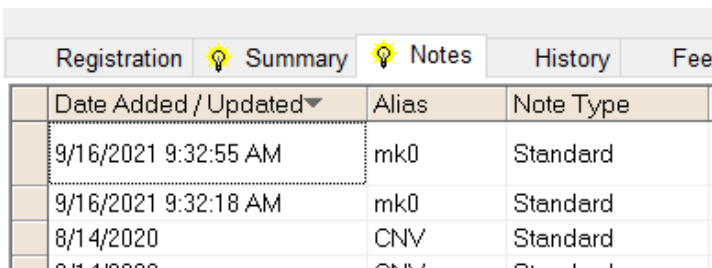


Inserting a Note into a Patron Record

In CARL-X and Connect, staff can enter Notes into a patron record to notify staff of pertinent information or an urgent matter. Adding Notes can be done by going into the patron record through the checkout process, renew or by searching for the patron record. Depending on the reasoning for the note will determine what type of note to put on the account. An **Urgent Note** by itself with a status of GOOD will prompt staff but will also stop patrons from checking out, renewing items, and placing holds. A **Standard Note** by itself will **NOT** prompt staff. **Informational Notes** will allow prompt staff while allowing patrons to use their account.

CARL-X

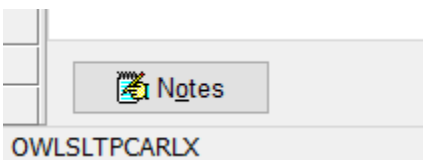
1. Open the patron's record through Charge, Renew or the Patrons module.
2. Once in the patron record, click on the Notes tab.



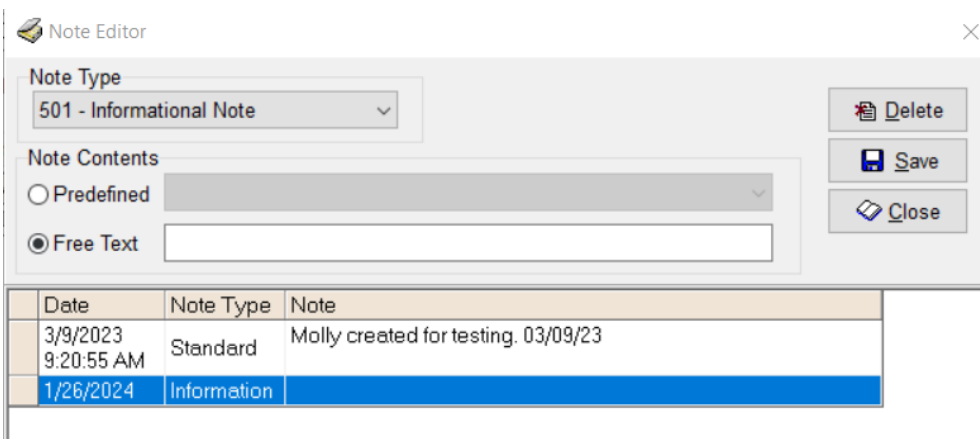
The screenshot shows a tabbed interface with 'Notes' selected. Below the tabs is a table of notes.

Date Added / Updated▼	Alias	Note Type
9/16/2021 9:32:55 AM	mk0	Standard
9/16/2021 9:32:18 AM	mk0	Standard
8/14/2020	CNV	Standard

3. In the Notes section, click on the Notes button near the bottom left of the window.



4. If you want staff to be informed of the noted information the next time the patron comes in, then use the **Informational Note** from the Note Type dropdown.
5. Choose Free Text to type in your message/note. Please add your initials and the date.



The screenshot shows the 'Note Editor' dialog box. It has a 'Note Type' dropdown menu set to '501 - Informational Note'. Below it, there are radio buttons for 'Predefined' and 'Free Text', with 'Free Text' selected. A text input field is provided for the note content. On the right side, there are buttons for 'Delete', 'Save', and 'Close'. Below the dialog box, a table shows the list of notes.

Date	Note Type	Note
3/9/2023 9:20:55 AM	Standard	Molly created for testing. 03/09/23
1/26/2024	Information	

6. Click Save and Close when done.

Inserting a Note into a Patron Record

Connect

1. Open the patron's record through Check Out (user overview > user information), or User Lookup.
2. Once in the patron record, click on "add a note" to expand the section.

user information | check out | MyAccount

user id & information user overview

USER ID	21389006120325	ALTERNATE ID		USER GUID	100000001136607	STATUS	Overridden
FIRST NAME	Doreen	MIDDLE NAME	TESTY	LAST NAME	Lawlor	SUFFIX	
FULL LEGAL NAME				DATE OF BIRTH	11/14/1956		
USER CARD TYPE	Community Card - Clintonville	EXPIRATION	3/15/2024	USER SIGNATURE	edit		

expand all

staff notes add a note

Standard Note - Molly created for testing. 03/09/23 mk0, 3/9/2023 | edit | x

address information

3. If you want staff to be informed of the noted information the next time the patron comes in, then use the **Informational** from the Note Type dropdown.
4. For a Free Text note, start typing out your note in the Note Text field. Please add your initials and the date.
5. Click Save Note once you are done.

staff notes add a note

NOTE TYPE	PREDEFINED NOTE OPTIONS	NOTE TEXT
Standard	NONE SELECTED	enter note text here
Standard		
Informational		
Urgent		

Cancel **Save Note**

Standard Note - Molly created for testing. 03/09/23 mk0, 3/9/2023 | edit | x