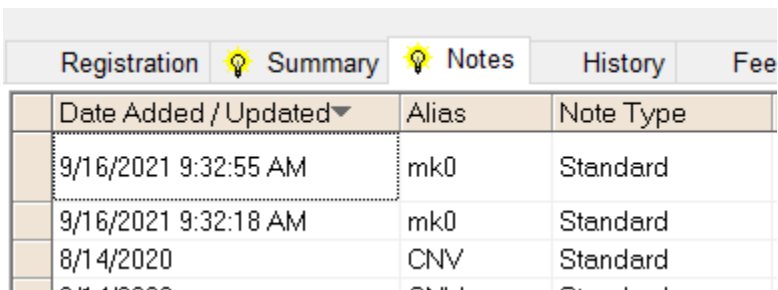


Inserting a Message into a Patron Record

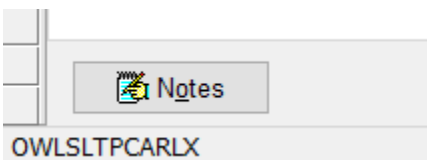
In CARL-X, staff can enter Notes into a patron record to notify staff of pertinent information or an urgent matter. Staff cannot do this in Connect. Adding Messages (Notes) can be done by going into the patron record through the checkout process or by searching for the patron record.

1. Open the patron's record by clicking on "Patron Information" at the bottom of the window when in Checkout. Or in the Patron function, scan the patron barcode or search for their name/birthdate.
2. Once in the patron record, click on the Notes tab.

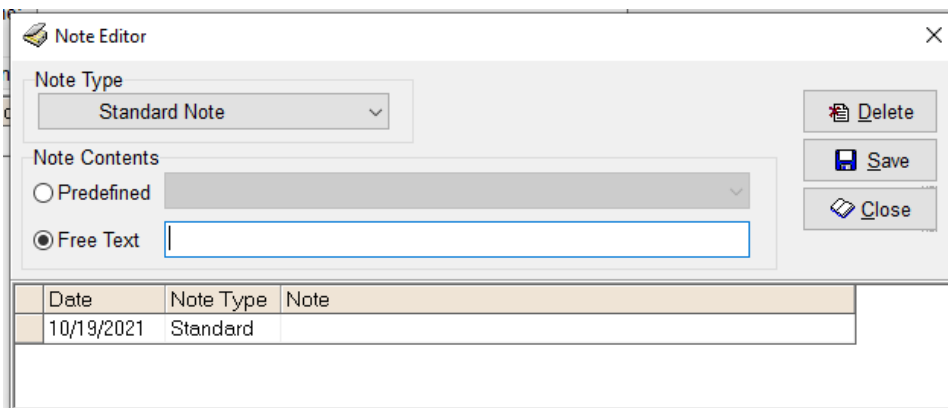


Date Added / Updated	Alias	Note Type
9/16/2021 9:32:55 AM	mk0	Standard
9/16/2021 9:32:18 AM	mk0	Standard
8/14/2020	CNV	Standard

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



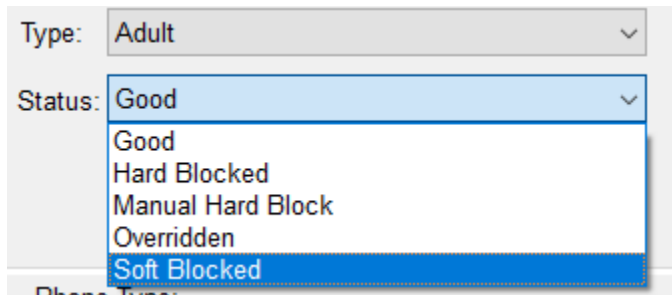
4. If you want staff to be informed of the noted information, then use the Standard Note. Using a Standard Note **WITH** a soft block will only prompt staff when the patron barcode is scanned. It will not restrict patrons from renewing or checking out.
5. Select Standard Note from the Note Type dropdown and then choose Free Text to type in your message/note. Please add your initials and the date.



Date	Note Type	Note
10/19/2021	Standard	

Inserting a Message into a Patron Record

6. Click Save and Close when done. Back in the patron account, select Soft Block* from the Status dropdown. And Save.



The image shows a portion of a web form for editing a patron record. The 'Type' dropdown is set to 'Adult'. The 'Status' dropdown is open, showing a list of options: 'Good', 'Hard Blocked', 'Manual Hard Block', 'Overridden', and 'Soft Blocked'. The 'Soft Blocked' option is highlighted in blue, indicating it is the selected choice. Below the status dropdown, the text 'Phone Type:' is partially visible.

*If a patron has a status other than Good, then leave it as is. Do not change it to Soft Block. Adding the Soft Block is what's going to tell the system to notify staff with a Big Red Box at checkout.

Depending on the reasoning for the message/note will determine what type of note and/or block 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. The status needs to change in order to prompt staff of the Standard Note.