



**Patron Notes Guide**

**Last updated: September 26, 2025**

**Contents**

Creating a Patron Note ..... 1

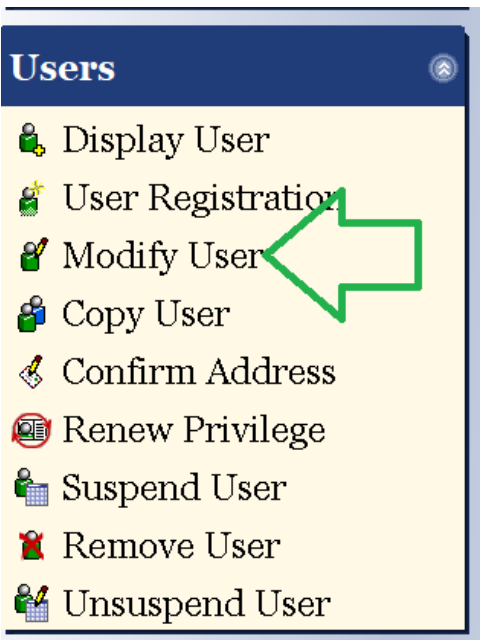
Removing a Patron Note ..... 4

**Creating a Patron Note**

Library staff have the ability to place a note on a patron’s account that will be seen when they use their card at any RSA library.

Please remember to be circumspect in your note. The patron may ask to see it.

To create a note, use the Modify User Wizard to edit the account.



Go to the Extended Info Tab.


**Modify User \***

Identify User

Name: NASLUND, RORY E  
Id: SNDEMO1  
Group ID:  
Profile name: ADULT...

User ID: SNDEMO1

Basic Info Privilege Demographics Addresses **Extended Info**




There are 4 types of notes that can be added: Note, Comment, Lost Item and Alert Popup. All notes will show on the patron account, however if this is something pressing, using the Alert Popup will cause a popup box to appear before any action can be taken with their card.

These notes will be visible to staff at all RSA member libraries, so make sure that your notes are clear and informative. Make sure to include the date, your initials and the library. If a note can be removed once that action is taken, please include a phrase similar to "Please delete when finished."

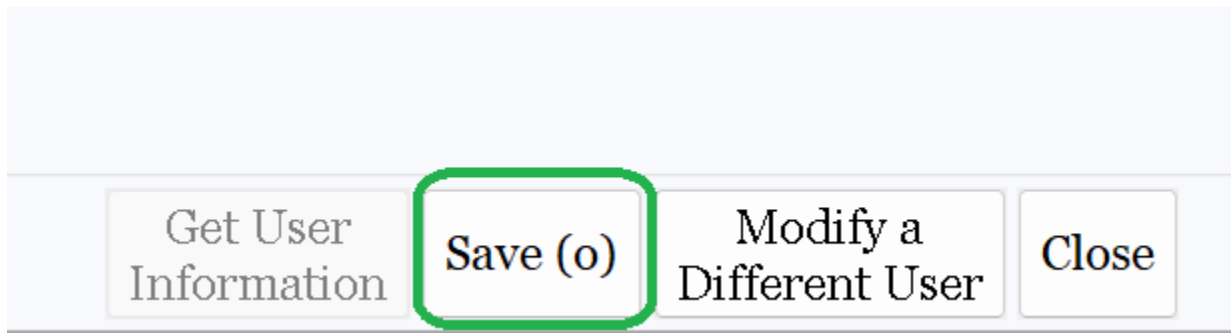
Basic Info Privilege Demographics Addresses **Extended Info**

NOTE  
COMMENT  
LOSTITEM  
STAFF  
INACTVID  
ACTIVEID  
PREV\_ID  
PREV\_ID2  
ALRT\_POPUP

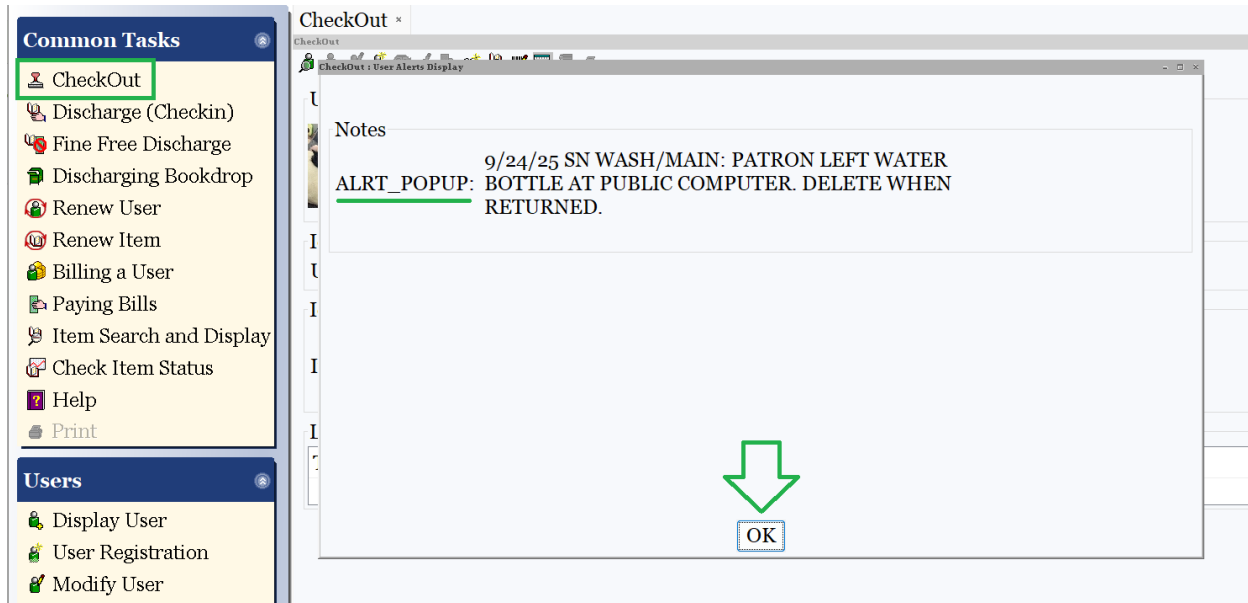
9/24/25 SN WASH/MAIN: PATRON LEFT WATER BOTTLE AT PUBLIC COMPUTER. DELETE WHEN RETURNED.



After you have added whatever information, you wish to add, hit save.



Information in the Alert Popup line will cause a Pop-Up alert in both the Checkout and Display User Wizards. Please note that the Pop-Up window will also include pre-existing notes and the usual information about fines and available Holds, etc.



All notes will show in the upper right-hand corner of the checkout screen.



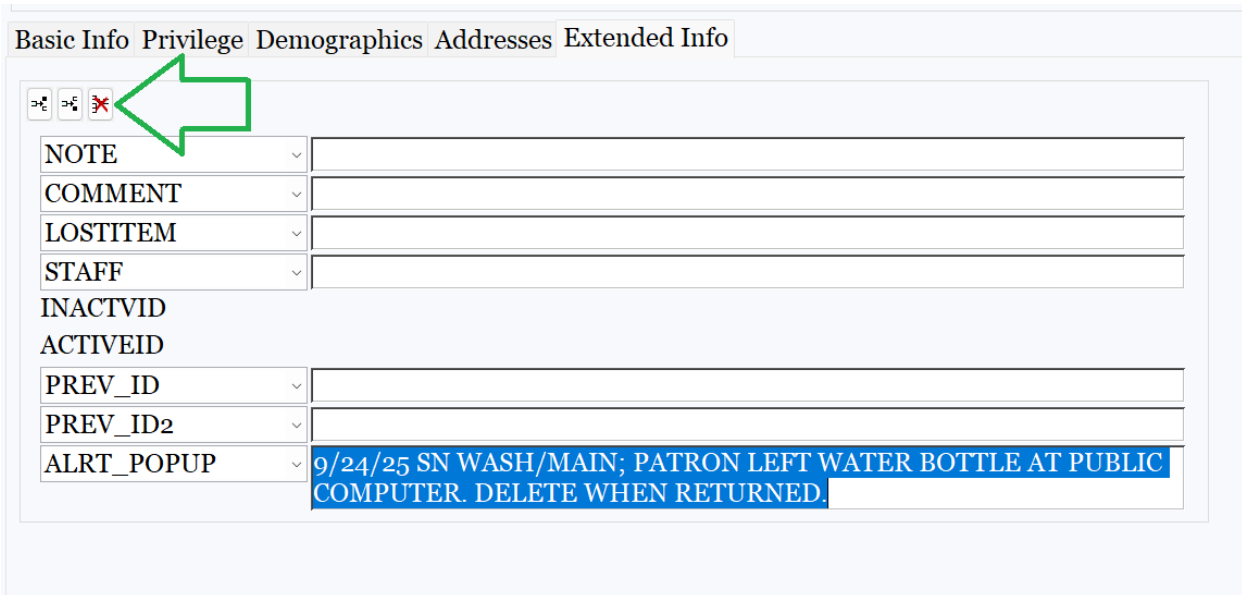
## Removing a Patron Note


Once the information in the note is no longer needed, the note should be removed. To remove an Alert Popup, the Alert must be completely removed.

To completely remove the note:

Find the user's account using the Modify User wizard and click on the Extended Info tab. Select the Alert that you wish to remove by clicking in the note field.

Click on the Delete Row button.



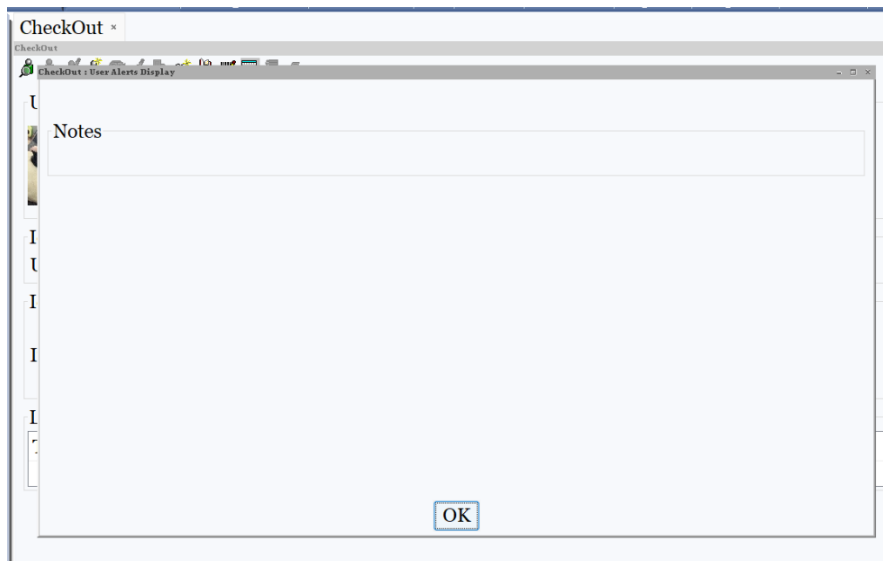
Basic Info		Privilege	Demographics	Addresses	Extended Info
					
NOTE	▼				
COMMENT	▼				
LOSTITEM	▼				
STAFF	▼				
INACTVID					
ACTIVEID					
PREV_ID	▼				
PREV_ID2	▼				
ALRT_POPUP	▼	9/24/25 SN WASH/MAIN; PATRON LEFT WATER BOTTLE AT PUBLIC COMPUTER. DELETE WHEN RETURNED.			

This will remove the entire row from the screen. Once you hit Save, the line will reappear but be empty.

## Basic Info Privilege Demographics Addresses Extended Info

NOTE	
COMMENT	
LOSTITEM	
STAFF	
INACTVID	
ACTIVEID	
PREV_ID	
PREV_ID2	

A note can also be removed by clicking into the box and deleting the text. However, this does not remove the alert popup box, only the content, which will cause an empty box to pop up during checkout. It is not recommended to remove a note in this way.



Contact the RSA Help Desk at [help@rsanfp.org](mailto:help@rsanfp.org) or at 866-940-4083