Notes are added to patron records for a variety of reasons throughout the school year. Patron Notes can be used to:

- alert staff to special issues regarding individual patrons, such as outstanding fines and changes in borrowing privileges.
- communicate reminders to staff about a patron, such as the patron is looking for items on a specific subject.

When a note exists for a patron, a note icon appears next to the barcode when a patron account is retrieved in Circulation. The note may be read by clicking on the barcode link or switching to Patron Status.

If the note has been flagged as important, the message appears automatically at the top of the page when a patron account is retrieved in Circulation.

**Creating Notes**

1. Open the patron record by selecting Circulation > Patron Status and entering the patron name or barcode.
2. Click Add Note and enter the text of the note. This field is limited by 1000 characters.
3. To flag the note as important, select the Display this note whenever... check box.
4. Click Save Note.

In the Patron record, multiple notes appear in date added/updated order with the most recently note displayed at the top of the list.

Notes may be edited by clicking the edit icon or deleted by choosing the trash can icon.

**Globally Deleting Notes**

Some districts prefer that student records do not carry forward to the next school year with any notes about fines and lost books.
To review all the existing notes, create a report in Report Builder to include patron names and notes.

To globally delete all patron notes, select Back Office > Patron Update > Delete