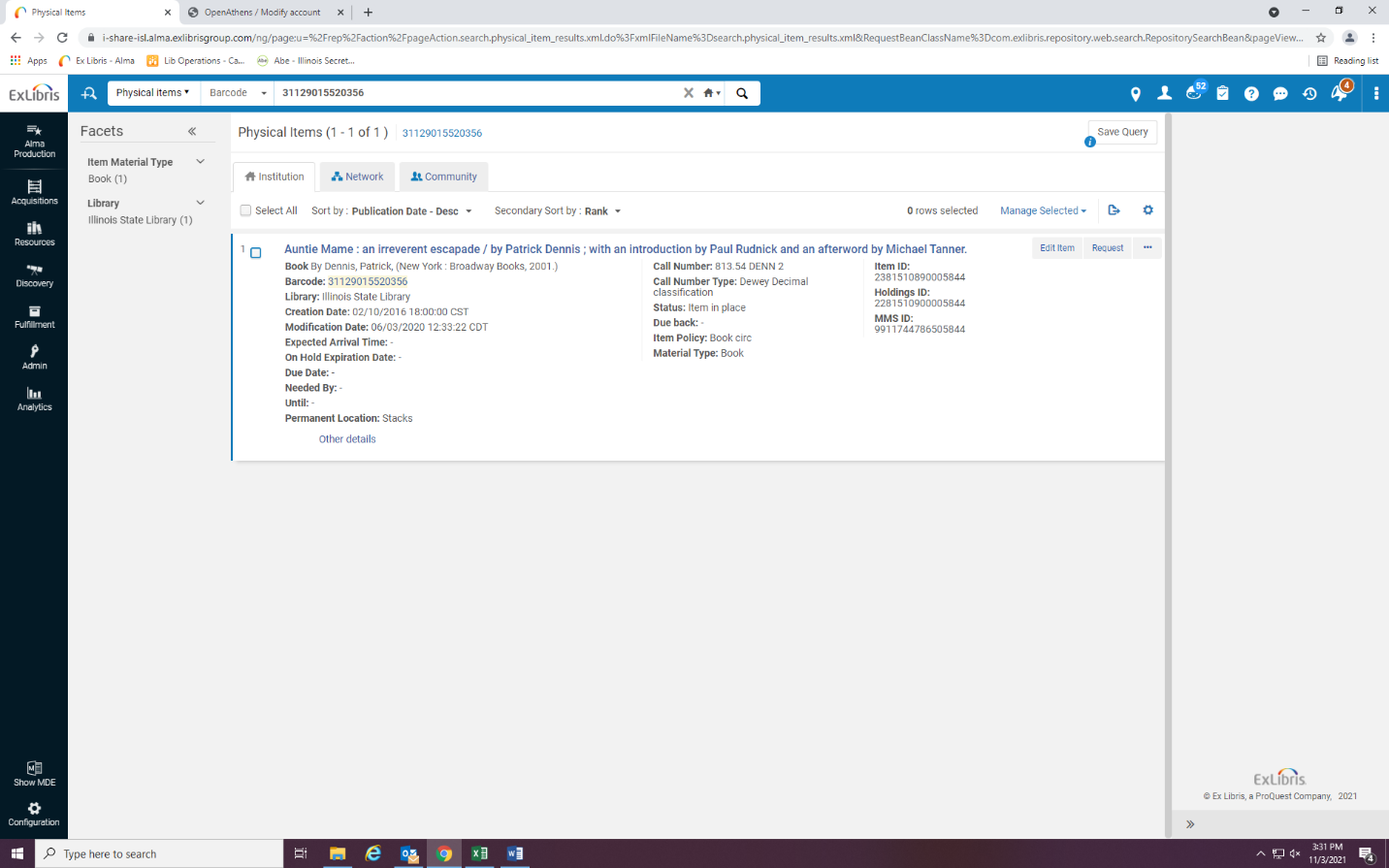
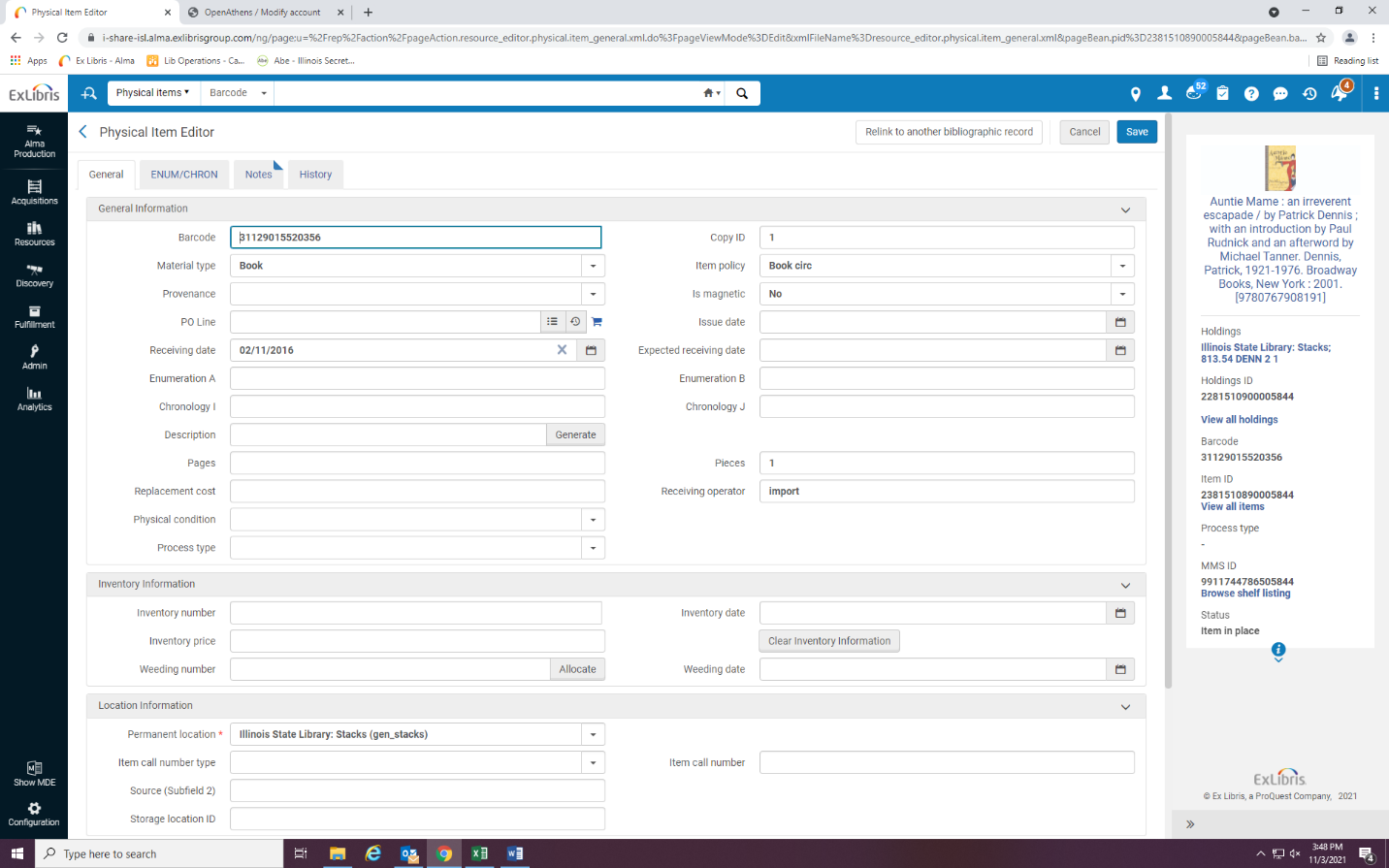
**Adding a Note to an Item or Patron Record**

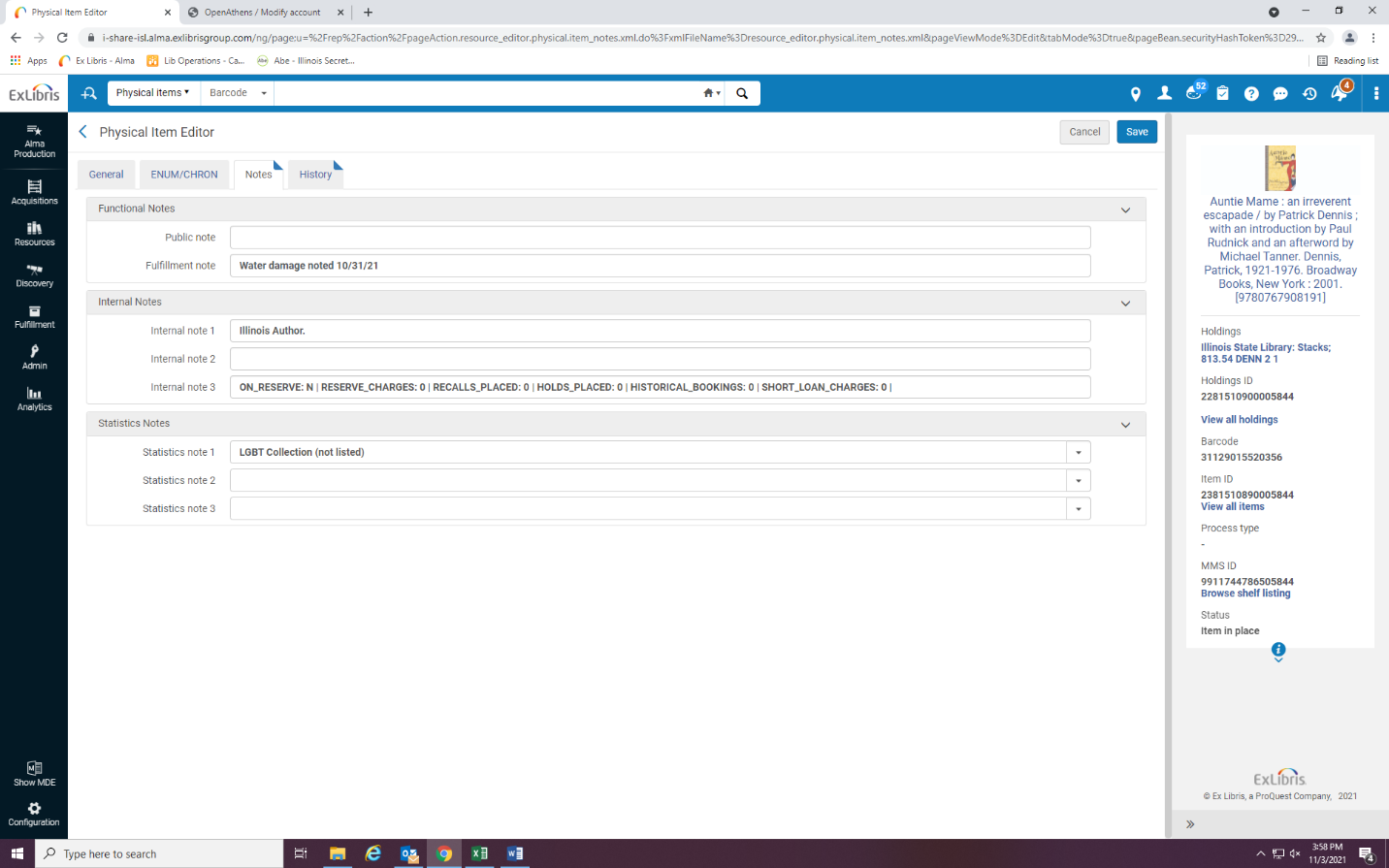
Due to various circumstances, sometimes a note will have to be placed on an item or patron record. These circumstances can include: noting damage, noting a mistake in the record, putting a charge-and-send notice for a state employee, or when a patron lost an item.

To put a note on an item record:

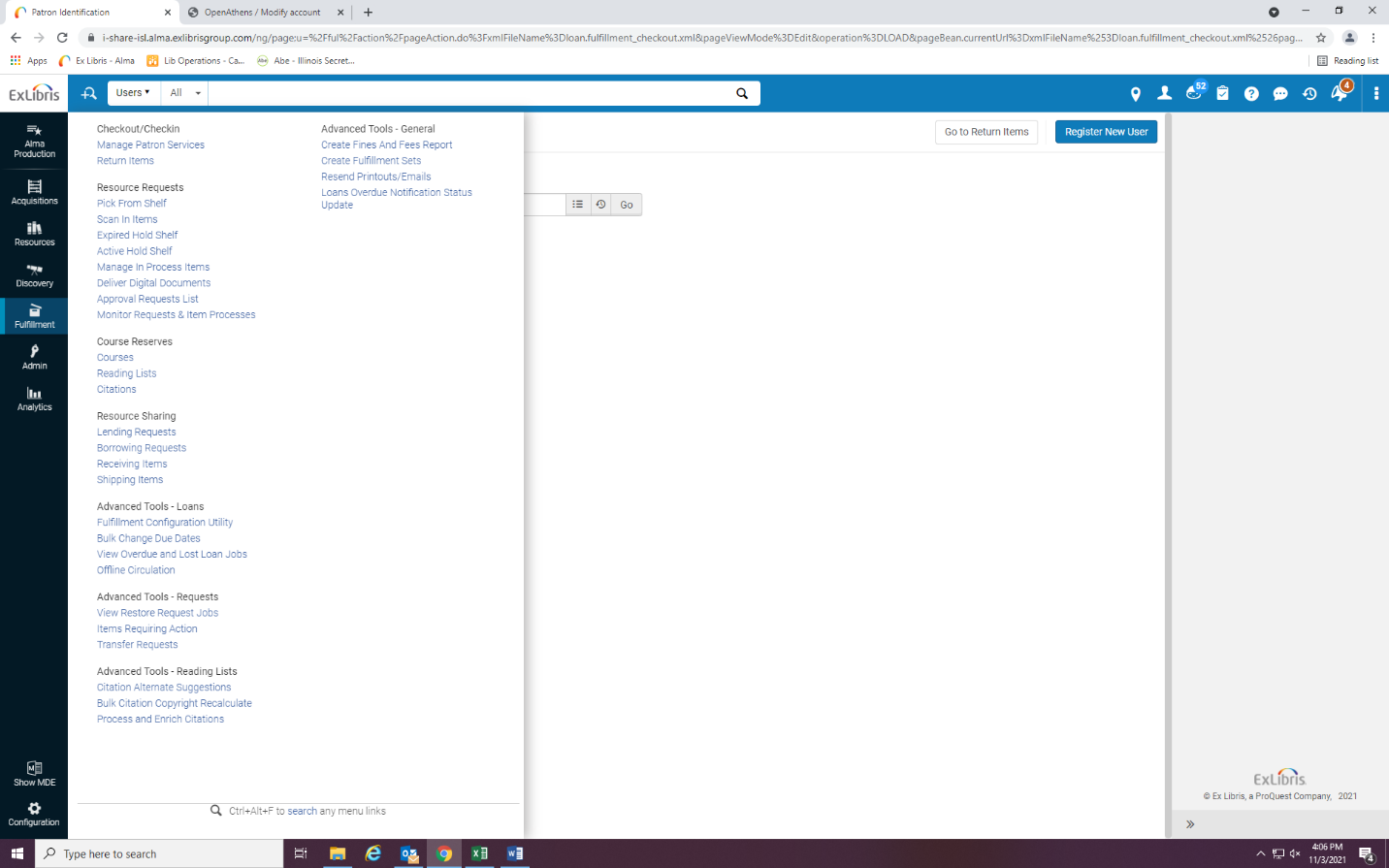
Pull up the item record in Alma by clicking on **Physical Items** in the search barand scanning the barcode, then click on **Edit Item**.

You are now in the **Physical Item Editor** page, which will open on the **General Information** page. You will place the note on the **Notes** page, so click on the **Notes** tab.

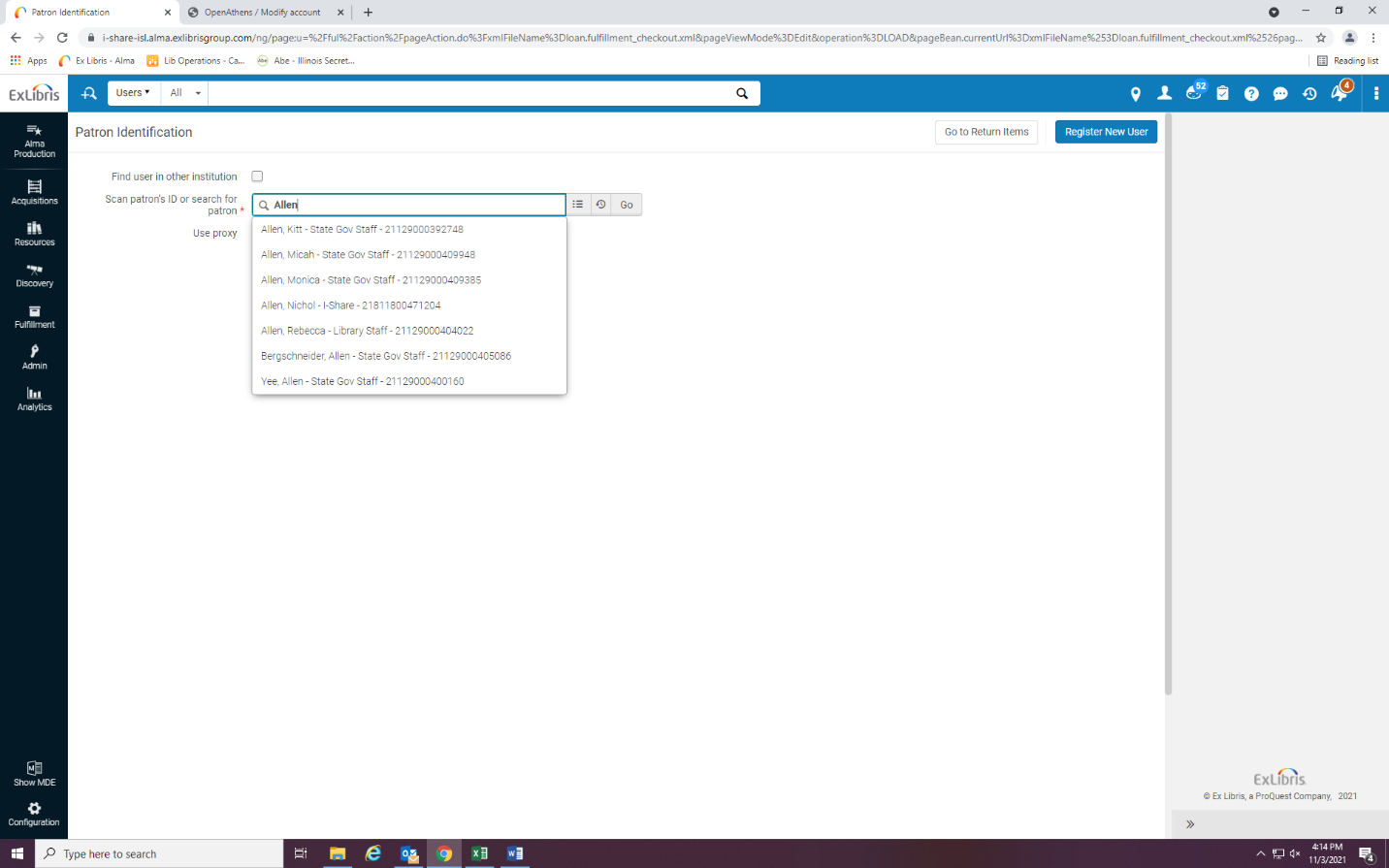




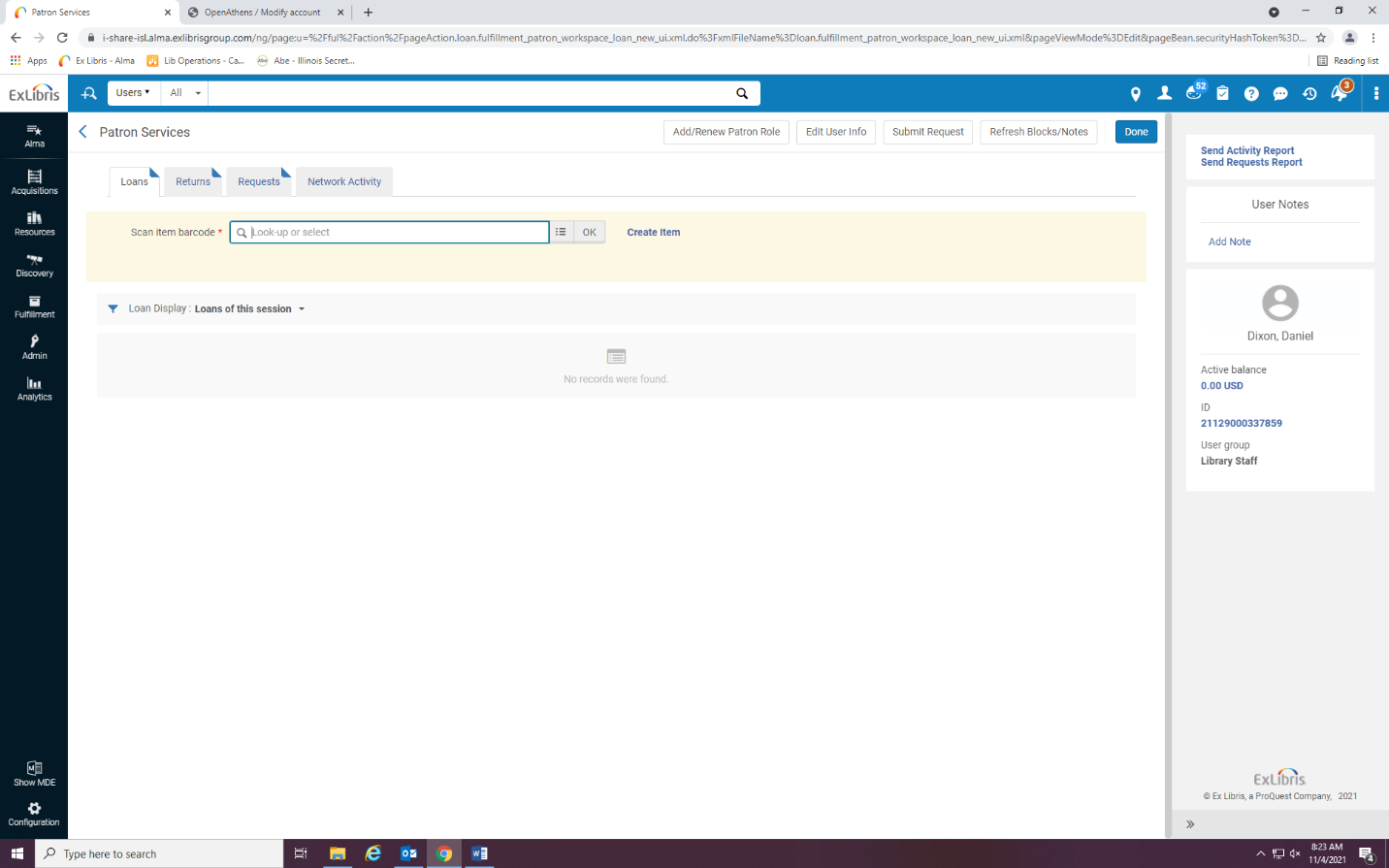
Write the note in the **Fulfillment Note** field, and press **Save**.

**To put a Note on a Patron Record:**

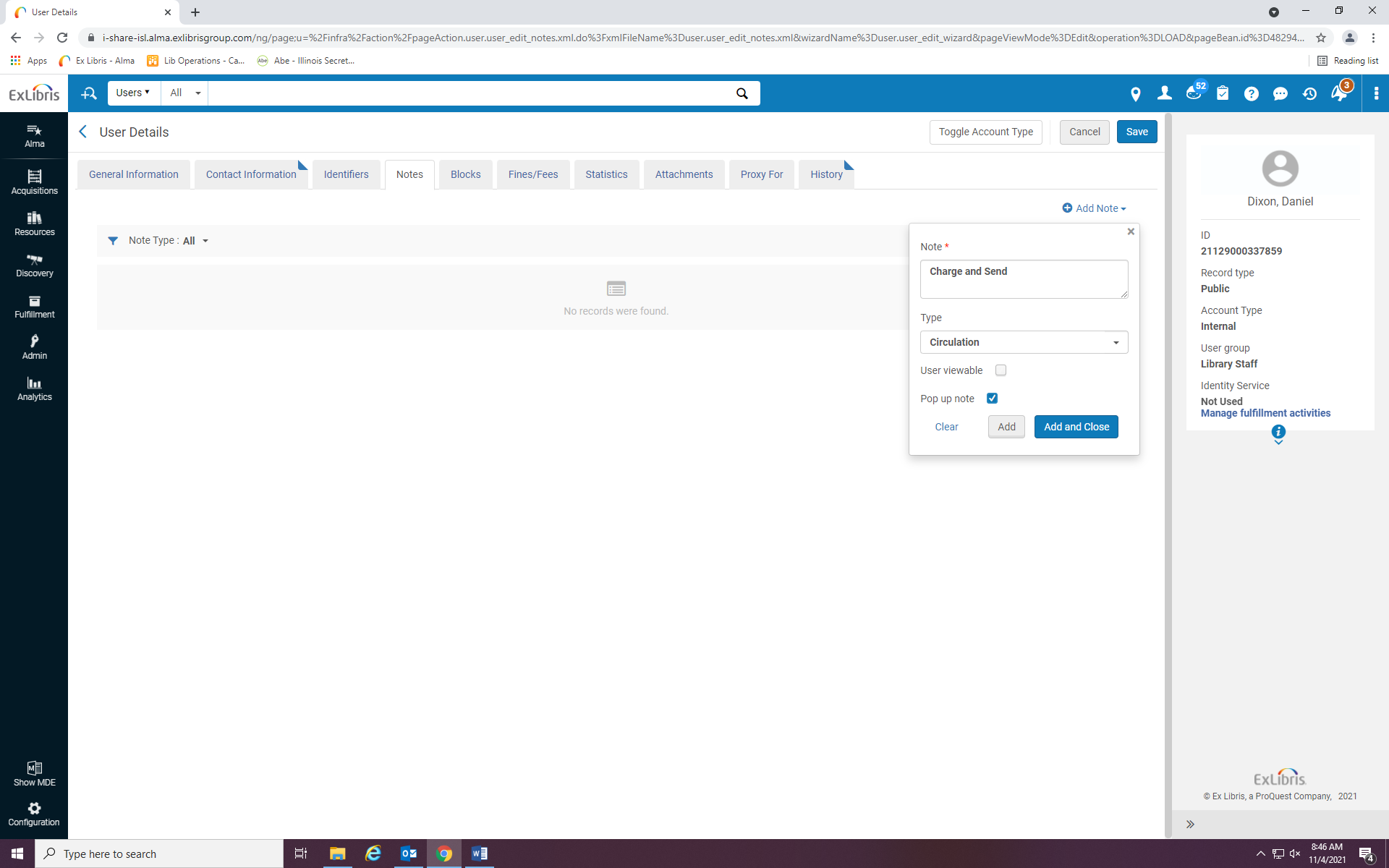
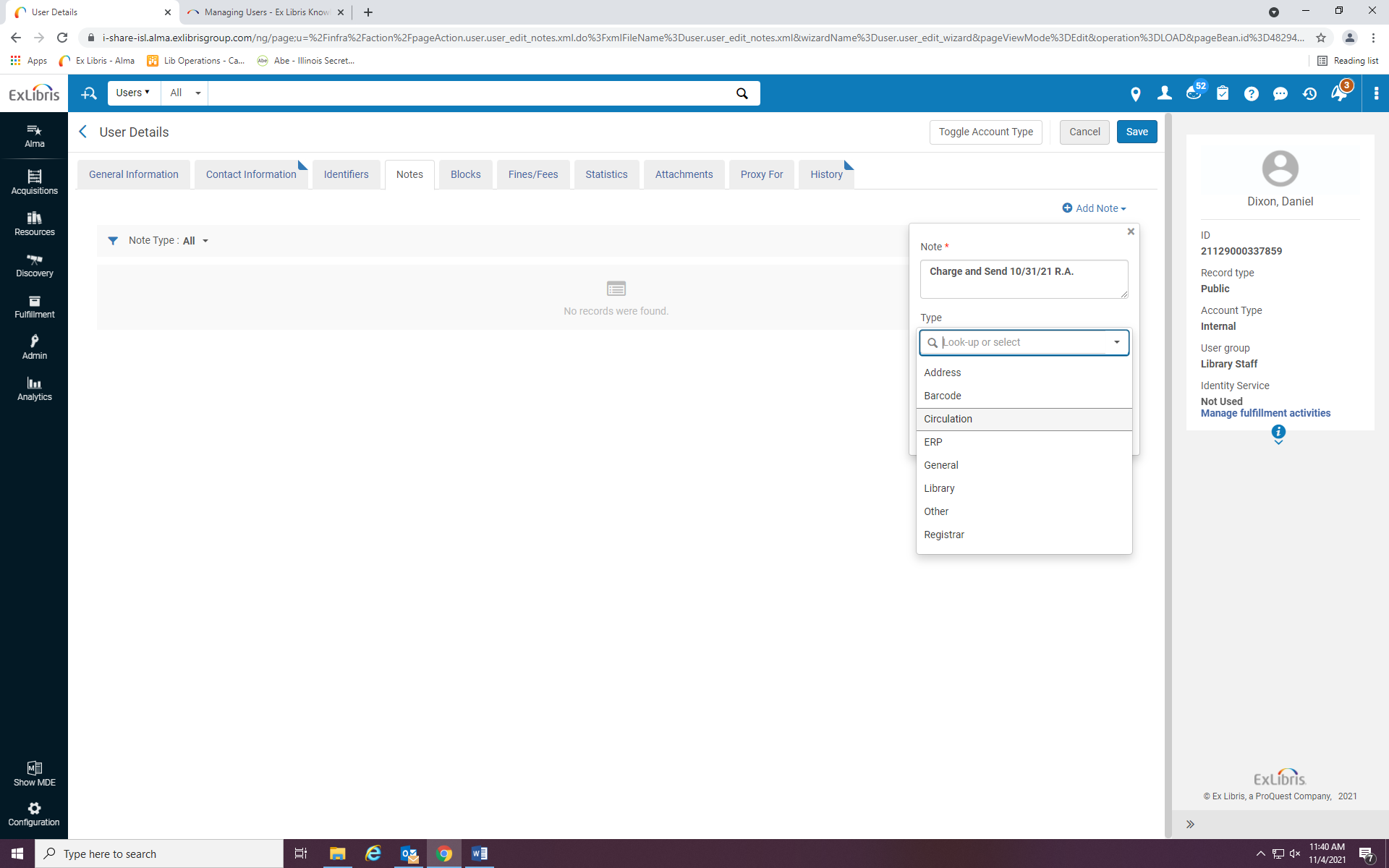
Go to the **Fulfillment tab**, and click on **Manage Patron Services**.



Look up the patron by their name or number.



Click on the **Add Note** link in the **User Notes** box.

Many of the notes you will put on a patron’s record will be **pop-up notes**- such as one stating the patron’s request to have their materials sent to their workplace. Our notes are for staff viewing only, make sure that you **do not** click on the **User Viewable** box. Put the **date** on the note, as well as your **initials**, so we can keep track of when changes are made to accounts, and by whom. Click on **Add and Close**, and then **Save**.

Choose **Circulation** in **Type**, Select the **pop-up note** box so it appears when the patron’s items are scanned, and are sent to the correct place.

