

Notes from CARL Manual

Notes

The Notes tab is used to communicate information about an account to staff who are working on the account. The notes can be system generated (e.g., when they sign up for an ECARD but already have a card in the system); however, most notes have been placed by staff to share information about an account with other staff members (e.g. a payment plan for fines has been set up). The light bulb icon will light up when notes are on the account. Click on the Notes tab to view the notes.

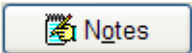
MLS expectation of use

- While these notes are not guest facing, staff must write them as though the guest or a supervisor could see it.
- It is important delete outdated notes. Access staff, librarians and managers may add or delete notes.
- Notes entered by Manager of Access that can only be removed or modified by the Manager of Access will state this in the note.

Utilizing 'See Notes'

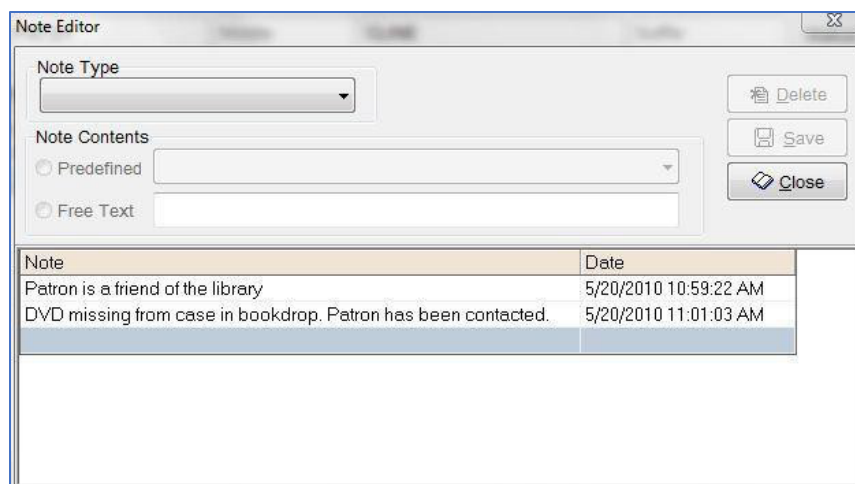
Setting a status of 'See Notes' blocks accounts from using self-checks. Use this when it is ESSENTIAL to draw attention to the notes for an account. Be sure to remove the status and the associated note as soon as possible. If you place an "Urgent" note on the account, it will block the account in CARL.X so staff cannot override the note to check out to the account. If you place an "Urgent" note on the account, you will want to change the status to "See Notes" as well.

How to Add a Note

At the Notes screen, click on the  button and the Notes Editor window will display. Double click on the grid where the notes are displayed to open the Notes Editor window.

Most notes entered by staff are Standard Notes. To change the Note Type, click on the down arrow next to the **Note Type** field.

A best practice for entering notes in CARL is to include your initials and branch.

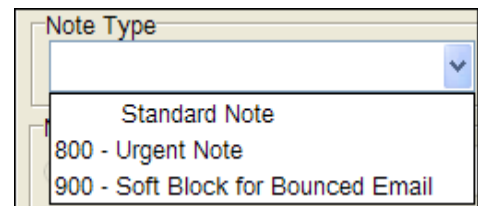


Note	Date
Patron is a friend of the library	5/20/2010 10:59:22 AM
DVD missing from case in bookdrop. Patron has been contacted.	5/20/2010 11:01:03 AM

Standard Note

There are no system or client actions with this note type. This note will display in the Notes tab for informational purposes. For example, noting missing pieces, damaged material, a request to show ID prior to checkout, or Power of Attorney situations.

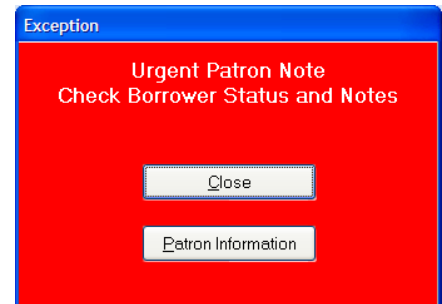
Standard Note will be selected, and the cursor will be placed in the Free Text field to enter the note text.



800 – Urgent Note

An Urgent Note forces client actions. If an Urgent Note is on an account the Urgent Note Big Red Box will be displayed. It will not allow staff to check out until the note is resolved.

Urgent Notes are used to notify staff of accounts with a system ban, a lost/stolen library card, a Lost Item/card held at a library, returned mail, or other urgent matters.



Informational Note

When we want to alert staff to a note on an account, but do not want to use a See Notes status, we can use an Informational Note. The informational note BRB will only populate in Charge / Check Out.

We will use an informational note to identify payment plan details, local suspensions, and when someone other than the account holder is able to pick up holds on an account, and potential quick issues to alert to staff with holds held behind the desk long-term. Additionally, we would use informational notes for:

- consistent issues with material being returned in poor condition and the account holder says the damage was like that,
- identifying accounts consistently over 100 limit where we need to check in previous material before checkout,
- clearly stating we need to do shelf-checks before marking items Claims Never Had,
- noting we should not waive fines.

For local suspensions: The note should read: "security alert: local suspension at [XX branch] for [YY time period] until [end suspension date] – [manager initials]"

Library managers are responsible for removing notes at the end of the local suspension.

900 – Soft Block for Bounced Email


When an email returns as undeliverable, there's an automated process that will change the email status to "bounced". When working with an account, be sure to ask the individual if we have the current email on file as it was returned as undeliverable.

CARL Note Language	Note Type	See Notes Status?
Ask guest for updated phone number	Standard	Yes
Email notice bounced – ask for email address verification	System Generated	Yes

Guest has requested that we check ID before charging material	Standard	Yes
Guest updated address; please ask for ID verification of new address	System Generated	Yes
Item marked as damaged during Check In	System Generated	No
Returned Mail	Urgent	Yes
There is a potential duplicate guest in the file with card number:	System Generated	Yes
URGENT NOTE	Default Selection	No
Free Text – Payment Plan	Informational	No
Free Text – Local Suspension	Informational	No
Free Text – Approval for another guest to pick up holds	Informational	No
Free Text – Local issues where we do not want to prevent guest from using self-checks	Informational	No

Predefined Notes

To add a Predefined note to an account, click on the Predefined radio button and then click on the dropdown list box to select a note from the

list. Click  Save to add the note to the record.

To add a Free Text note, click on the Free Text radio button and enter a note in the adjacent field. Free Text notes can be up to 500 characters long. Any note that is longer than the display in the Patron Information screen will wrap to the next line in the screen.

Include the two-digit library location in the note to assist other staff if there are questions regarding the note. The date is

Note Editor

Note Type
Standard Note

Note Contents
☒ Predefined
☐ Free Text

Date
11/29/2023

Ask guest for updated phone number
Email notice bounced -- Ask for email address verification
Guest has requested that we check ID before charging material
Guest updated address; please ask for ID verification of new address
Item marked as damaged during Check In
Returned Mail
There is a potential duplicate guest in the file with card number:
URGENT NOTE

Note Editor

Note Type
Standard Note

Note Contents
☐ Predefined
☒ Free Text

Lost items(s) or card held at desk -DN

Delete
Save
Close

added automatically and displayed in Patron Information. If a note is modified later, the original timestamp on the note does not change.

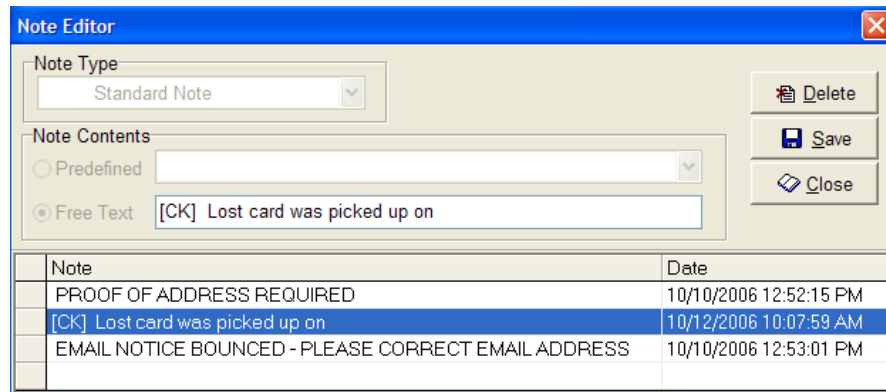
Click  Save to add the note to the record.

To add another note, repeat the above steps. When there are no more notes to be added, click Close.

How to Edit a Free Text Note

At the Notes window, double-click on the grid where the notes are displayed, or click the Notes Editor button.

When the Note Editor window opens, click to highlight the Free Text note to be edited. The text for the note will be displayed in the Free Text window. Click in the Free Text window and modify the note as needed.




Note	Date
PROOF OF ADDRESS REQUIRED	10/10/2006 12:52:15 PM
[CK] Lost card was picked up on	10/12/2006 10:07:59 AM
EMAIL NOTICE BOUNCED - PLEASE CORRECT EMAIL ADDRESS	10/10/2006 12:53:01 PM

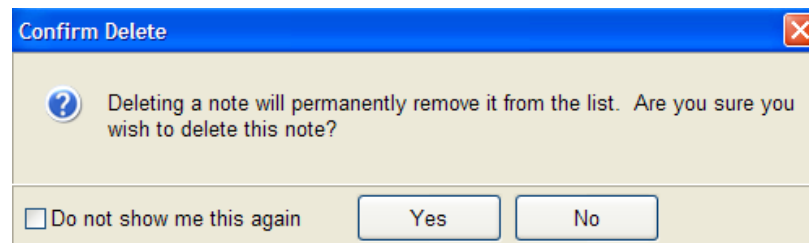
Click  Save when all changes have been made, then click  Close to exit the Notes Editor window.

How to Delete a Note

At the Notes window, double-click on the grid where the notes are displayed, or click the Notes Editor button.

Highlight the note to be deleted, then click the  Delete button.


The system will prompt the user to confirm the note should be deleted.



☐ Do not show me this again

Yes No

If you are deleting multiple notes, check the "Do not show me this again" checkbox. The confirmation will not display for the remainder of the notes being deleted in this session of the Notes Editor.

Click the Yes button and then click  Close to exit the window. Once the Note screen is closed, the note will be deleted.