

Restricted items—using patron alert notes

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Janet's mother asked Miss Zarves to make sure her daughter doesn't check out any movies from the school library that aren't G-rated. But what's the easiest way to keep track of that—especially if multiple parents are asking for different restrictions on what their kids can check out from the library?



Enter: patron alert notes

Patron alert notes pop up during checkout, which allows you to easily monitor any restrictions.

You can add patron alert notes in a few different ways.

In Patrons Management:

1. Go to Patrons Management and use the simple or advanced search to bring up the patron
2. Unlock the record
3. Go to the Notes tab
4. Add the restricted items list to the Alert Notes field
5. Save

From Circulation:

1. Make the patron current in circulation by using the patron barcode, Patron Lookup, or the Homeroom tab
2. Click the actions menu on the Patron pane and select Notes (can also use the + command)
3. Enter the restricted items to the Alert Notes
4. Save



You can also quickly add a patron alert note in Circulation by using the ! command.

You can also create [Item Policies](#), and [set the policy](#) to No Loan Period under the checkout tab to restrict a specific group of items.

If specific students have opted-in to be able to check those out, you could add patron General Notes (the same steps as above except using the General Notes field). That way, when a restricted item is brought into circulation you will get a message that a checkout is not allowed because of the policy, but you can check the General notes to see if you should override the policy and check out the item anyway.

You can read [more about patron notes](#), and as always, you can reach out to our support team with any questions at (800) 347-4942 · support@compa-nioncorp.com.



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