Patron Messages Policy

Background:

Evergreen provides multiple options when adding a message to a patron record:

- A standard **Note** increments the number that displays next to the Notes label. Staff must click the Notes tab to view the note.
- An **Alerting Note** displays in a pop-up screen when the patron record is retrieved and also appears in red in the left sidebar. It also increments the number that displays next to the Notes label.
- An **Alerting Block** prevents the patron from checking out or placing holds on materials. increments the number that displays next to the Notes label.
- The **Depth** allows circ staff to choose whether an alert displays or a block is applied only in the library, in all branches of the library system, or for all NOBLE libraries.
  - A **Local Message** defaults to displaying the note for a specific building. A **Library Message** defaults to displaying the note for all branches in a library system.
- The **Patron Visible** checkbox also sends the note to the patron's message center in their account in the public catalog.

Policy:

In order to maintain consistency in the way these different fields are used across the network, NOBLE libraries are expected to adhere to the following guidelines:

Alerting Notes should be used for messages that circ staff need to know whenever they serve the patron. Examples of alert content include:

- Distinguishing relatives with the same name
- Account use restrictions
- Patron assistance needs.
- Notifications about items left in the library
- Check identification
- Record of attempts to contact patron
- Items returned damaged or incomplete

Standard **Notes** should be used for messages that only need to be consulted in reaction to a specific patron request. An example of a standard **Note** message is:

- Equipment use agreements (can also be a local alert).

Alerting notes that are only relevant to a specific building or to local branches should be set to only appear in those locations. Examples of alerts that should be set to **This library** or **All branches of this library** are:

- Notification about items left in the library.
- Equipment use agreements. (Can also be a note.)

These messages **should not be used** for the following purposes.

- Tracking who can perform actions (picking up holds, checking out materials) on behalf of the patron. Instead, staff should use the "Allow others to use my account" field in the patron record.
- Identifying invalid mailing addresses or email addresses. Instead, staff should use the "Invalidate" option (for email) or remove the check in the "Valid Address?" checkbox (physical address).

All Notes, Alerting Notes and other messages entered into patron records are for the use of the staff of NOBLE libraries and subject to NOBLE's confidentiality practices and procedures. As information entered could become known to the library user, all information should be respectful of library users and be factual, avoiding disparaging language and editorializing. Notes should not contain comments that could infringe on the privacy of the patron, including health issues and gender.

Staff should avoid use of redundant notes, and immediately remove notes that are no longer valid. Patron-visible notes that have been read by the patron cannot be removed, but should be archived.

NOBLE staff may consolidate or remove notes that are redundant or out of date.

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