

How to Add a Pop Up Note to a Patron's Account

A pop-up note is used to alert library staff to important information about a patron when their record is accessed in Alma.

Use a pop-up note when staff need to see time-sensitive or high-importance information before completing circulation actions such as checkout, renewal, or fines processing.

Examples include:

- “Verify photo ID before checkout”
- “Account under review- contact supervisor”
- “Special borrowing permissions apply”

Note:

- Pop-up notes are staff-facing alerts, not enforcement tools.
- They do not block borrowing and do not replace patron blocks.
- Notes should be clear, factual, and professional, as they may be visible to patrons if marked user viewable.

Required Roles

- Fulfillment Operator
- Circulation Desk Manager

1: Locate the Patron Record Navigate to Fulfillment > Checkout/Checkin> Manage Patron Services>. Search for and select the patron’s record

Patron Identification [Go to Return Items](#) [Register New User](#)

☐ Find user in other institution

Scan patrons ID or search for patron

☐ Use proxy

2. Click on the Patron's Name to open the User Details side panel

3. Click on the <Notes> tab

Note: The dog ear on the User Details tab indicates pre-existing information. In this example, the patron already has at least one Note attached to their account. A patron account can include several Notes.

4. Configure the Note Settings

- Select <Add Note>

Note	Type	User viewable	Pop up note	Created By	Creation Date	External Data
1 Must have ID to enter library	General	✓	✓	WRLCadmin	11/11/2025 04:45 PM EST	

- Enter the desired information in the <Note> and use the <Type> drop-down menu to select a locally approved option that will help identify the nature of the note.

< User Details Toggle Account Type Open For Update Cancel Save

Krebeck, Aaron

ID 6624529920004102
Record type Staff

Account Type External
User group wrlc user

Identity Service Not Used
Owner 01WRLC_GML

General Information Contact Information Identifiers **Notes** Blocks Fines/Fees Statistics Attachments Proxy For History

1 - 1 of 1 + Add Note

Note	Type	User viewable	Pop up note	Created By
1 Must have ID to enter library	General	✓	✓	WRLCadmin

Add as an external ☐

Note *

"Hello, The item you requested on XX/XX/XXXX titled "Lorem ipsum dolor sit amet", was not correctly checked out to your My Library account at the time of pick-up. This item will be checked out to your My Library account. If you have any concerns, please contact the XX Circulation Desk at XXXXXX@edu"

Type
Circulation

User viewable ☐

Pop up note ☐

Clear Add Add and Close

- Check <Pop up note> This ensures the note appears when the patron record is accessed
- Optional: Check <User viewable> Only select this if the patron should see the note in Primo VE
 - Most university libraries reserve User viewable pop-up notes for informational messages, not internal staff guidance

+ Add Note

Add as an external ☐

Note *

"Hello, The item you requested on XX/XX/XXXX titled "Lorem ipsum dolor sit amet", was not correctly checked out to your My Library account at the time of pick-up. This item will be checked out to your My Library account. If you have any concerns, please contact the XX Circulation Desk at XXXXXX@edu"

Type
Circulation

User viewable ☒

Pop up note ☒

Clear Add Add and Close

5: Save the Note

- Click <Add and Close>
- Click <Save> on the User Details screen
- The pop-up note is now active.

The screenshot shows the Alma User Details screen. At the top, there are buttons: 'Toggle Account Type', 'Open For Update', 'Cancel', and 'Save'. The 'Save' button is highlighted with a red box and a red arrow pointing to it. Below this, there is a section for 'Created By' with the name 'WRLCadmin'. A 'Pop up note' is displayed, which is a modal dialog box. The dialog has a title 'Note *' and a text area containing a message: "Hello, The item you requested on XX/XX/XXXX titled 'Lorem ipsum dolor sit amet', was not correctly checked out to your My Library account at the time of pick-up. This item will be checked out to your My Library account. If you have any concerns, please contact the XX Circulation Desk at XXXXXX@edu". Below the text area, there is a 'Type' dropdown menu set to 'Circulation'. There are also checkboxes for 'User viewable' and 'Pop up note', both of which are checked. At the bottom of the dialog, there are three buttons: 'Clear', 'Add', and 'Add and Close'. The 'Add and Close' button is highlighted with a red box and a red arrow pointing to it.

6. What Staff Will See

- When the patron's record is accessed in Alma, the pop-up note appears automatically
- Staff must acknowledge the note before continuing

What Does the External Option Mean in a Patron Pop-Up Note?

- When you add a note to a patron record in Alma, the External checkbox controls who the note is intended for, not how Alma enforces it.
- In simple terms: External = the note is meant for people outside your library staff. Most pop-up notes are internal

Frequently Asked Questions

Does a pop-up note stop checkout?

- No. It only alerts staff. Use a patron block to prevent borrowing.

Can multiple pop-up notes exist on one patron record?

- Yes. All active pop-up notes will display.

Can pop-up notes expire automatically?

- No. They must be edited or deleted manually.

Can I edit or remove a pop-up note later?

- Yes. Use the row action menu (...) next to the note and select <Edit> or <Delete>, then <Save>.

Will the note appear in Primo VE within the patron's My Library Account?

- Only if <User viewable> is selected.

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