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”

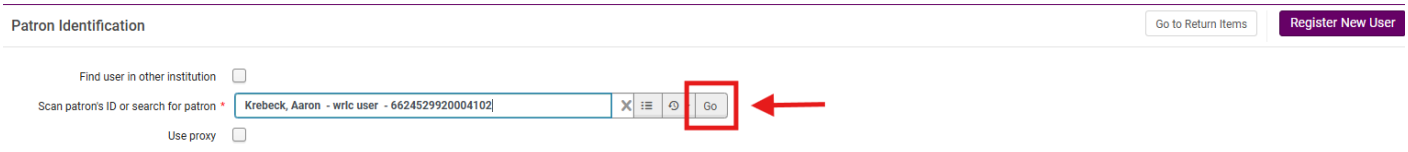
Note:

- 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.

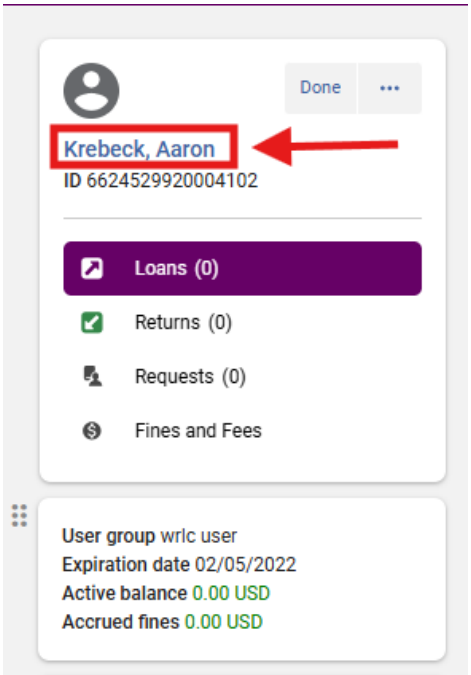
Required Roles

- Fulfillment Operator
- Circulation Desk Manager

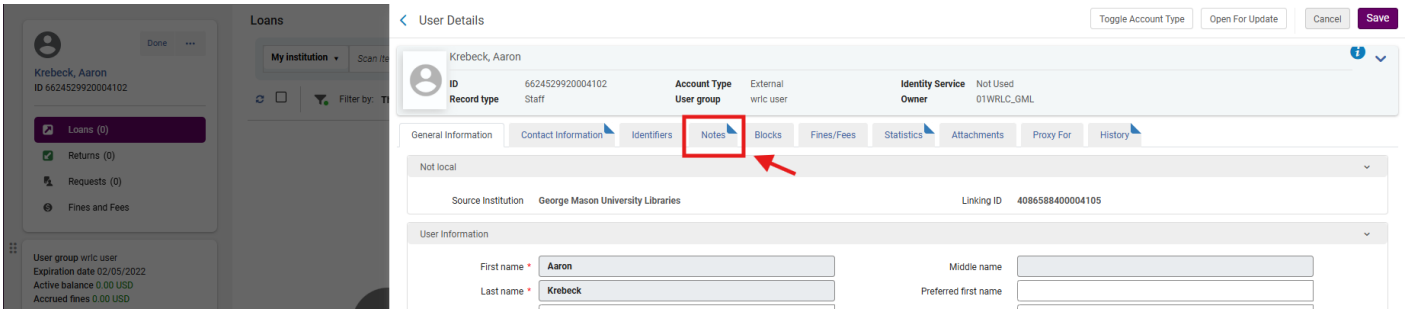
1: Locate the Patron Record Navigate to Fulfillment > Checkout/Checkin> Manage Patron Services>. Search for and select the patron’s record



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



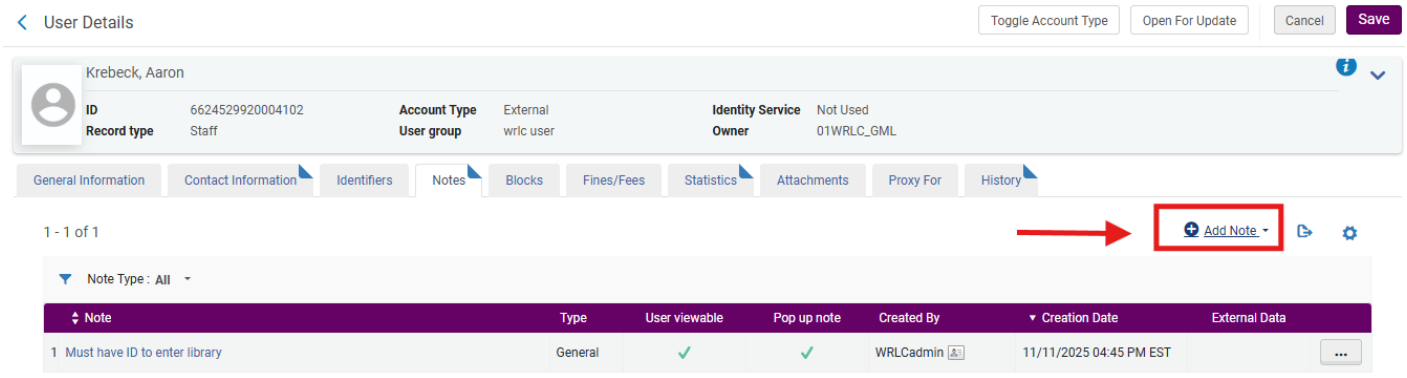
3. Click on the <Notes> tab



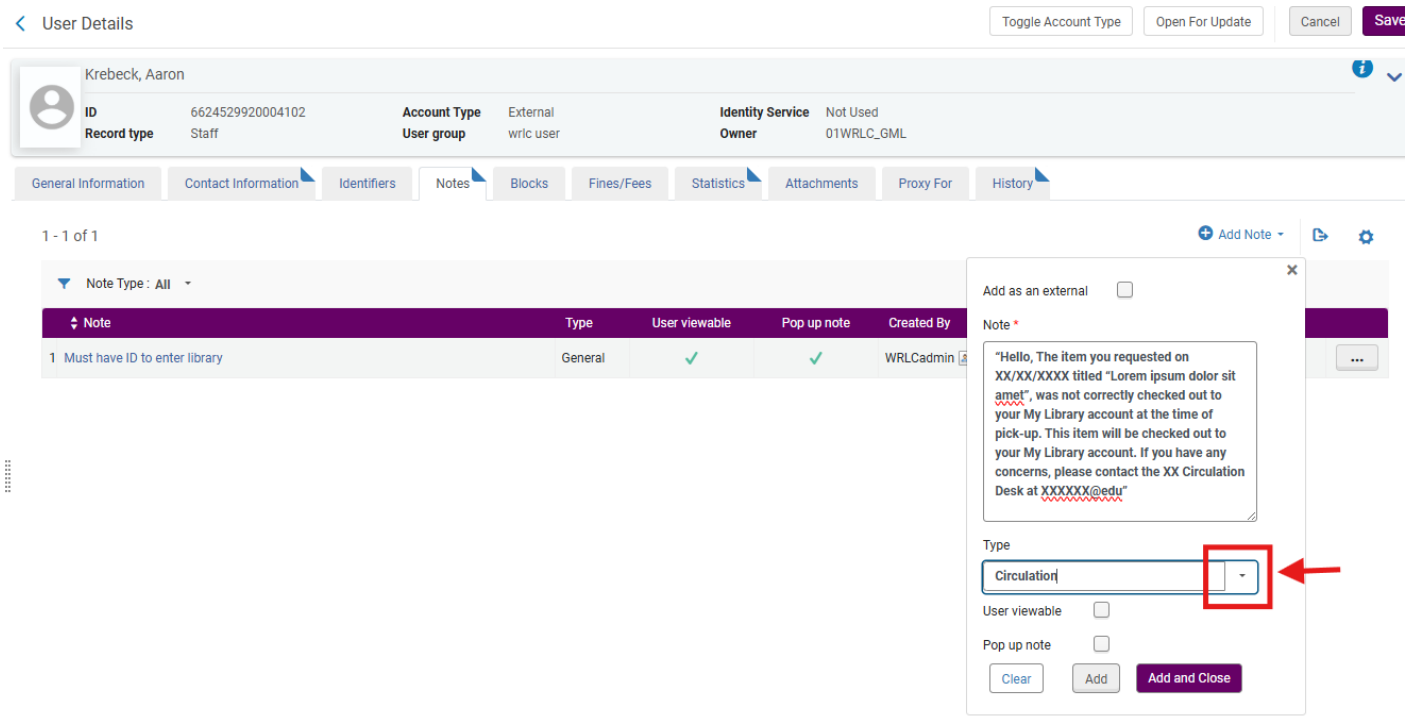
Note: The dog ear on the User Details tab indicates pre-existing information. In this example, the patron already has at least one Note attached to their account. A patron account can include several Notes.

4. Configure the Note Settings

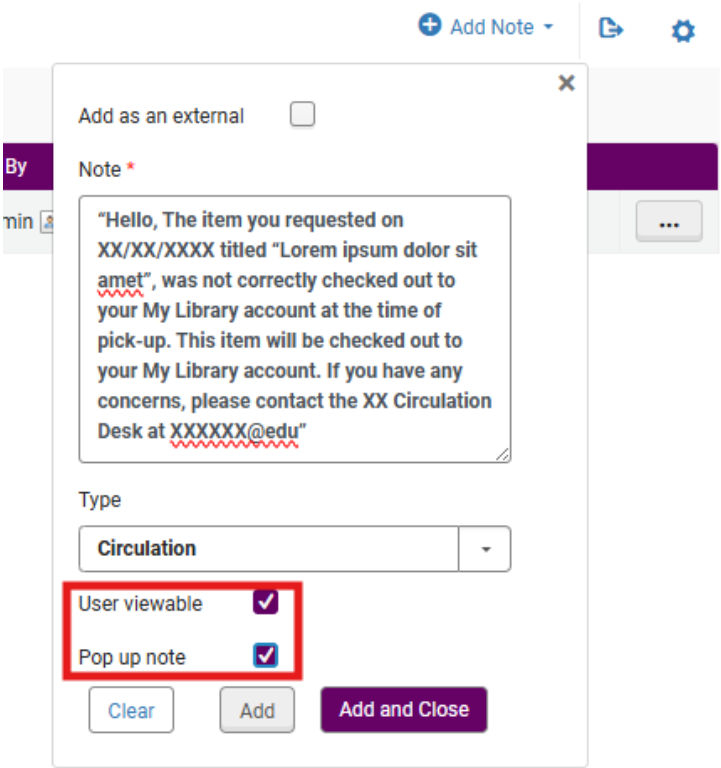
- Select <Add Note>



- 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.

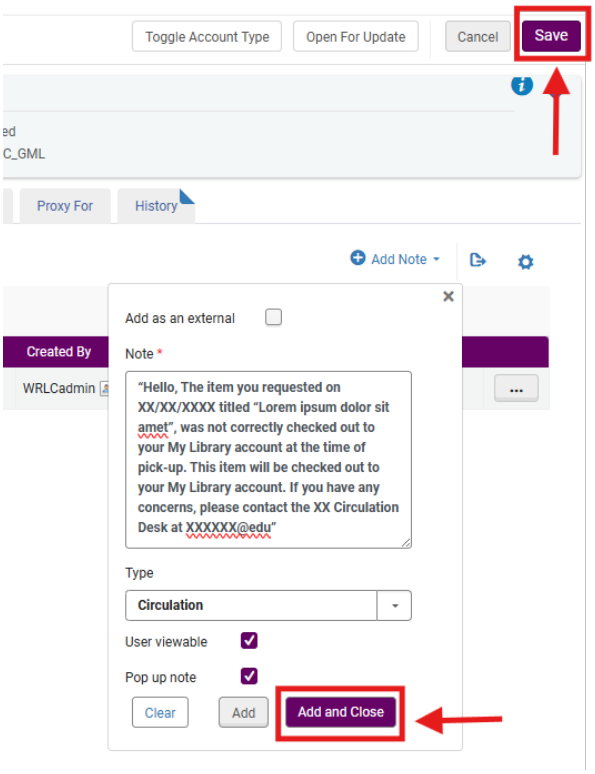


- Check <Pop up note> This ensures the note appears when the patron record is accessed
- Optional: Check <User viewable> Only select this if the patron should see the note in Primo VE
  - Most university libraries reserve User viewable pop-up notes for informational messages, not internal staff guidance



5: Save the Note

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



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.

Revision #1
Created 2026-02-09 16:08:05 UTC by Angelique Carson
Updated 2026-02-09 17:30:32 UTC by Angelique Carson