**STANDARDIZED KLAS COMMENTS**

\*Do not deviate from the approved standardized KLAS comments. Consistency is key to being able to run accurate queries when searching for patron accounts with certain parameters.

All comment subjects must be in ALL CAPS, with no punctuation except “/” in dates. All comment notes must be in ALL CAPS, and initial and date each note.

**Progressive Comments:**

**No date in subject line (except SUSPENDED / REACTIVATED);** multiple entries in notes field arranged in ASCENDING ORDER (most recent note at top); comments not removed.

* **EQUIPMENT NOTES** Include user-provided information about returned players here.
* **LOST BOOKS/LOST EQUIPMENT/LOST BOOKS & EQUIPMENT** Include DOD order number(s) in note, as well as any information about attempts by user to find the book(s). DB-CART xxxxxxxxxx marked lost.
* **6 MONTH NOTICE/OVERDUES NOTICE**
* **RA NOTES** Used for behavioral comments about a user, especially if they are aggressive, ill-tempered, confused, and/or talk in circles. For example: this user has a tendency to threaten staff when they don’t get what they want.
* **SERVICE NOTES** Used to record changes to the way a user is being served, including profile tab changes, preference tab changes, and relevant information from interactions with a user. For example: CHANGED USER FROM AUTOSELECT TO REQUESTS-ONLY.
* **SUSPENDED or REACTIVATED MM/DD/YY** Update the subject line with each new note, and begin each note with “Suspended per…” or “Reactivated per…”

**Incidental Comments:**

**Date required in subject line** (except for ALERT, BIBLE ONLY and enhancements documented with the appropriate comment); usually only one note per comment; comments can be removed following retention period.

* **ALERT** READ THESE COMMENTS IMMEDIATELY. Used for one-off cases of user interaction with special, unique, or unusual circumstances. For example: USER HAS CALLED SEVERAL TIMES WANTING TO BUY A DTBM. HE MAY BE FISHING FOR A SYMPATHETIC STAFF MEMBER. DO NOT GIVE IN. IF HE GETS PUSHY, FORWARD THE CALL TO THE PROGRAM MANAGER.
* **BIBLE ONLY**
* **BLOCKED MM/DD/YY** Used for invalid addresses and equipment issues
* **CALENDAR NOTES** Used to document when suspended users call asking for a LP calendar
* **COA MM/DD/YY** Retain 6 months
* **COA (APT#, STREET #, CITY, ZIP, PHONE) MM/DD/YY** Retain 6 months
* **DECEASED MM/DD/YY**
* **DVDS ONLY**
* **NAME CHANGE MM/DD/YY** Record how the name was changed in the notes. Retain 5 years.
* **NSD MM/DD/YY** (Next Service Date) The date in the subject line should be the date of next service, NOT the date the comment was created. Please include any pertinent information in the comment’s note field. Remove this comment when obsolete or if the user calls to restart service early. If user has magazines, send and email to the Serials Coordinator.
* **TEMP ADDRESS MM/DD/YY** Remove this comment when the user returns to their primary address; DO NOT put in an additional COA comment.

**Registration Support Specialist Comments:**

* **GOES BY ­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_**
* **FOREIGN LANGUAGE**
* **LOW COMP LEVEL**
* **NAME PRONOUNCED “XXXXXXXXXXX”**
* **NO [CAL, TBN]**
* **OTMC STUDENT**
* **PATRON IS FEMALE/MALE/NON-BINARY**
* **TRANSFER FROM** **XXXX** (NLS library code; i.e. WA1A)

**Service Coordinator Comments:**

* **BARD/BARD ONLY** Use this comment to record BARD specific things like reset password, trouble logging in, changed email address, etc.
* **BARDi** Used to list which staff members of an organization have BARD accounts.
* **SBARD/SBARDi** Used for an inactive BARD account.
* **EREADER**
* **INACTIVE 1, 2, 3, etc**
* **MAGAZINES**
* **MAGAZINES ONLY**
* **NEWSLINE**
* **NEWSLINE SUSPENDED**
* **SERIALS NOTES**
* **UTAH BRAILLE #**\_\_\_\_\_\_\_ (**INACTIVE / SUSPENDED / IN-HOUSE/EREADER)**

**WHEN TO SUBMIT A COGNITO UPDATE FORM**

1. When you change something on the **Main** tab
2. When you change something on the **Contact** tab
3. When a magazine needs to be added to or removed from the **Subscriptions** tab
4. When there is an invalid address resulting in a block on the **Blocks** tab
5. When a user needs to be **reactivated**, **transferred in** or **transferred out**

(RA submits Update form, but does not change the status in KLAS)

1. When a user is switched from **DOD to BARD Only** or **BARD Only to DOD**

The first 4 items require a corresponding comment.  Item 5 comments are added after the reactivation/transfer is complete. Item 6 is for the BARD Coordinator so she can review the change and make sure the **Profile** tab has been set correctly.

Once the Update form is submitted it is reviewed by the Registration Support Specialist to ensure that the changes have been completed and documented.  The Update form is then reviewed by the Fund Development Assistant to make the necessary changes in our electronic files and the GiveSmart fund development database.