

Important Things about Holds

Revision Date: July 2017

1. By default, no holds are allowed between school/academic libraries and public libraries. Libraries can choose to allow holds from all types of libraries.
2. Use the Discharge wizard on all items received via delivery whether the items are to fill a hold or for shelving.
3. All holds must be charged out to a patron to complete the hold cycle. If the patron no longer needs the item, remove the hold from the patron's account and discharge the item.
4. If you do not lend an item type, then you cannot request that item type for your patrons. If a patron request the item type your library does not loan via the OPAC and it comes to your library, contact the patron and inform them of your library policy, remove the hold, discharge the item and send the item back to owning library or on to the next requesting library. (RSA Reciprocity Policy: <http://alsrsa.org/client/search/asset/3682>)
5. There must be a barcode and the owning library name on all items sent to fill holds.
6. If you have multiple copies of title on pick list, do not send a copy with a different item ID. It may not be from the same bibliographic record and will not fill the hold.
7. If the borrowing library's renewal limit has been met and a patron would like to renew an item, contact the owning library for permission to renew the item before overriding the renewal limit and renewing the item for the patron. (RSA Renewal Policy: <http://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/3002>)
8. Do not delete holds on your items from patrons at another library. If only your library owns an item, you must call the patron's home library and ask them to remove the hold. If other libraries own the item, refer to the "When Items are unavailable to fill a hold or pick list request" document. <https://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/501>
9. Do not include date due slips when transiting items.
10. When filling out delivery labels, do not use the WorkFlows library name code. Completely spell out the library's name. The wrong name on a delivery label slows items from reaching patrons.

11. RSA member libraries cannot place holds for non-Resource Sharing Alliance NFP member libraries. i.e. A RSA member public library cannot place a hold for the local non-RSA member school library.
12. If the Place Hold wizard is used when placing book club and research holds, be sure to change the expiration date to a date before the book club meeting or project is due. Do not leave the expiration date at the default.
13. Library staff members are to check out items borrowed from other libraries for the same circulation loan period as their library patrons. Use the Special Due Date helper to adjust the loan period. <http://alsrsa.org/client/search/asset/3725>
14. WorkFlows will prevent a requesting library, using the no on shelf holds option, from placing a hold on a title if the requesting library owns a copy that is currently on the shelf.
15. The clean hold shelf report contains holds to be cleared from the holds shelf. The report list items that have expired on the hold shelf or items when patrons have removed or suspended a hold. The clean hold shelf report will only be in a library's RSA created Gmail account if there are items to be cleared. Discharge all items that are on the clean shelf report and follow any instructions in WorkFlows.
16. If a hold is removed after the item has been received, the item appears to be on the owning library's shelf in WorkFlows. After the hold is removed, the item must be discharged.
17. Items discharged might not go back to the owning library. If the item has multiple holds the item will be transited to the next requesting library.
18. RSA has created D1500 numbers for libraries to use when charging out items requested by RSA Union List members and non-RSA member libraries via fax or OCLC. Please search for these D1500 numbers carefully. Contact RSA (rsahelp@railslibraries.info) if you cannot find a D1500 number for a library.
19. Libraries with branches should use the patron's branch library as the pickup library. Do not create a user with the Branch's name for holds.
20. A library's copy of a title will fill their patron's holds before being placed in transit to another library. If your title is out at a borrowing library and one of your patrons places a hold the title will come back to your library when it is discharged if the hold has not been filled.
21. If the Holds Block Override box pops up when charging an item out to a patron, override the popup box and charge the item out to your patron. Your patron has priority over your items. (Hold Block Override Popup Box: <https://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/498>)
22. If the Discharge Item Intransit box (<https://alsi.sdp.sirsi.net/client/search/asset/3323>) pops up during discharge WorkFlows considers the item on its way to the requesting library

and will stop trying to find an item to fill the hold. Closing the Discharge item transit popup box does not remove the item from transit. The item must be put in delivery or use the directions in the “When Items are unavailable to fill a hold or pick list request” <https://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/501> document if you cannot send the item.

23. Reciprocal patrons using another pick up library will go to the bottom of the hold queue on the item owned by the pickup library. The pickup library’s patrons will always take precedence.

24. Reciprocal patrons using another pick up library will get the item from their home library, not the pickup library, if the item is on the shelf at their home library.

25. If a reciprocal patron’s home library owns a copy of an item, the hold will be placed in order in the queue on their home libraries copy of the item regardless of the pickup library. The item may come from the patron’s home library to fill a hold.

26. Your Local Hold only item may go intransit to another library if the hold is for your patron and your patron selected a different pickup library.

Questions ?? Contact the RSA help desk at rsahelp@railslibraries.info or RSA staff at 866-940-4083.