When Items are Unavailable to Fill Hold or Picklist Request

Revision Date: July 2017

<u>Under no circumstance delete a hold on your item for a patron from another library</u>

1. If a hold pops up for a patron from another library when checking out an item to one of your patrons, override the hold and charge the item out to your patron. **Do not override and cancel the hold**.
    a. On the Holds Blocks Override box:
        i. Type RSA in Hold block override box
        ii. Click on the Override & Checkout Item button
        iii. **Do not click on the Override Checkout Item & Cancel Hold button!**

2. If you get a hold request from the picklist or the Onshelf Items wizard and you cannot find the item, use the Mark Item Missing wizard in the Item group or the Mark Item Missing button on the bottom of the Onshelf Items wizard. Marking the item missing alerts WorkFlows that your item cannot fill the hold and WorkFlows will place the item on another library's picklist. **Do not change the home location to MISSING using the Call Number and Item Maintenance wizard.**

3. If you get a hold request on either the picklist or the Onshelf Item wizard or a hold request when discharging an item and you do not want to send the hold, you can charge the item to a No Transit user.
    a. To create the No Transit user:
        i. Open the User Registration wizard
            1. Select a new patron ID number and enter as the user ID
            2. Select the profile name NO-TRANSIT from the "Profile name" drop down menu
        ii. Basic tab:
            1. Enter either the first two letters of your WorkFlows library name or your library name and NO-TRANSIT in the "Last Name" box. (Example: AG NO-TRANSIT)
        iii. Privilege tab:
            1. Use the gadget button after the "Privilege expires" box to select the "No date" radio button on the top of the calendar popup box.
            2. Click "OK" at the bottom of the Gadget: calendar popup box. The "Privilege expires" box will contain NEVER.
            3. Type RSA in the "Override" box to the right of the Pin box. .
        iv. Click the "Check Duplicate User" button on the bottom of the User Registration screen.
        v. Click the "Save" button on the bottom of the User Registration screen to save the user.

Then charge the item out to this user. The item will need to stay on the No Transit user record for several days. The item can be placed on your shelves while charged out to the No Transit user. While checking this item out to a patron if a hold pops for a patron from another library, override the hold and charge out the item to your patron. (Follow the directions in step 1) **Do not click on the Override Checkout Item and Cancel Hold button.**

4. If your item is the only item on the bibliographic record, the above steps will not remove the hold from your item. Contact the patron's home library to inform them you cannot supply the item. The home library will remove the hold and try to find the item for their patron from another source.

Item types limit holds.   Let the RSA System Supervisor or System Coordinator know if you have an item type that you do not want to allow holds or allow local holds only. (rsahelp@railslibraries.info or 866.940.4083) Remember: If your library does not lend an item type, you cannot request items with that item type for your patrons. (See the RSA Reciprocity Policy: http://alsrsa.org/client/search/asset/3682).

Your item will fill your patron's hold request in the order it was created regardless of the pickup library. If your patron placed the hold using a different library as the pickup library, your item will be put intransit to fill that hold when the queue gets to your patron's request.

RSA staff spends a lot of time trying to track down why holds disappear for libraries only to find out the hold was removed by another library. Please be considerate of patrons from other libraries. If a hold needs to be removed for some reason, contact the patron's home library. They will remove the hold and try to get the item from another source.

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