



How Holds Work Guide

Last updated: February 19, 2025

Important Terminology

Local Hold: A hold placed on an item on your shelf by your patron.

System Hold: A hold placed on any item on one bib record.

Interlibrary loan: A request for an item by a patron or library outside RSA. For more information on this process, please see the [Items Requested by a Non-RSA Library Procedure](#).

Copy Level Hold: A hold that is placed on one specific item and no other item will fill it.

Title Level Hold: A hold that is placed on any item on a Bib Record of the item selected for the hold, not a specific Item ID.

Reciprocity: If you do not lend an item type, then you cannot request that item type for your patrons. RSA recommends that member libraries share all circulating item types. See [RSA Reciprocity Policy](#).

Holds rely on several parameters to work. For a hold to be successfully placed, all the rules must allow the hold. Here is a quick overview of what the system is looking for to allow a hold.

- Title level holds look at all items on the BIB RECORD of the item ID provided when the hold was placed, not at the specific item ID used. Any holdable item on that bib record can fulfill the hold. WorkFlows defaults to Title Level Holds.
- Copy level holds look ONLY at the item ID given when placing the hold. NO OTHER COPY OF THE TITLE CAN FILL THE HOLD even if multiple other copies are available. This is why it is important to pull the item ID found on the picklist and not just the same title.

Steps WorkFlows uses when a hold is placed:

1. Can the patron check out the item in their library or the hold pickup library (if

different from their home library)?

- a. 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.
 - Your Local Hold only item may go in transit to another library if the hold is for your patron and your patron selected a different pickup library.
 - b. If the circ rules for the checkout library (user library or pickup library) would allow the patron to check the item out, the system continues to look at the hold. If not, the hold fails at this point.
 - c. At this point, it is a simple decision based on item type and user type. If your JUV cards are blocked from checking out item type DVD, then all DVD item type holds would be blocked.
 - d. Since not all libraries use the same item types for each item, by default, all item types are allowed to be checked out by all user profiles in all libraries. If this were not allowed, your patrons would only be allowed to check out the item types used in your library. If you used item type BOOK for all book items, not allowing all item types would mean no holds on BOOK-PBK, BOOK-LPRNT, etc.
 - e. Item checkout limits also affect the number of holds a patron can have filled. If a patron is limited to 5 DVD checkouts, then the system will not transit an item to fill a DVD hold unless the patron has an available checkout (4 or less DVDs checked out).
2. Can the patron check out the item from any of the libraries on the selected bib record (if title level hold) or the selected library for copy level holds?
- a. By default, school/academic libraries can borrow from other school/academic libraries and public libraries can borrow from other public libraries. By default, there are no holds allowed between school/academics and public libraries.
 - b. Allowing all libraries to borrow your materials does not allow your patrons to borrow from all other libraries. The rules are based on each library's wishes.
 - c. The RSA Website (on the [Membership List page](#)) has a complete and up-to-date listing of each RSA member library's holds group; Public, School/Academic, or All.
 - d. "Hold Not Allowed" cannot be overridden. These hold groups are the master gatekeepers for who borrows from whom. Please consider allowing holds to all libraries if you can. The more libraries that allow anybody to hold their items the better.
3. Are any of the remaining items being considered blocked by the holds map?
- a. The final act of the holds process is running through the hold map.
 - b. The hold map works by library, item type, and user profile. It is a blocking map meaning that all items can be held by default but can be blocked specifically.

- c. The most blocked item types are the NEW item types (N-BK, N-DVD, etc.).
- d. Some libraries only allow local holds for certain items like new items, kits, equipment like hotspots, and Library of Things. Holds on these items can only be placed by patrons of the item-owning library. The patron can choose a different pickup library. If they do, and you don't transit those items, then the item-owning library needs to contact the patron.
- e. The RSA Support Site Holds Parameters page has a current listing of the hold map. You can use it to see what libraries are blocking individual item types. <https://support.librariesofrsa.org/project/holds-parameters/>

At this point the system has looked at the patron to see if they can check out the item (not blocked or barred and can legally check out the item), then looked to see if the item (copy level) or items (title level) were available to be held and removed all items in libraries not in the patron's holds group. Then the system filters one last time by the holds map and selects an item to fill the hold from the remaining eligible items.

4. Once the hold is placed, it will appear on the selected library's picklist after the next run of the pick list. The hold will remain on that picklist until the library pulls the item and traps the hold or checks the item out to another patron or marks the item as lost or missing. However, if another library checks in an item on the same bib record as that hold, the system will try to grab and transit that item to fill the hold quicker. The item would then be removed from the next run of the pick list.
 - a. If an item-owning library is closed the day the pick list runs, it will select an item from an open library. This is one reason why your library's on-shelf item would not be selected to fill the hold.
 - b. See [Why didn't my patron's hold get filled by my item? A Guide](#)

Questions? Contact the RSA Help Desk at help@rsanfp.org or at 866-940-4083.



Placing Holds Guide

Last updated March 3, 2025

There is a video to accompany this Guide:

<https://www.youtube.com/watch?v=2NH5iPzhUvg>.

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Related documents

[How Holds Work Guide](#)

Processing Holds Guide [link to come]

[RSA Reciprocity Policy](#)

[Printed Documents Including Patron PII](#)

[Why didn't my item fill my patron's hold? A Guide](#)

Notes:

- RSA member libraries cannot place a system-wide hold for non-RSA member libraries. i.e., an RSA member public library cannot place a hold for the local non-RSA school library.
- Do not delete a hold without the patron's permission or without informing the patron's home library.

Important Terminology

Title Level Hold: Any holdable item on a bib record can fill the hold.

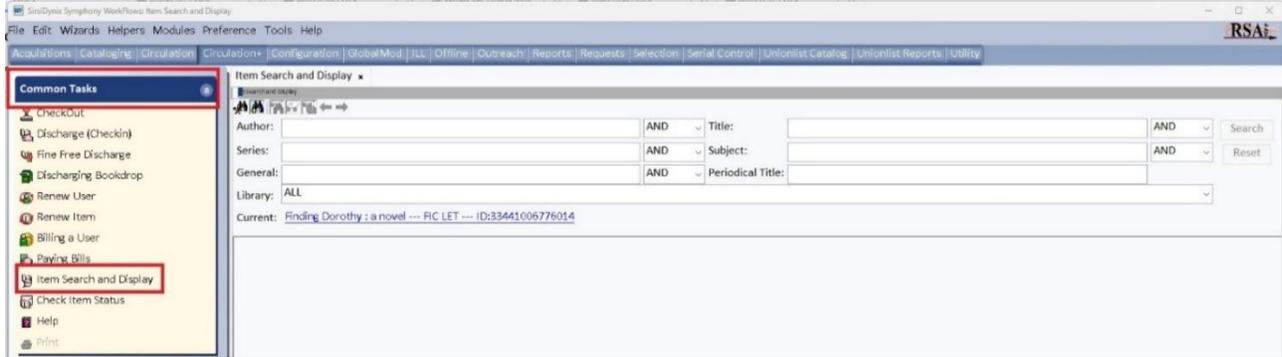
Copy Level Hold: Only the selected Item ID will fill the hold.

System-wide hold: A hold on all holdable items from any library can fill the hold

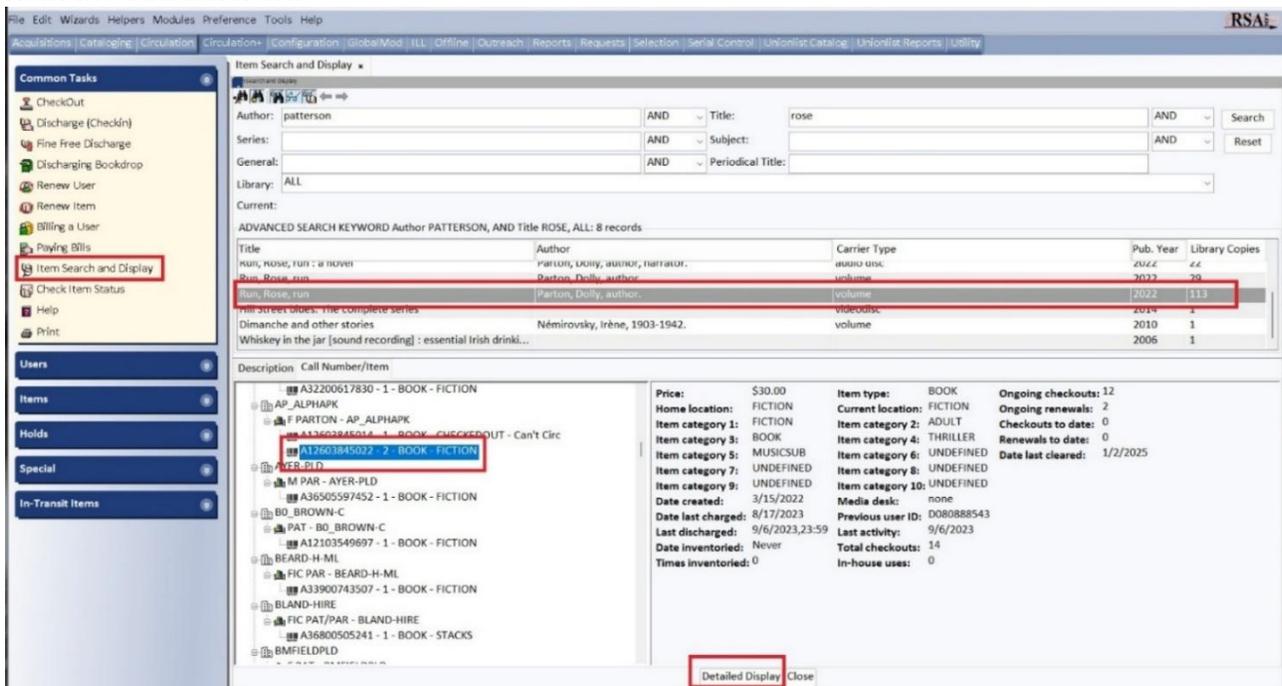
Search for the Item

Placing a hold starts with searching for the item requested.

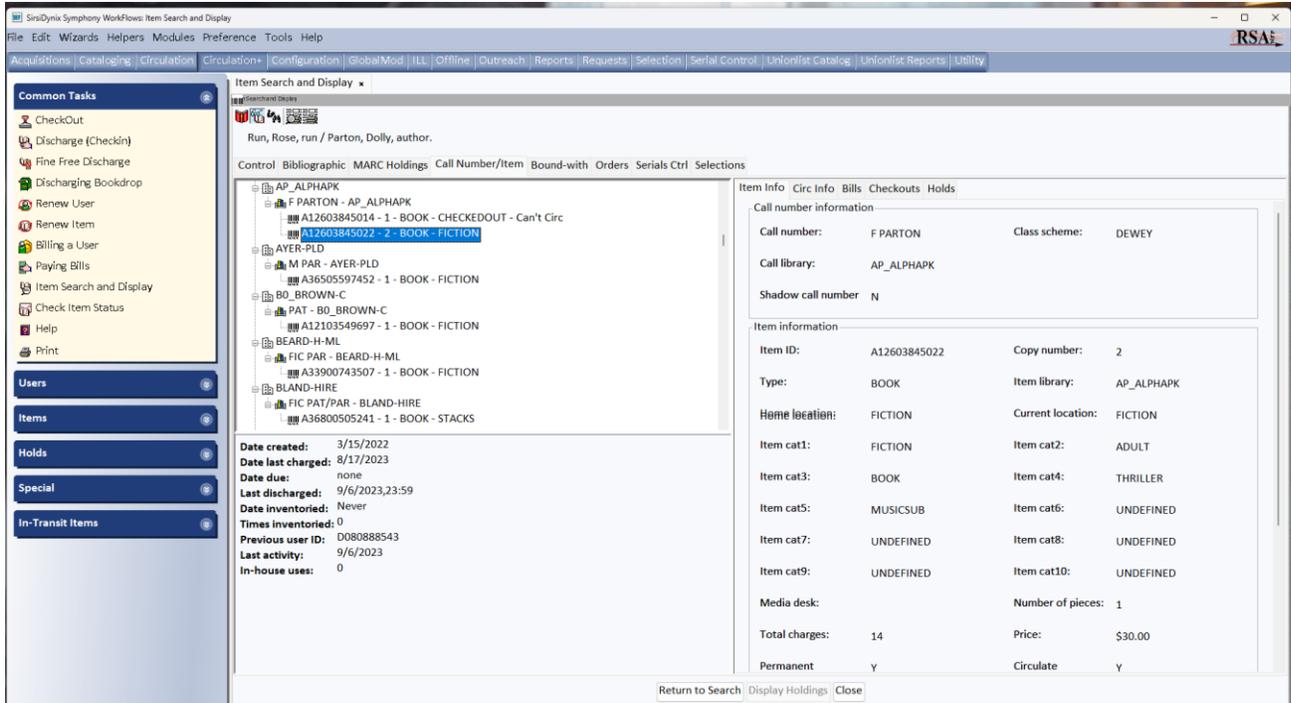
Use Circulation+>Common Tasks>Item Search and Display to search for the item requested by the patron. If the search defaults to your library and you don't have the item, or need a different format, change the search library to ALL. See **Item Search and Display Guide [link]** for details on searching in Workflows.



Once the item is found in Item Search and Display **choose Detailed Display** to make the item the current item.

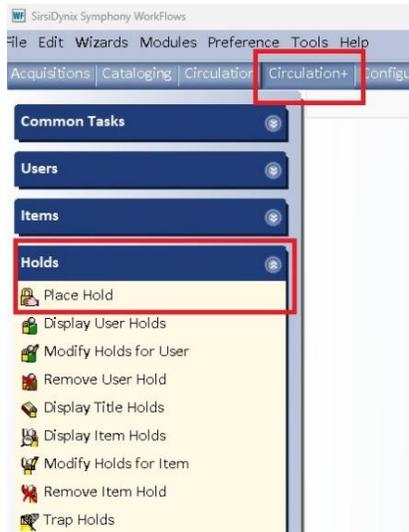


Detailed Display shows all items on the title record under the Call Number/Item tab, including details about each item. **The item is now the “current item.”**



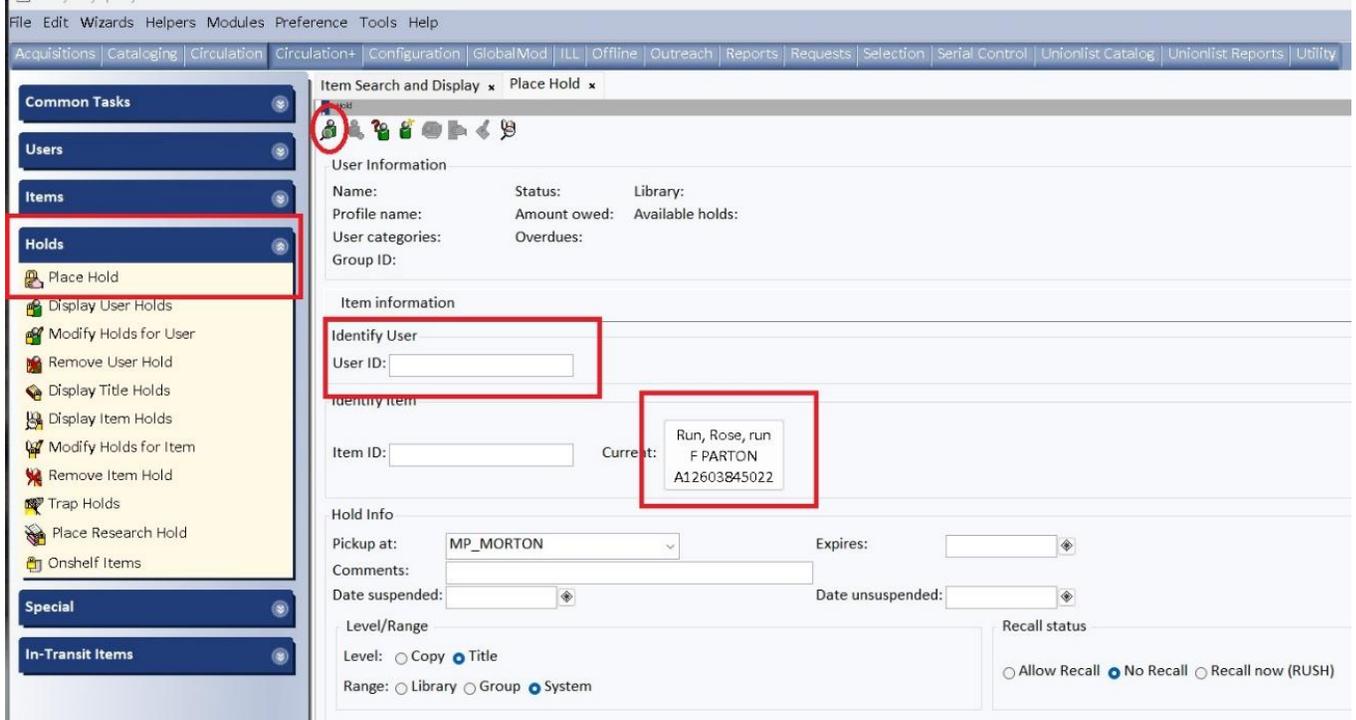
Place Hold

- In Circulation+>Holds Group choose Place Hold

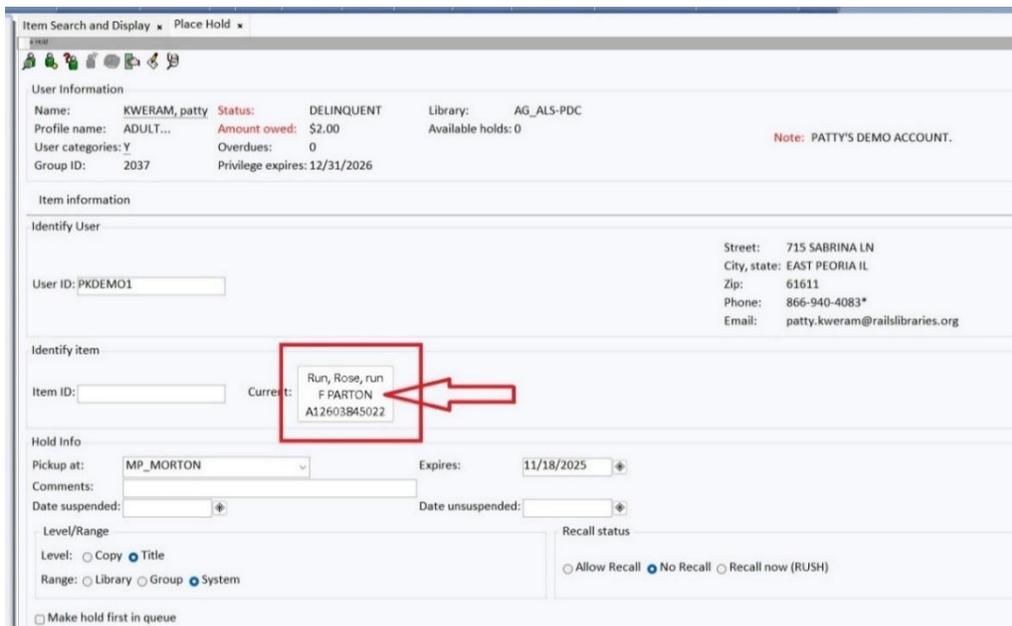


- Scan the User Id or use the User Search helper  to search for the user. If using the helper, verify that it's the correct patron.

Resource Sharing Alliance



Note that the item that was just searched is the Current item. Click on the current item to enter it in the Item ID box. This item is a placeholder for any holdable item on the record when placing a Title Hold. This is not necessarily the item that will fill the hold.



Verify the information

Confirm the patron's contact information. If they have an email, they will get an email when the hold is available. If there is no email, they will need a phone call. Confirm the pickup library, which defaults to your library or their home library, depending on settings.

Item Search and Display x Place Hold x

User Information
Name: KWERAM, patty Status: DELINQUENT Library: AG_ALS-PDC
Profile name: ADULT... Amount owed: \$2.00 Available holds: 0
User categories: Y Overdues: 0 Note: PATTY'S DEMO ACCOUNT.
Group ID: 2037 Privilege expires: 12/31/2026

Run, Rose, run / Parton, Dolly, author.
FIC PAR Copy:1 ID:A36701143774

Identify User
User ID: PKDEMO1
Street: 715 SABRINA LN
City, state: EAST PEORIA IL
Zip: 61611
Phone: 866-940-4083*
Email: patty.kweram@railibraries.org

Identify item
Item ID: A36701143774

Hold Info
Pickup at: MP_MORTON Expires: 11/18/2025
Comments:
Date suspended: Date unsuspended:
Level/Range
Level: Copy Title
Range: Library Group System
Recall status
 Allow Recall No Recall Recall now (RUSH)
 Make hold first in queue

Get User Information Get Item Information (I) Place Hold Place Hold for Another User Close

Expires: 11/18/2025

This is the date that the hold request will drop out of Workflows if the hold is never filled, usually 300 days from the date the hold is placed. No need to change this date.

Comments: place at drive up window
Date suspended: 01/28/2025 Date unsuspended: 02/02/2025

Optionally, you may enter a comment and/or suspension dates (so they won't lose their place on the hold list should it be ready when they aren't able to pick up the hold). You can suspend a hold in Workflows after it has been placed, or the patron can suspend the hold in RSACat.

Level/Range Level: <input type="radio"/> Copy <input checked="" type="radio"/> Title Range: <input type="radio"/> Library <input type="radio"/> Group <input checked="" type="radio"/> System	Recall status <input type="radio"/> Allow Recall <input checked="" type="radio"/> No Recall <input type="radio"/> Recall now (RUSH)
<input type="checkbox"/> Make hold first in queue	

The above defaults should only be changed under special circumstances.

Level:

A TITLE LEVEL HOLD means that any holdable item on the record can fill the hold. The Item ID is only a placeholder for any item on that record.

A COPY LEVEL HOLD means that only the item ID selected will fill that hold. Use for circumstances like placing a hold on your library's item that needs attention, like repair or relabeling.

Range:

A SYSTEM LEVEL HOLD means any holdable item. A GROUP LEVEL HOLD may be used to choose items from only your library plus your library branches to fill the hold.

Once you have verified the information, select PLACE HOLD.

The screenshot shows a library system interface for creating a hold. At the top, the 'Item ID' is A12603845022. Below this is the 'Hold Info' section with fields for 'Pickup at' (MP_MORTON), 'Expires' (11/18/2025), 'Comments' (place at drive-up window), 'Date suspended' (1/28/2025), and 'Date unsuspended' (2/2/2025). The 'Level/Range' section is identical to the one in the previous image, with 'Title' selected for level and 'System' for range. The 'Recall status' section is also identical. At the bottom, there is a row of buttons: 'Get User Information', 'Get Item Information (b)', 'Place Hold' (highlighted with a red box), 'Place Hold for Another User', and 'Close'.

If the hold is successful, you will get this message:



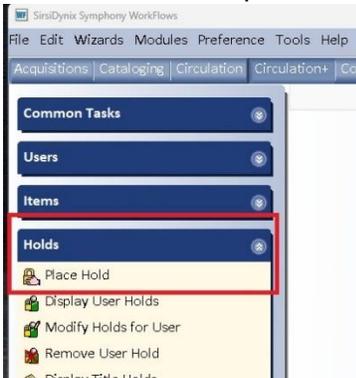
If the hold is not allowed, you will get this message:



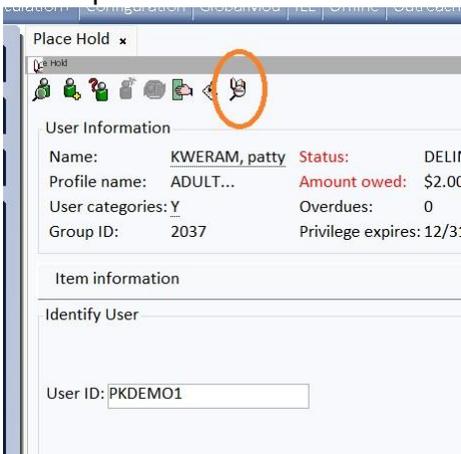
The standard override will not work. You can look for the item on another record to place the hold. Or you can call the owning library to see if they are willing to send the item for your patron. The owning library may be able to place the hold in Workflows, depending on their hold rules.

Alternate way to place holds

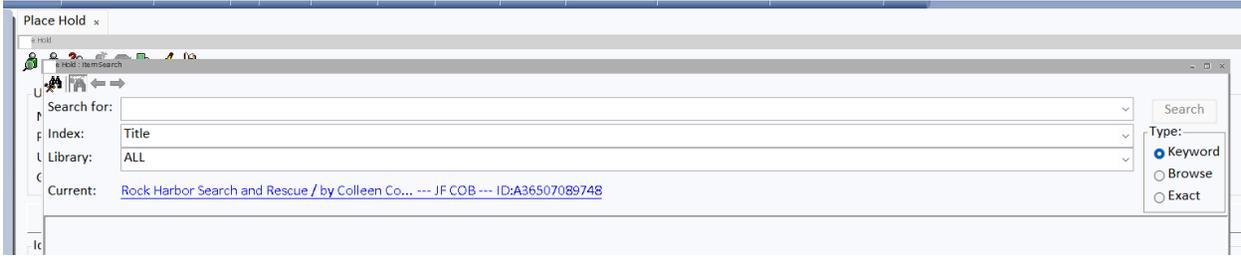
In the Holds Group, Choose Place Hold.



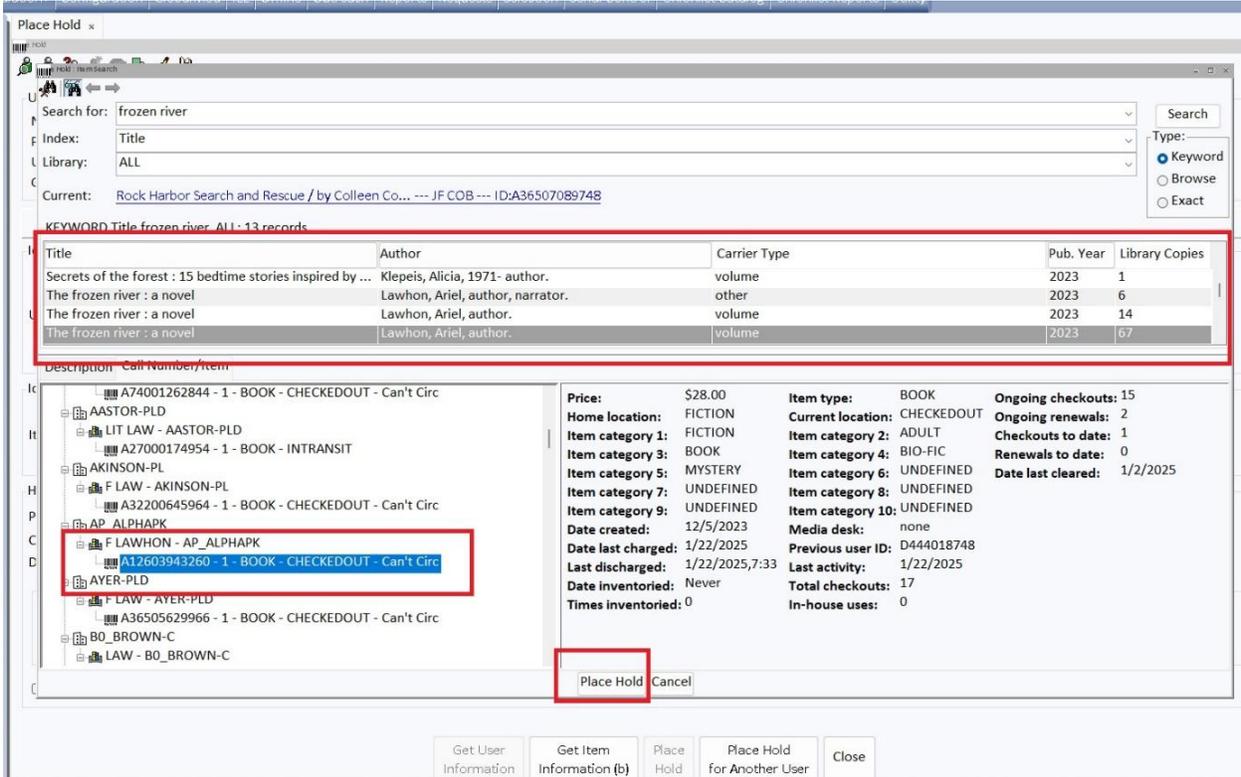
Scan or enter patron information in User ID. Use the Item Search helper  to search for the requested item.



This will open an Item Search box. Search for the item requested. See **Item Search and Display Guide** for details.



Select the item and choose Place Hold. The hold isn't completed yet!



Remember that any holdable item on that record may fill a system-wide hold. Verify patron and pickup information. Then choose Place Hold.

Place Hold

User Information
Name: KWERAM, patty Status: DELINQUENT Library: AG_ALS-POC
Profile name: ADULT... Amount owed: \$2.00 Available holds: 0
User categories: Y Overdues: 0 Note: PATTY'S DEMO ACCOUNT.
Group ID: 2037 Privilege expires: 12/31/2026

The frozen river : a novel / Lawhon, Ariel, author.
F.LAWHON Copy3 ID:A12603941260

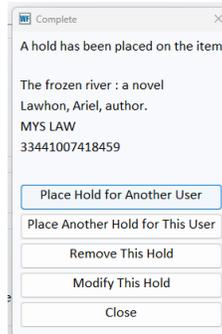
Identify User
User ID: PKDEMO1 Street: 715 SABRINA LN
City, state: EAST PEORIA IL
Zip: 61611
Phone: 866-940-4083*
Email: patty.kweram@trailslibraries.org

Identify Item
Item ID: A12603941260

Hold info
Pickup at: MP_MORTON Expires: 11/29/2025
Comments:
Date suspended: Date unsuspended:
Level/Range
Level: Copy Title
Range: Library Group System
Recall status
 Allow Recall No Recall Recall now (RUSH)
 Make hold first in queue

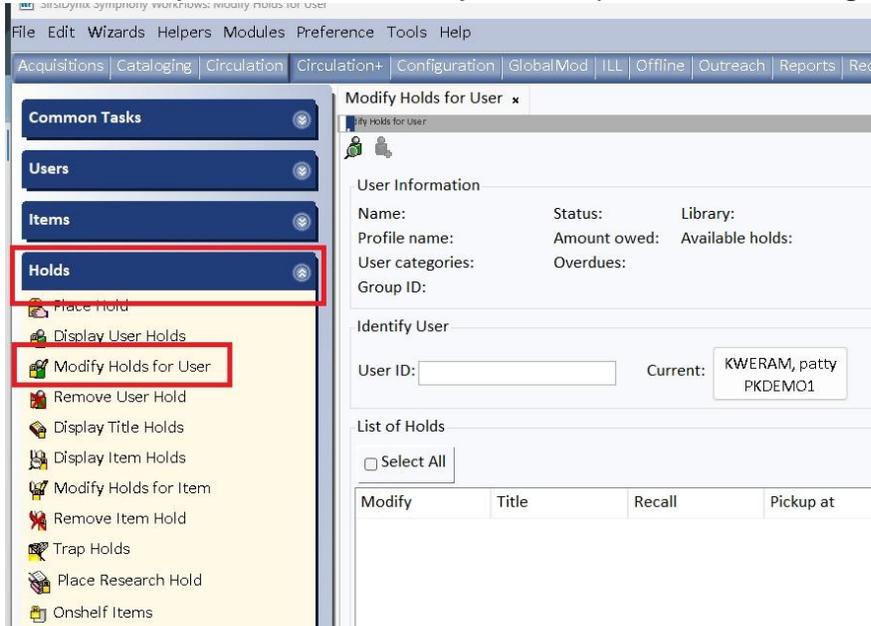
Buttons: Get User Information, Get Item Information, Place Hold, Place Hold for Another User, Close

If successful you will get this message:



Modify Holds

Select Modify Holds for User. Only some aspects of an existing hold may be modified.



Scan the User barcode or use the User Search Helper to see the list of active holds.

Modify Holds for User

My holds for user

User Information

Name: KWERAM, patty Status: DELINQUENT Library: Available holds: 0
Profile name: Amount owed: \$2.00 Overdues: 0 Note: PATTY'S DEMO ACCOUNT.
User categories: NONE Overdues: 0
Group ID: 2037

Identify User

User ID: PKDEMO1

Street: 715 SABRINA LN
City, state: EAST PEORIA IL
Zip: 61611
Phone: 866-940-4083*
Email: patty.kweram@railslibraries.org

List of Holds

Select All

Modify	Title	Recall	Pickup at	Pickup by	Expires	Status	Comment	Record Status	Suspended	Unsusended
<input type="checkbox"/>	The frozen river ...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER
<input type="checkbox"/>	The small and th...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER
<input type="checkbox"/>	How we learn to...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER

Select the hold to modify and choose Modify.

Modify Holds for User

My holds for user

User Information

Name: KWERAM, patty Status: DELINQUENT Library: Available holds: 0
Profile name: Amount owed: \$2.00 Overdues: 0 Note: PATTY'S DEMO ACCOUNT.
User categories: NONE Overdues: 0
Group ID: 2037

Identify User

User ID: PKDEMO1

Street: 715 SABRINA LN
City, state: EAST PEORIA IL
Zip: 61611
Phone: 866-940-4083*
Email: patty.kweram@railslibraries.org

List of Holds

Select All

Modify	Title	Recall	Pickup at	Pickup by	Expires	Status	Comment	Record Status	Suspended	Unsusended
<input checked="" type="checkbox"/>	The frozen river ...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER
<input type="checkbox"/>	The small and th...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER
<input type="checkbox"/>	How we learn to...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER

Get User Information Modify Modify Another User's Holds Close

Only certain details may be modified, typically the pickup library or suspension dates.

Modify Holds for User

Modify Holds for User: KWERAM, patty

U Modify Holds Fields

Allow Recall No Recall Recall now (RUSH)

P Pickup at: WO_WASH-PL Expires: []

L Date suspended: 1/31/2025 Date unsusended: 02/07/2025

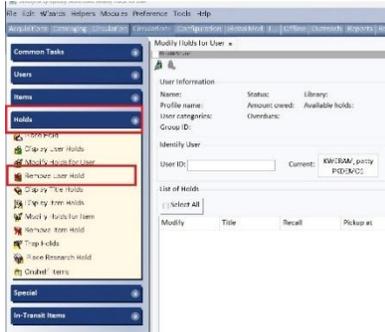
C Comment: Append Replace Remove

ic []

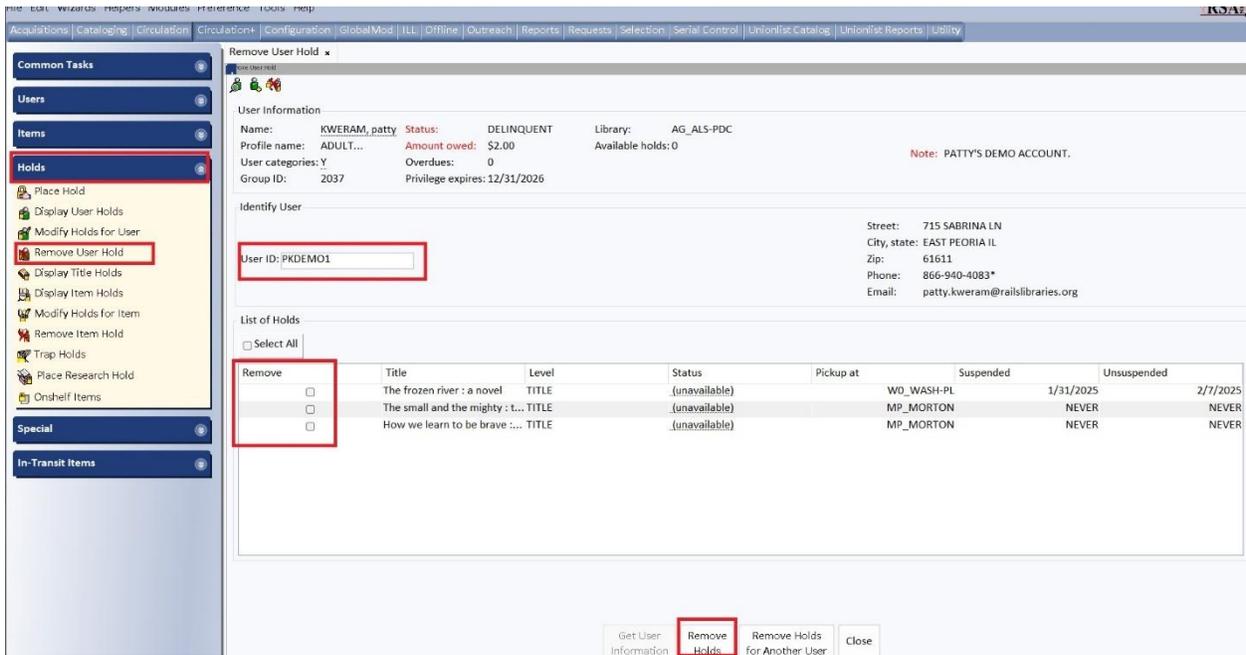
The patron may also modify holds using their RSAcat account.

Remove User Holds

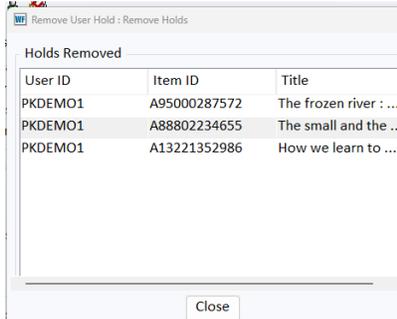
Use when a patron no longer wants to wait for a hold.
Choose Remove User Hold in the Holds group.



Scan or enter the User ID to see a list of active holds. Select the box next to the hold to be removed. Choose Remove Hold.



A confirmation will appear:

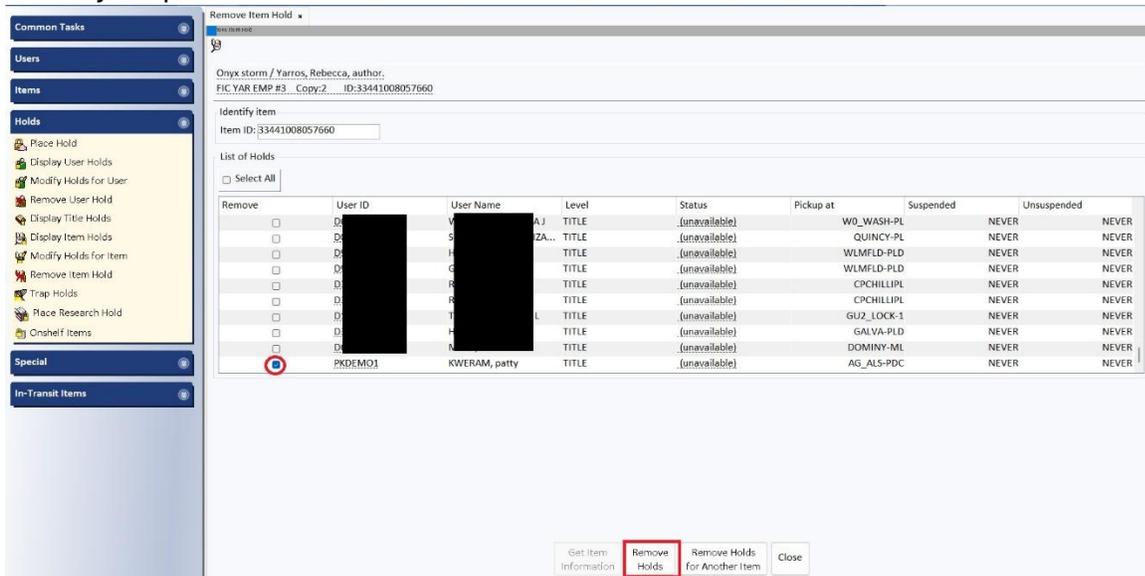


Remove Item Holds

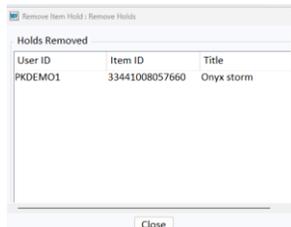
Use when you have the physical item that the patron no longer needs. **Care must be taken to remove the hold for the correct patron when the item has more than one hold on it.** In the Holds group, choose Remove Item Hold.



Scan the item. A list of TITLE and COPY holds on that item will appear. **MAKE SURE** to select your patron's hold!

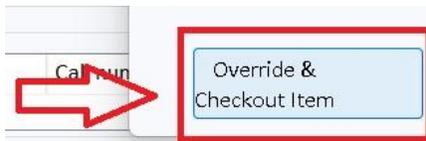
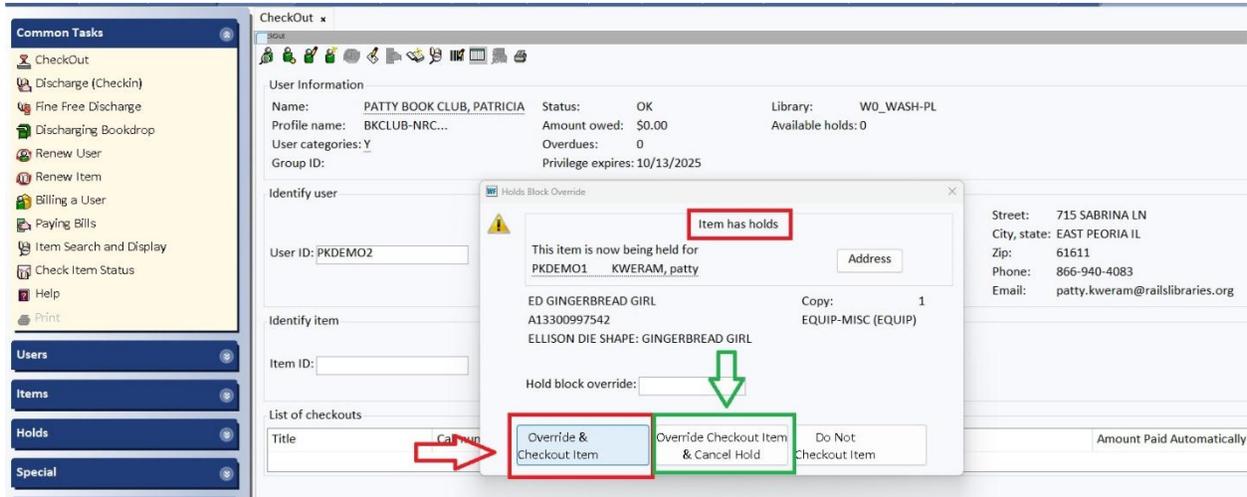


Select the box next to the correct patron's hold and choose Remove Holds. Ensure that the correct hold was removed in the confirmation box.



Tips and Tricks

When checking out an item that has an available hold, a pop-up box appears. Which do you choose and why?



Use **Override & Checkout Item** and enter the standard override when a patron wants to check out the item. A patron with the item in hand has priority over the hold.

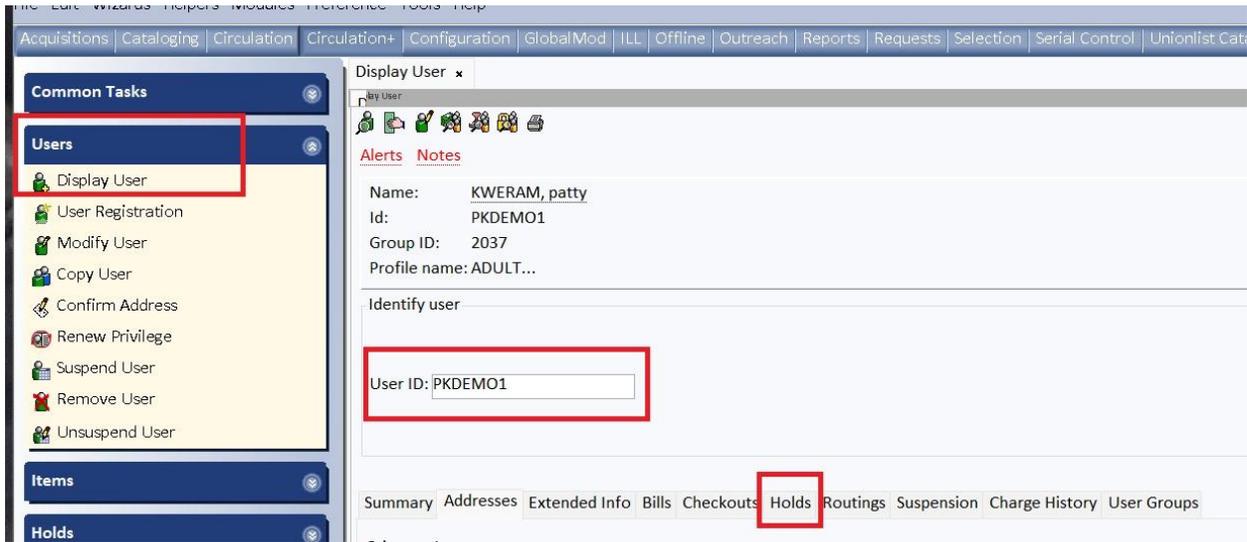


Use **Override Checkout Item & Cancel Hold** and enter the standard override when you are checking out to a patron's family member, like when a parent is checking out an item that is being held on their child's account. **Follow your library policy when choosing this. Your library may require the person picking up the hold to use the library card the hold was placed on.**

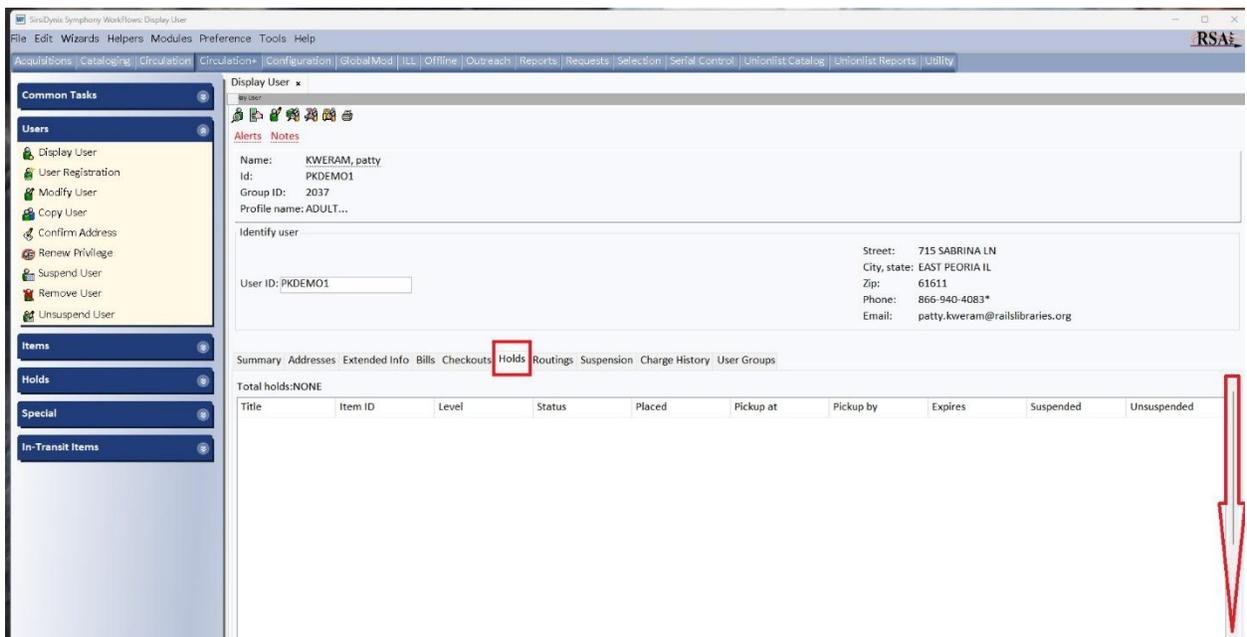
See previous holds

A patron doesn't pick up their hold before the pickup-by date and it is returned/sent to fill the next hold. Or they want to place it on hold again. Find the information in Workflows!

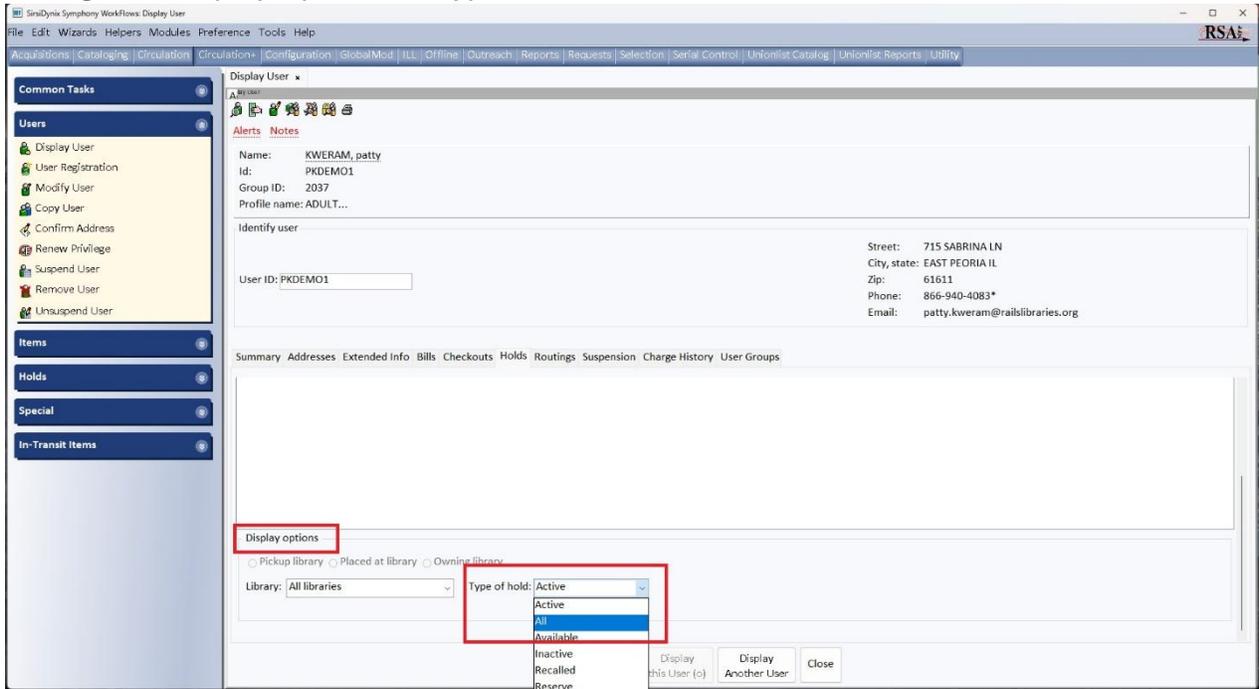
In Circulation+, Users Group, choose Display user and enter the patron information. Choose the Holds tab.



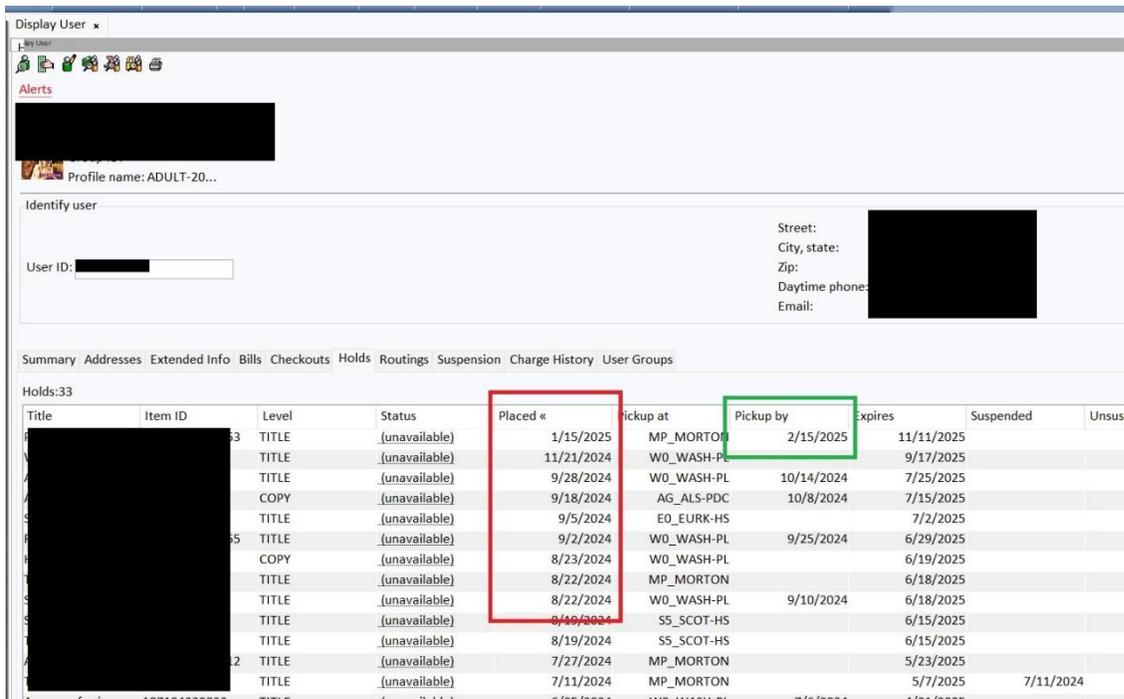
Use the scroll bar on the right to scroll to the bottom of the holds page.



Change the Display Options for Type of Hold from Active to All.



All the holds will be listed. Select a column heading to sort the list of holds. For a hold that had been available it will show the pickup library and the pickup-by date. (Note that sorting doesn't work when there have been blanket holds on the account).



Questions? Contact the RSA Help Desk at help@rsanfp.org or at 866-940- 4083.



Processing Holds Guide

Last updated: February 13, 2025

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Important Terminology

Pick List: A list of items at your library that are requested to fill holds.

PII: Personally Identifiable Information like patron name and barcode.

Trap Holds: A staff-initiated WorkFlows action that indicates an item is filling the requested hold. Trap Holds is the term that WorkFlows uses for filling the hold for the patron, whether that is showing it as available on your library's hold shelf or putting it into transit to a different library. That specific item has been "trapped" for the patron.

Summary of holds processing functions

1. Finding and printing hold requests (pick list).
2. Pull items from the shelf.
3. Trap or discharge the items to indicate they will fill the hold request.
4. For pickup in your library: Place on hold shelf. Contact your patron if necessary.
5. For pickup in another library: Use the appropriate delivery label (RAILS or ILDS) and place the item in the blue delivery bin.
6. Expired available holds (Cleaned Holds) must be discharged and redirected per WorkFlows.

Finding and Printing Hold Requests

Check for hold requests at least once each day you are open. They can be found in WorkFlows or in your RSA email.

Method One – RSA emailed Pick List

Log in to your RSA email. Look for the email HOLD PICK UP LIST. This is the **pick list** of all your items that are requested to fill a hold, either for pickup in your library or to be sent to other libraries. The emailed pick list is the static version; it does not update as holds are filled. If you print the pick list with patron information, ensure that it is shredded when it is not needed anymore.

Method Two – WorkFlows Onshelf Items using the Onshelf Items Wizard

- There is a video guide accompanying this section which can be found here: <https://www.youtube.com/watch?v=fY3DQ0Kv6xY>.
- The Onshelf Items pick list is the same as what is sent to the RSA email, but it is dynamic and updates at 5:00 am, 10:00 am, 12:00 pm, 2:00 pm and 4:00 pm.
- Onshelf Items are those items a patron has placed on hold that are on your library's shelf. This is also called the Pick List.
- Items are on only one library's pick list at a time.
- If you have multiple copies of the title only the one with the matching barcode on the pick list will fill the hold.

Step 1: Accessing Onshelf Items

1. In Circulation+, Open the Holds Group and select Onshelf Items



2. Sort the Onshelf Items List by Current Location
Helpful for grouping items in shelving location order.

Onshelf Items x

On shelf: 23

Onshelf Hold Items: AP_ALPHAPK

Call Number »	Title	Author	Item ID	Item type	Current location	Date/Time Discharged	Pickup Library
152 AME	You, happier : the 7 neur...	Amen, Daniel G., author.	A12603844084	BOOK	NONFICTION	9/13/2023,9:17	NP_NORMAL
355.13 PAT	American heroes	Patterson, James, 1947- ...	A12603996687	BOOK	NEW-NF		NEVER CARTHAGEPL
363.7 BIA	Climate optimism : celeb...	Biabani, Zahra, author.	A12603987719	BOOK	NEW-NF		NEVER CLCHESTER
746.92 FLU	Ralph Lauren : in his own...	Flusser, Alan J., author.	A12604002936	BOOK	NEW-NF		NEVER BO_BROWN-C
809.387 DAU	American scary : a histor...	Dauber, Jeremy, 1973- a...	A12603997803	BOOK	NEW-NF		NEVER I2_IP-GTH
910.4 CAM	Braving it : a father, a da...	Campbell, James, 1961- a...	A12603494261	BOOK	INTRANSIT	1/8/2024,14:22	EUREKA-PLD

- Click the column heading Current Location.
- Now items are grouped by shelving location.

Onshelf Items x

On shelf: 23

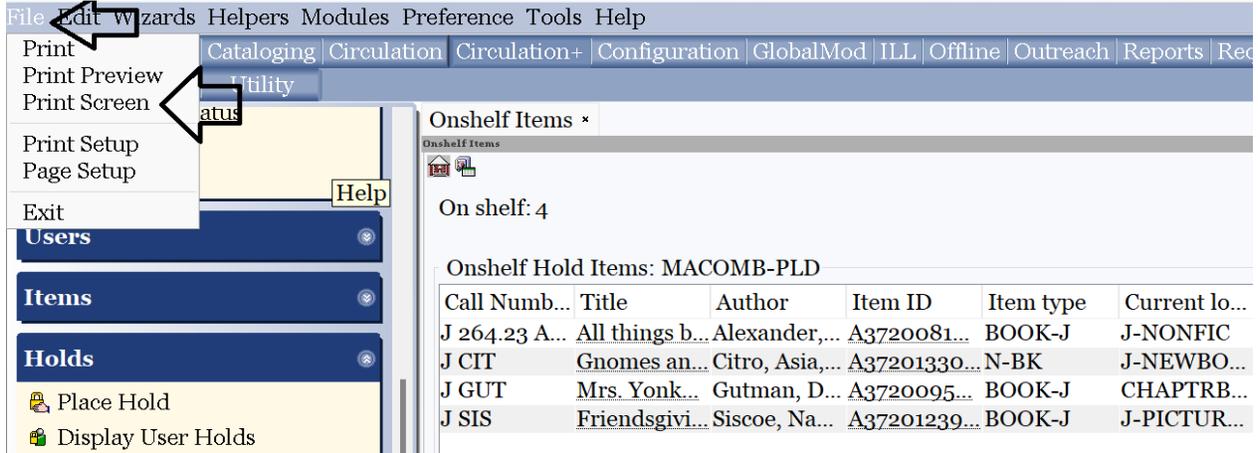
Onshelf Hold Items: AP_ALPHAPK

Call Number	Title	Author	Item ID	Item type	Current location »	Date/Time Discharged	Pickup Library
DVD MULTI MEDIA PIC	Picnic at Hanging Rock		A12603263181	DVD	AV-MOVIE	4/5/2024,12:14	QUINCY-PL
GAME #183 PRIME CLIMB	PRIME CLIMB GAME		A12603826874	TOY	BOARDGAME	5/19/2022,10:51	PONTIAC-PL
F EVERHART	The moonshiner's daughter	Everhart, Donna, author.	A12603739174	BOOK	FICTION	4/25/2024,12:55	NP_NORMAL
F FREEMAN	The Ursulina	Freeman, Brian, 1963- au...	A12603839403	BOOK	FICTION	8/1/2024,14:34	NP_NORMAL
F HARRIS	When maidens mourn : a...	Harris, C. S.	A12603171538	BOOK-PBK	FICTION	9/20/2022,11:11	P8_NORTH
F MORRIS	Angel train	Morris, Gilbert.	A12602757666	BOOK	FICTION	12/14/2022,14:06	MP_MORTON

Step 2: Printing the Pick List

You can print this list using two different methods, Print Screen or using Excel.

Print Screen



- Select File and select Print Screen.
- A new tab opens with the pick list information.
- Right click and select Print.
- This will open the printer dialog box, and you can print from there. If you have a receipt printer, you may have to change the destination printer.

Print from Excel

- Highlight all the items on the Onshelf Items list by clicking on the first item, holding the SHIFT key and using the mouse to drag to the bottom item. Use CTRL+C to copy the items, then open an Excel worksheet and paste the list using CTRL+V. RSA recommends removing the patron information before printing. Anything printed with patron information must be shredded.

The screenshot shows an Excel spreadsheet with the following data:

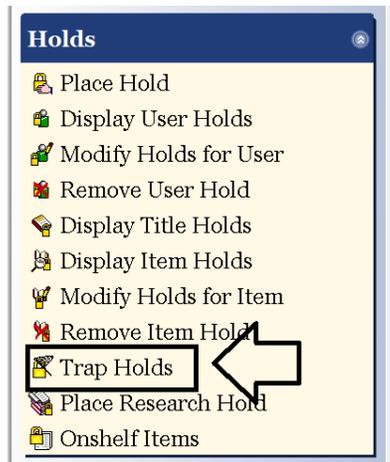
	A	B	C	D	E	F
1	J GUT	Mrs. Yonkers is bonkers!	Gutman, Dan.	A37200955652	CHAPTRBOOK	
2	J CIT	Gnomes and sneezes	Citro, Asia, author.	A37201330017	J-NEWBOOK	
3	J 264.23 ALE	All things bright and beautiful	Alexander, Cecil Frances, 1818-1895.	A37200815771	J-NONFIC	
4	J SIS	Friendsgiving	Siscoe, Nancy, author.	A37201239782	J-PICTUREB	
5						
6						
7						

Step 3: Pull items from the shelf

- Use the pick list to pull the items from your shelf. Make sure to select the item with the same barcode that is on the list.

Step 4: Trap Holds

- Once you have pulled the items on the pick list go to WorkFlows>Holds Group and select Trap Holds.



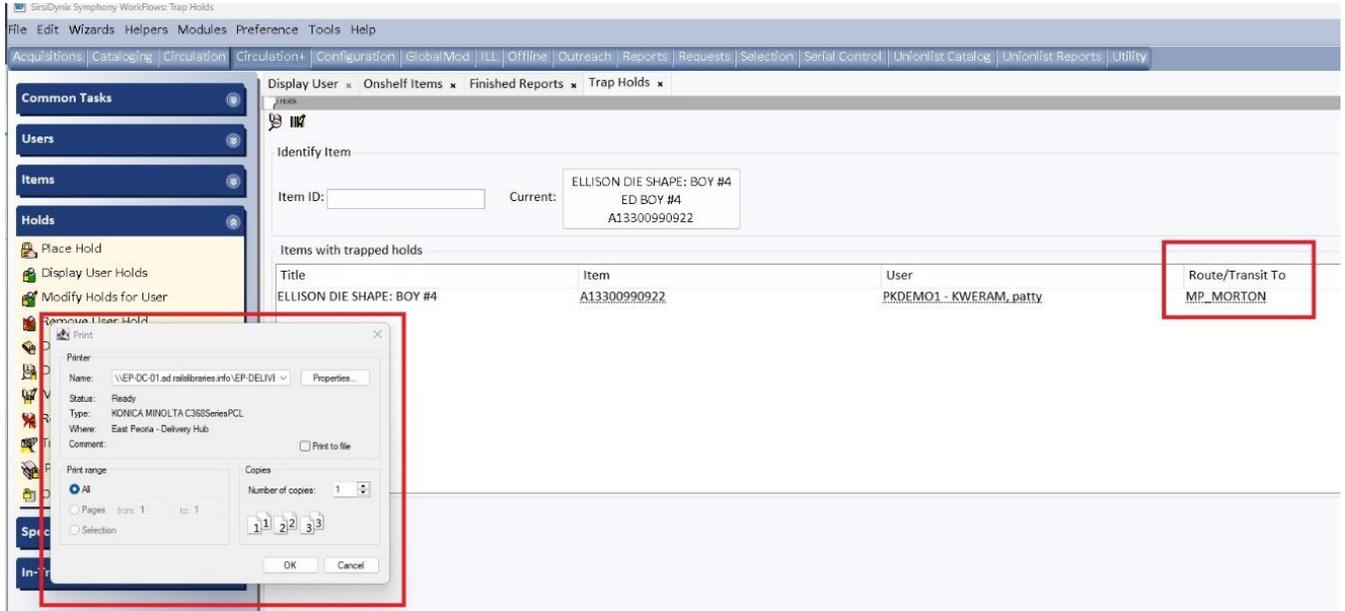
- **Scan each item** (trap the hold)

A screenshot of a web form titled "Trap Holds". The form has a header "Trap Holds" and a sub-header "Identify Item". Below the sub-header is a text input field labeled "Item ID:". Below the input field is a section titled "Items with trapped holds" which contains a table with two columns: "Title" and "Item".

Title	Item
-------	------

- This makes the hold “available” if it is to be picked up at your library or will put it in transit to the requesting library. Watch the screen after scanning each item. It will indicate if it’s for pickup in your library or to be transited.

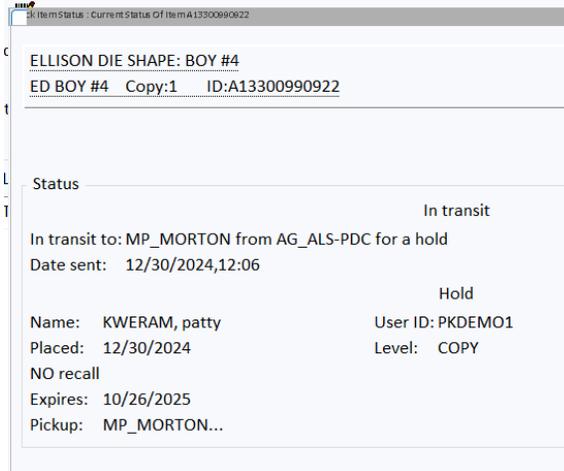
Example: Item to be transited including printer dialog box for printing transit slip.



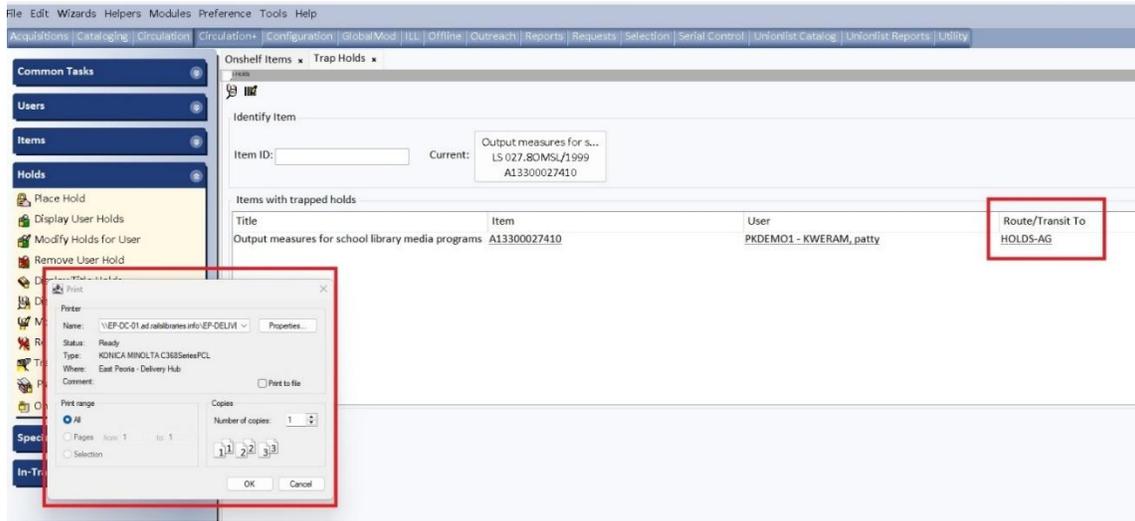
Transit slip



Check item status shows the item is now intransit.



Example: Item available for pickup in your library including printer dialog box for hold available receipt.



Hold Available slip
Shred after patron picks up item

Pickup By: 1/20/2025
Item ID: A13300027410
User name: KWERAM,
patty
Phone number: 866-
940-4083*
User ID PKDEMO1

Check item status shows item is on hold shelf

Output measures for school library media programs / Bradburn, Frances Bryant. LS 027.8OMSL/1999 Copy:1 ID:A13300027410	
Proposed action	Route to HOLDS-AG
Status	Hold
On hold for: KWERAM, patty Phone: 866-940-4083*	User ID: PKDEMO1

- You may print a hold available receipt with PII. (Do not let this slip leave the library. Shred when the item is picked up.) Or use a hold wrapper on an item for pickup in your library. You may place a “transit to” label on an item for delivery. This should not contain PII. See [WorkFlows Supervisor Setup Guide](#) for receipt instructions.

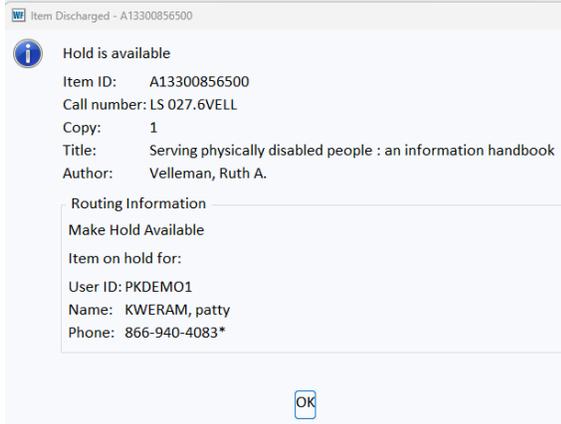
No Holds Found when trapping a hold

- You may get a “No Hold Found” message when trapping a hold. The hold was filled or removed after it appeared on the pick list. Discharge the item and follow WorkFlows instructions for shelving or transiting.

Other holds that need processing: Holds that become available during discharge

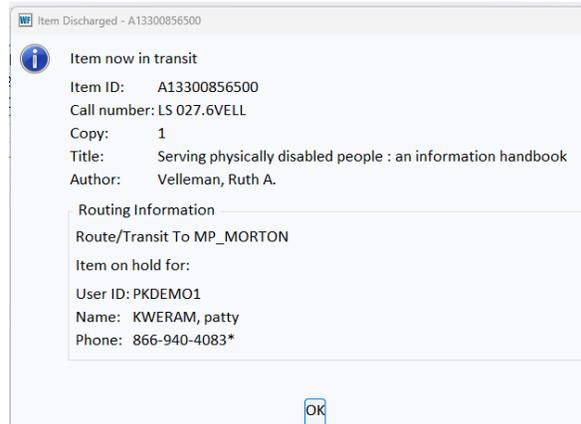
- Upon discharging an item, you may get a pop-up box that indicates an item is needed to fill a hold.

Item for pickup in your library:



This makes the item available.

Item to transit to fill hold:



The item is now intransit to fill the hold.

Once you see the above pop-ups, those items are marked to fill that hold and will drop off a pick list.

Hold Requests Received from a Non-RSA Library

These may come via WorldShare, fax, email, etc. [See the Items Requested by a Non-RSA Library Procedure.](#)

When Items Aren't Available to Fill a Hold

- Mark item Missing: If the item can't be located on the shelf check to see if there are other items on the record. In Onshelf Items, left click on the Title. If there are no other items on that record, contact the patron's home library to remove the hold. They will need to find the item elsewhere. This example has only one item on the record. If there are other items on the record the hold will move to another item.

Hold Shelf Procedures

- If the library's hold shelf is not accessible to patrons, the hold available slip with PII may remain with the item until it is picked up. When the patron checks out the item, the hold available slip needs to be shredded.
- If the hold shelf is accessible to patrons, do not include a hold-available slip with PII. Use a hold wrapper. See [WorkFlows Supervisor Setup Guide](#)

Processing Expired Holds – Clean Hold Shelf

- Monitor the hold shelf for expired holds. The **CLEAN HOLD SHELF LIST** is sent to the RSA email when an item on your hold shelf has “expired” (wasn't checked out by the pickup date, often 10 days after becoming available). Discharge the item and follow WorkFlows instructions. It will either return to your shelf, back to the owning library, or to fill the next hold at your library or another library.
- *When an item is not checked out by the pickup-by date, **it automatically goes back in transit or to the shelving location.** It is imperative that libraries process expired holds as indicated by WorkFlows using either Check Item Status or Discharge.*

Processing Items for Delivery

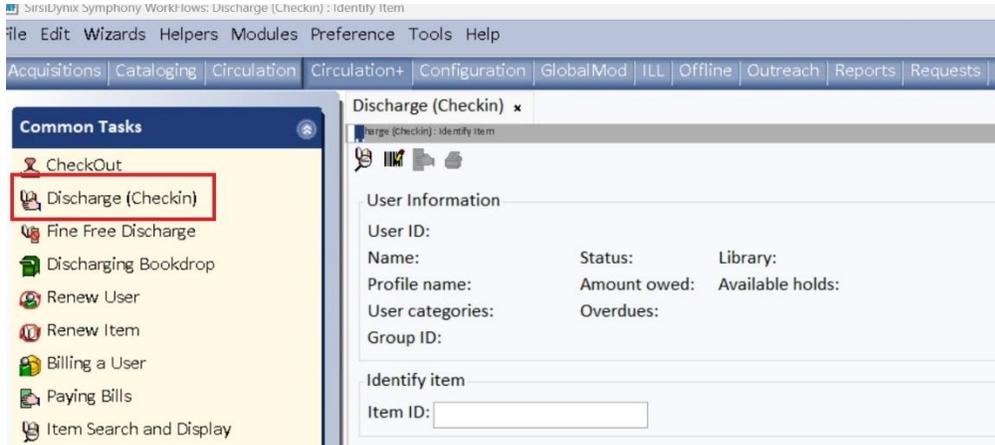
For items transiting to another RSA Library:

Use the RSA Membership list to find the RAILS delivery code and fill out a RAILS delivery slip for each item. Place it in the blue delivery bin.

- See RSA Membership List for delivery codes
<https://support.librariesofrsa.org/about/member-libraries/>
- See RAILS Delivery Labeling instructions
<https://support.librariesofrsa.org/wp-content/uploads/2024/07/RAILS-Delivery-Codes-and-Labeling-Procedure-2024-07-03.pdf>
- For items transiting to a non-RSA library in Illinois:
See Items Requested by a Non-RSA library. <https://support.librariesofrsa.org/wp-content/uploads/2024/03/Items-Requested-by-a-Non-RSA-Library-Procedure-2024-03-19.pdf>
- Use an ILDS label and refer to L2 for the delivery code.
- Refer to RAILS Delivery information. You may need to login with your L2 account for full access. <https://railslibraries.org/delivery>

Processing Items Received in Delivery

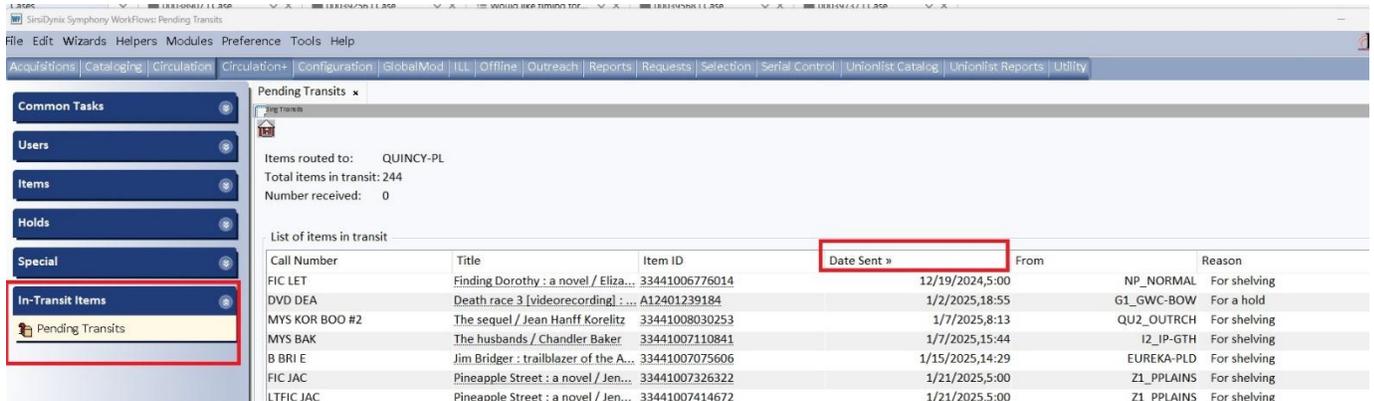
- Go to WorkFlows>Circulation+ Group>Discharge



- Scan item barcode. **Watch the screen for each item.** Discharge ALL items.
- Follow WorkFlows instructions for each item.
- Notify patrons with items on hold per your library's procedures. Shelf your returning items.

Pending Transits

Monitor items transiting to/from your library using the Pending Transits wizard. In WorkFlows: Circulation+>In-transit Items group>Pending Transits wizard.



It may be helpful to sort by date sent. Click on the column to sort by oldest/newest. Check your shelves (including the hold shelf) or contact the transiting library to check their shelves to resolve items still in transit. Discharge the item if found.

Lost in Transit

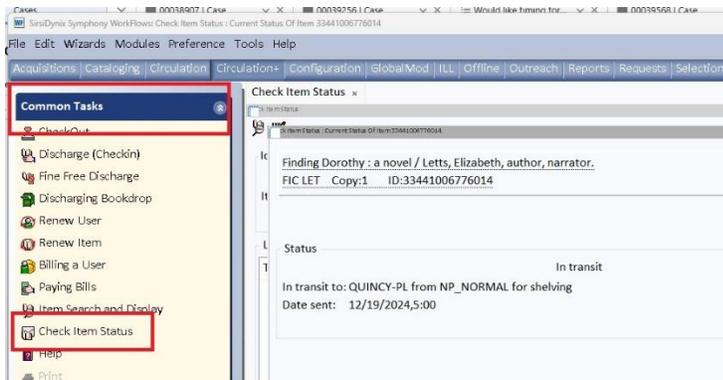
See [Processing LOST-TRANS Lost in transit items](#) [link]

An item is Lost in Transit if it is sent to a library (either to fill a hold or return to the shelf) and it is not discharged or charged to a patron's account and has been in transit for 45 days. If an item is lost in transit, both the owning library and the transiting library should check their shelves, including the hold shelf, for the item. If the item is not found, the owning library may not bill the sending library for the item.

Tips and Tricks

Use Check Item Status to see the status of an item.

Circulation+>Common Tasks group>Check Item Status wizard.



Questions? Contact the RSA Help Desk at help@rsanfp.org or by phone at 866-940-4083.