

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 <u>Items Requested by a Non-RSA Library</u> <u>Procedure.</u>

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 <u>Membership List page</u>) 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. <u>https://support.librariesofrsa.org/project/holds-parameters/</u>

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 onshelf item would not be selected to fill the hold.
  - b. See <u>Why didn't my patron's hold get filled by my item? A Guide</u>

Questions? Contact the RSA Help Desk at <u>help@rsanfp.org</u> 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=2NHSiPzhUvg.

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#### **Related documents**

How Holds Work Guide Processing Holds Guide [link to come] <u>RSA Reciprocity Policy</u> <u>Printed Documents Including Patron PII</u> 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.

SirsiDynic Symphony WorkFlows: Item :	Search and Display			-	D X
File Edit Wizards Helpers Mo	iodules Preference Tools Help				RSA
Acquisitions Cataloging Circu	ulation Circulation+ Configuration GlobalMod  ILL Offlin	ne Outreach Reports Requests Selection S	erial Control   UnionIist Catalog   UnionIist Reports   Utili	ty	
Common Tasks	Item Search and Display x     Issantiant Dayley				
CheckOut	-+AMAR				
(A) Discharge (Checkin)	Author:	AND	V Title:	AND ~	Search
G Fine Free Discharge	Series:	AND	Subject:	AND	Reset
B Discharging Bookdrop	General:	AND	v Periodical Title:		
Benew User	Library: ALL			~	
Renew Item	Current: Finding Dorothy : a novel FIC LET	ID:33441006776014			
🞒 Billing a User					
Paving Bills					
B Item Search and Display					
Check Item Status					
🖬 Help					
a Print					

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

File Edit Wizards Helpers Mo	dules Pref	erence Tools Help									RSA
Acquisitions   Cataloging   Circu	lation Circ	ulation+ Configuration GlobalMod ILL Offlin	e Outreach Reports Reques	ts Selection S	erial Control   Un	ionlist Cat	alog Unionlist Reports	Utility			
State of the second	_	Item Search and Display *									
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2 CheckOut					1						
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P Discharging Bookdrop		General:		AND	<ul> <li>Periodical Titl</li> </ul>	le:					
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Renew Item		Current:									
👔 Billing a User		ADVANCED SEARCH KEYWORD Author PATTER	SON, AND Title ROSE, ALL: 8 re	cords							
Paying Bills		Title	Author				Carrier Type		Pub. Year	Librar	y Copies
B Item Search and Display		Kun, Kose, run : a novei	Parton, Dolly, at	unor, narrator.			audio disc		2022	22	
Check Item Status		Run Rose run	Parton Dolly a	dbor.			volume		2022	1113	
Help		Hill screet bloes. The complete series	Charlenster, Roberts J. Bass			_	videodisc		2014	1	
# Print		Dimanche and other stories	Némirovsky, Irè	ne, 1903-1942.			volume		2010	1	
		Whiskey in the jar [sound recording] : essentia	l Irish drinki						2006	1	
Users	۲	Description Call Number/Item									
Items		M A32200617830 - 1 - BOOK - FICTIO	N	Price:	\$30.0	00	Item type: BOO	Ongoing checkouts: 1	2		
	_	B A F PARTON - AP_ALPHAPK		Home	terony 1: FICTI	ION	Current location: FICI	UT Checkouts to date: 0			
Holds	۲	13602945014 1 POOK CHEC	CODUT - Can't Circ	, Item ca	tegory 3: BOO	к	Item category 4: THR	ILLER Renewals to date: 0			
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Special	۲	A M PAR - AYER-PLD	_	item ca	tegory 7: UND	EFINED	Item category 8: UNI	DEFINED			
In-Transit Items		A36505597452 - 1 - BOOK - FICTIO	DN .	Date cr	eated: 3/15	/2022	Media desk: non	e			
In transic items	•	⇒ ⊕ B0_BROWN-C		Date la	t charged: 8/17	/2023	Previous user ID: D08	0888543			
		PAT - 80_BROWN-C	NA .	Last dis	charged: 9/6/2	2023,23:59	Last activity: 9/6/	2023			
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		BLAND-HIRE									
		A36800505241 - 1 - BOOK - STAC	s								
		BMFIELDPLD				-					
		- FAIT REPERSON		- 1	Detailed Display	Close					
1					octaneo Displa	crose					

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."** 

SirsiDynix Symphony WorkFlows: Item Search and Display						- 0 X
File Edit Wizards Helpers Modules Preference Tools Help						RSA .
Acquisitions Cataloging Circulation Circulation+ Configuration	GlobalMod ILL Offline Outreach Reports Requests Selection Serial	Contr	rol   Unionlist Catalog   I	Unionlist Reports Utility		
Common Tasks	lay x	_				
D. Disebarra (Chashin)	rton. Dolly, author.					
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Discharging Bookdron	ic MARC Holdings Call Number/item Bound-with Orders Serials Ctrl Selec	tions				
		It	em Info Circ Info Bills	Checkouts Holds		
	845014 - 1 - BOOK - CHECKEDOUT - Can't Circ		Call number information	on		
A12603	845022 - 2 - BOOK - FICTION		Call number:	F PARTON	Class scheme:	DEWEY
AYER-PLD	YFR-PLD		Call library:			
Dalitam Search and Display	597452 - 1 - BOOK - FICTION		,			
B0_BROWN	c		Shadow call number	N		
Check Item Status	BROWN-C		Itom information			
En BEARD-H-M	545057 - 1 - BOOK - FICTION		item mormation			
A Print Bric PAR -	BEARD-H-ML		Item ID:	A12603845022	Copy number:	2
Users	743507 - 1 - BOOK - FICTION		Type:	BOOK	Item library:	AP_ALPHAPK
Bing FIC PAT/P	AR - BLAND-HIRE		Users Is a March		Comment la continue	
Items 🛞 Litems A36800	505241 - 1 - BOOK - STACKS		HOME IOCATION:	FICTION	Current location:	FICTION
Holds Date created:	3/15/2022		Item cat1:	FICTION	Item cat2:	ADULT
Date last charged: Date due:	none		Item cat3:	BOOK	Item cat4:	THRILLER
Special 🛞 Last discharged:	9/6/2023,23:59					
Date inventoried:	Never D		Item cat5:	MUSICSUB	Item cat6:	UNDEFINED
Previous user ID:	D080888543		Item cat7:	UNDEFINED	Item cat8:	UNDEFINED
Last activity:	9/6/2023					
In-house uses:	0		Item cat9:	UNDEFINED	Item cat10:	UNDEFINED
			Media desk:		Number of pieces:	1
			Tatalaharan		Delana	
			rotal charges:	14	Price:	\$30.00
			Permanent	Y	Circulate	Y
	Return to Sea	arch	Display Holdings Close			

## <u> Place Hold</u>

• In Circulation+>Holds Group choose Place Hold



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

File Edit Wizards Helpers Modules F	Preference Tools Help	
Acquisitions Cataloging Circulation C	Circulation+ Configuration GlobalMod ILL Offline Outreach Re	eports   Requests   Selection   Serial Control   Unionlist Catalog   Unionlist Reports   Utility
	Item Search and Display * Place Hold *	
Common Tasks		
Users		
	User Information	
Items	Name: Status: Library:	
Sector and the sector	Profile name: Amount owed: Available holds:	6
Holds	Group ID:	
😤 Place Hold		
🗳 Display User Holds	Item information	
💕 Modify Holds for User	Identify User	
🎽 Remove User Hold	User ID:	
🍖 Display Title Holds	Identity item	
📴 Display Item Holds	Pup Pop	
🙀 Modify Holds for Item	Item ID: Current: F PART(	FON
🙀 Remove Item Hold	A1260384	45022
🕰 Trap Holds	Hold Info	
Place Research Hold	Pickup at: MP_MORTON	Expires:
🖞 Onshelf Items	Comments:	
Special	Date suspended:	Date unsuspended:
Special (	Level/Range	Recall status
In-Transit Items	Level: O Copy o Title	
-	Range: O Library O Group System	○ Allow Recall ○ No Recall ○ Recall now (RUSH)

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 <u>placeholder for any holdable item</u> on the record when placing a Title Hold. This is not necessarily the item that will fill the hold.

ê. % 6 m	680								
ser Information	n	-	DEL INCOLEENT.			000			
Name:	KWERAM, patty	Status:	DELINQUENT	Library:	AG_ALS-	PDC			
rofile name:	ADULT	Amount owed:	\$2.00	Available holds:	:0			N	lote: PATTY'S DEMO ACCOUNT.
User categories	: <u>Y</u>	Overdues:	0						
sroup ID:	2037	Privilege expires:	12/31/2026						
tem informatio	on								
entify User									
								Street:	715 SABRINA LN
								City, state:	EAST PEORIA IL
Iser ID: PKDEM	01							Zip:	61611
								Phone:	866-940-4083*
								Email:	patty.kweram@railslibraries.org
tem ID:		Currei t:	Run, Rose, run F PARTON		3				
Iold Info									
ickun at:	MP MORTON			Expires:	11/18/	2025	A		
and a star	_monor	v		- and a set	12/ 10/		•		
omments:		1							
ate suspended		4		Date unsuspende	ia:				
Level/Range						Recall sta	tus		
Level: O Cop	y o Title					O Allow F	Recall o No Re	call 🔿 Recall no	w (RUSH)

#### 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.

ser Information			
Name: KWERAM, patty Profile name: ADULT User categories: Y Group ID: 2037	Status:DELINQUENTAmount owed:\$2.00Overdues:0Privilege expires:12/31/2026	Library: AG_ALS-PDC Available holds: 0	Note: PATTY'S DEMO ACCOUNT.
un, Rose, run / Parton, Dolly, auti IC PAR Copy:1 ID:A3670114	hor. 3774		
dentify User Jser ID: <mark>PKDEMO1</mark>			Street: 715 SABRINA LN City, state: EAST PEORIA IL 7ip: 51511 Phone: 866-940-4083* Email: patty.kweram@railslibraries.org
dentify item tem ID: A36701143774 told lofo		Tu (10/007	1
Comments: Date suspended:	*	Date unsuspended:	f
Level/Range Level: O Copy O Title Range: O Library O Group O Sy	rstem	Recall status O Allow Reco	all <b>o</b> No Recall <sub>O</sub> Recall now (RUSH)
Make hold first in queue			

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 windo	W			
Date suspended:	01/28/2025 🛞		Date unsuspended: 02	2/02/2025	۲

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	Recall status
Level: Ocopy Title Range: Library Oroup System	⊖ Allow Recall <b>○</b> No Recall ⊖ Recall now (RUSH)

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.

Pickup at: MP_MORTON v	Expires: 11/1	8/2025
Comments: place at drive-up window		
Date suspended: 1/28/2025	Date unsuspended: 2/2/	2025
Level: Ocopy Title Range: Library Oroup System		⊖ Allow Recall ● No Recall ⊖ Recall now (RUSH)
□ Make hold first in queue		

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

₩ Complete ×
A hold has been placed on the item
Run, Rose, run
Parton, Dolly, author.
FIC PAR
A36701143774
Place Hold for Another User
Place Another Hold for This User
Remove This Hold
Modify This Hold
Close

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

	W Place Hold : No Hold Allowed Override
	Hold not allowed
	AD PIG (3-D) Copy: 1
	A13300996431
	ACCUCUT DIE SHAPE: PIG (3-D)
	No hold allowed override
1	
	Override & Place Hold Do Not Place Hold
ļ	

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 <sup>9</sup> to search for the requested item.

User Informatic			
Name:	KWERAM, patty	Status:	DELI
Profile name:	ADULT	Amount owed:	\$2.00
User categories	s: <u>Y</u>	Overdues:	0
Group ID:	2037	Privilege expires	: 12/3
Item informat	ion		
Identify User			
	101		

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

PI	ace Hold ×		
	Hold		
l de	e Hold : Item Search		- 🗆 ×
	<b>*</b> • • • • •		
	Search for:	v	Search
	F Index:	Title	Type:
	L Library:	ALL ~	Keyword
	¢		OBrowse
	Current:	Kock Harbor Search and Rescue / by Colleen Co JF COB ID:A3650/089/48	<ul> <li>Exact</li> </ul>

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

Hold : Item Search	m m // 10								- 0
Search for:	frozen river							~	Search
Index:	Title							~	Type:
Library:	ALL 🗸								
Current:	Rock Harbor Search and Rescue / by Collee	en Co JF COB ID:A36507	089748						⊖ Brows
KEYWORD T	Title frozen river. ALL: 13 records								Orader
Title			Carrier Typ	e		Pub. Year	Libra	ry Copies	
Secrets of the forest : 15 bedtime stories inspired by Klepeis, Alicia, 1971- author				volume			2023	1	
The frozen	The frozen river : a novel Lawhon, Ariel, author, narr			other			2023	6	
The frozen river : a novel Lawhon, Ariel, author.			volume 2023			2023	14		
	T LAW - AASTOR-PLD IA27000174954 - 1 - BOOK - INTRANSIT ISON-PL IA32200645964 - 1 - BOOK - CHECKEDOUT ALPHAPK IA12603943250 - 1 - BOOK - CHECKEDOUT 3-PLD IAW - AYE-PLD IA36505629966 - 1 - BOOK - CHECKEDOUT 3ROWN-C	- Can't Circ - Can't Circ - Can't Circ	Item category 1: F Item category 3: B Item category 5: M Item category 7: U Item category 7: U Date created: 1 Date last charged: 1 Date inventoried: N Times inventoried: 0	CTION OOK IYSTERY NDEFINED NDEFINED 2/5/2023 /22/2025 /22/2025,7:33 ever	Lurrent location: Item category 2: Item category 4: Item category 6: Item category 8: Item category 10: Media desk: Previous user ID: Last activity: Total checkouts: In-house uses:	ADULT BIO-FIC UNDEFINED UNDEFINED UNDEFINED UNDEFINED UNDEFINED 1/22/2025 17 0	Ongoing renewais: Checkouts to date: Renewals to date: Date last cleared:	1 0 1/2/:	2025
			Place Hold Cancel						

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

face Hold ×									
INE									
1416B	89								
User Information									
Name: KM	ERAM, patty Status	DELIN	QUENT	Library:	AG_ALS-PDC				
Profile name: AD	ULT, Amou	nt owed: \$2.00		Available holds:	0			N	ote: PATTY'S DEMO ACCOUNT.
User categories: Y	Overd	ues: 0							
Group ID: 20	37 Privile	ge expires: 12/31	/2025						
The frozen river : a n	ovel / Lawhon, Ariel,	author.							
FLAWHON Copy:1	ID:A12603943260	2							
Identify User									
								Street:	715 SABRINA LN
								City, state	EAST PEORIA IL
User ID: PKDEMO1								Zip:	61611
								Phone:	866-940-4083*
								Email:	patty.kweram@railslibraries.o
Identify item									
Item ID: A12603943	260								
Hold Info									
Pickup at: MI	_MORTON			Expires:	11/20/2025				
Comments:									
Date suspended:	+			Date unsuspended	l:				
Level/Range					Rei	all status			
Level: O Copy O	Title								
Range: O Library	🖯 Group 💿 System				0	Now Reca	sil o No Recall (	C Recall nov	v (RUSH)
Make hold first in	queue								
						_			

#### If successful you will get this message:



# Modify Holds

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

Common Tasks	Modify H	olds for User 🗴			_
Users	💿 🏂 🖡 User In	formation			
Items	Name:	namo	Status:	Librar	ry:
Holds	Office     Office	tegories: D:	Overdues:	Availo	able fiolds.
🕰 Flace Holds	Identify	User			
Modify Holds for User	User ID	:	Cu	rrent:	KWERAM, patty PKDEMO1
🍋 Display Title Holds	List of I	Holds			
🙀 Display Item Holds	🗆 Sele	ct All			
🙀 Modify Holds for Item	Modify	Title	Reca	all	Pickup at
🙀 Remove Item Hold	Would	Inde	need		i ickup ut
💐 Trap Holds					
🙀 Place Research Hold					
街 Onshelf Items					

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

Aodify Holds for	User 🗴									
If Holds for User										
ð 🔒										
User Informatio	n									
Name:	KWERAM, patty	Status:	DELINQUENT	Library:						
Profile name:		Amount owed	\$2.00	Available holds: 0			Note: P	ATTY'S DEMO ACCOUNT		
User categorie	s: NONE	Overdues:	0				inotor i			
Group ID:	2037									
Identify User										
							Street:	715 SABRINA LN		
							City, state	EAST PEORIA IL		
User ID: PKDEN	101						Zip:	61611		
							Phone:	866-940-4083*		
							Email:	patty.kweram@railslibrari	es.org	
List of Holds										
- Select All										
Modify	Title	Recall	Pickup at	Pickup by	Expires	Status	Comm	ent Record Status	Suspended	Unsuspended
0	The frozen rive	r NO	MP_MORTO	ON	11/20/2025	(unavailable)			NEVER	NEVE
0	The small and t	:h NO	MP_MORTO	N	11/20/2025	(unavailable)			NEVER	NEVE
0	How we learn t	to NO	MP_MORTO	ON	11/20/2025	(unavailable)			NEVER	NEVE

Select the hold to modify and choose Modify.

Aodify Holds for	User x					_		_				
5 6.												
liese informatio												
Name: Profile name:	KWERAM, patty	Status: D Amount owed: \$	ELINQUENT 2.00	Library: Available holds: 0			Note: P	ATTY'S DEM	O ACCOUNT.			
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							City, state	EAST PEOP	RIA IL			
User ID: PKDEM	01						Zip:	61611				
							Phone:	866-940-4	083*			
							Email:	patty.kwe	ram@railslibrarie	es.org		
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Only certain details may be modified, typically the pickup library or suspension dates.

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lc		Comment: O Append O Replace O Remove	

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.

Common Tasks	<ul> <li>many nous for oser s</li> </ul>		
	44		
Joers	User Information		
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an love ton hou			
Trap Holds			
Roce Research Hold			
" Crubel' terrs			
pecial			

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.

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Display Title Holds	User ID: PKDEMO1			Zip: 61611		
B Display Item Holds				Email: patty.kweram@r	ailslibraries.org	
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	-					
			Get User Remove Remov	ve Holds Close		
			Information Holds for Ano	ther User		

# 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.

ltems	8
Holds	۲
Place Hold	
🔒 Display User Holds	
💕 Modify Holds for User	
📸 Remove User Hold	
💊 Display Title Holds	
🚱 Display Item Holds	
Modify Holds for Item	
🧏 Remove Item Hold	
🏘 Trap Holds	
🙀 Place Research Hold	
An Onshelf Items	

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

Concession of the local division of the loca	Remove Item Hold *							
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In-Transit Items 💮				Get Item Information	Remove Holds Holds for Another Item	Close		

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.

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## Tips and Tricks

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

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🚇 Discharge (Checkin)	User Information						
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Check Item Status			PKDEMO1 KWE	RAM, patty	Address	Phone:	866-940-4083
P Help			ED GINGERBREAD G	IRL	Copy: 1	Email:	patty.kweram@railslibraries.org
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Presented .		21	Checkout Item	& Cancel Hold	Checkout Item		
Special		-					

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.



Override & Checkout Item

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.

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

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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).

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Questions? Contact the RSA Help Desk at <u>help@rsanfp.org</u> 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: <u>https://www.youtube.com/watch?v=fY3DQ0Kv6xY</u>.
- 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							
The If the #16							
<b>H</b>							
					_		
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	9/13/2023,9:1	7 NP NORMAL
							100000 mmm 1011000000000000000000000000
355.13 PAT	American heroes	Patterson, James, 1947	A12603996687	BOOK	NEW-NF	NEVE	R CARTHAGEPL
355.13 PAT 363.7 BIA	American heroes Climate optimism : celeb	Patterson, James, 1947 Biabani, Zahra, author.	A12603996687 A12603987719	BOOK BOOK	NEW-NF NEW-NF	NEVE	R <u>CARTHAGEPL</u> R <u>CLCHESTER</u>
355.13 PAT 363.7 BIA 746.92 FLU	American heroes Climate optimism : celeb Ralph Lauren : in his own	Patterson, James, 1947 Biabani, Zahra, author. Flusser, Alan J., author.	A12603996687 A12603987719 A12604002936	BOOK BOOK BOOK	NEW-NF NEW-NF NEW-NF	NEVE NEVE NEVE	R <u>CARTHAGEPL</u> R <u>CLCHESTER</u> R <u>B0_</u> BROWN-C
355.13 PAT 363.7 BIA 746.92 FLU 809.387 DAU	American heroes Climate optimism : celeb Ralph Lauren : in his own American scary : a histor	Patterson, James, 1947 Biabani, Zahra, author. Flusser, Alan J., author. Dauber, Jeremy, 1973- a	A12603996687 A12603987719 A12604002936 A12603997803	BOOK BOOK BOOK BOOK	NEW-NF NEW-NF NEW-NF NEW-NF	NEVE NEVE NEVE NEVE	R CARTHAGEPL R CLCHESTER R BO_BROWN-C R I2_IP-GTH

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

1	Onshelf Items 🗙							
ſ	The if its rm							
1	<b>A</b>							
ľ						_		
	On shelf: 23							
	Onshelf Hold Items: AP_AL	РНАРК				<b>_</b>		
	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	4/5/2024,12:1	4 QUINCY-PL
	GAME #183 PRIME CLIMB	PRIME CLIMB GAME		A12603826874	TOY	BOARDGAME	5/19/2022,10:5	51 PONTIAC-PL
	F EVERHART	The moonshiner's daughter	Everhart, Donna, author.	A12603739174	BOOK	FICTION	4/25/2024,12:5	5 NP_NORMAL
	F FREEMAN	The Ursulina	Freeman, Brian, 1963- au	A12603839403	BOOK	FICTION	8/1/2024,14:3	4 NP_NORMAL
	F HARRIS	When maidens mourn : a	Harris, C. S.	A12603171538	BOOK-PBK	FICTION	9/20/2022,11:1	1 P8_NORTH
	F MORRIS	Angel train	Morris, Gilbert.	A12602757666	BOOK	FICTION	12/14/2022,14:0	6 MP_MORTON

## Step 2: Printing the Pick List

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

#### **Print Screen**

File Edit Wizards	Helpers Modules	Pr	eference Tool	s Help				
Print	Cataloging	atic	on Circulation	+  Configurat	ion  GlobalM	od   ILL   Offlin	ne   Outreach	Reports Rec
Print Preview	Utility							
Print Screen	atus		Onshelf Items	×				
Print Setup			Onshelf Items					
Page Setup			📾 🖳					
Exit	Help		On shelf: 4					
Users	0							
			Onshelf Hole	d Items: MAC	COMB-PLD			
Items	۲		Call Numb	Title	Author	Item ID	Item type	Current lo
			J 264.23 A	All things b	Alexander,	A3720081	BOOK-J	J-NONFIC
Holds	۲		J CIT	Gnomes an	Citro, Asia,	A37201330	N-BK	J-NEWBO
Place Hold		Ш	J GUT	Mrs. Yonk	Gutman, D	A3720095	BOOK-J	CHAPTRB
		ш	J SIS	Friendsgivi	Siscoe, Na	A37201239	BOOK-J	J-PICTUR
🧌 Display User H	Holds				,			

- a. Select File and select Print Screen.
- b. A new tab opens with the pick list information.
- c. Right click and select Print.
- d. 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**

a. 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 CTLR+C to copy the items, then open an Excel worksheet and paste the list using CTLR+V. RSA recommends removing the patron information before printing. Anything printed with patron information must be shredded.

G	9 ~	$\therefore f_x \sim f_x$				
	А	В	С	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.

Holds ®	
😤 Place Hold	
🗳 Display User Holds	
🖋 Modify Holds for User	
🗯 Remove User Hold	
🗣 Display Title Holds	
🗯 Display Item Holds	
🍟 Modify Holds for Item	
🧏 Remove Item Hol	
🌋 Trap Holds 🧹 📃	
Place Research Hold	
🔁 Onshelf Items	

• Scan each item (trap the hold)

Trap Holds ×	
Trap Holds	
Identify Item	
Item ID:	
Items with trapped holds	
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.

man Tarla	Display User * Onshelf Items * Finished Repor	ts x Trap Holds x		
imon Tasks				
s (	Identify Item			
is (j	Item ID: Current	ELLISON DIE SHAPE: BOY #4 ED BOY #4 A13300990922		
lace Hold	Items with trapped holds			
Display User Holds	Title	Item	User	Route/Transit To
Print Printer Name: \\EP-DC-01.ad railsi&raries.mfo' Status: Ready	EP-DELINI V Properties_			
Type: KONICA MINOLTA C368SeriesP Where: East Peoria - Delivery Hub Comment:	Print to file			

Check item status shows the item is now intransit.

Transit slip

Transit date: 12/30/2024,12:22	C ELLISON DIE SHAPE: BOY #4 ED BOY #4 Copy:1 ID:A133009 t	ELLISON DIE SHAPE: BOY #4 ED BOY #4 Copy:1 ID:A13300990922			
PDC					
PDC	Status				
tem ID: A13300990922	In transit to: MD_MORTON from AC	In transit			
Title: ELLISON DIE	Date sent: 12/30/2024,12:06				
SUADE, DOV #4		Hold			
SHAPE: BUY #4	Name: KWERAM, patty	User ID: PKDEMO1			
Transit reason: HOLD	Placed: 12/30/2024	Level: COPY			
	NU recall Expires: 10/26/2025				
Transit to: MP_MORTON	Pickup: MP_MORTON				

**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

LS 027.8OMSL/1999 Copy:1	ID:A13300027410		
Proposed action			
rioposed action	Route to HOLDS-AG		
Status	Hold		
On hold for: KWERAM, patty	User ID: PKDEMO1		
Dhonoy 966 040 4092*			

 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 <u>WorkFlows Supervisor Setup Guide</u> 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:	Item to transit to fill hold:
Item Tor pickup in your tibrary:         Image: Item Discharged - A13300856500         Item ID:       A13300856500         Call number: LS 027.6VELL         Copy:       1         Title:       Serving physically disabled people : an information handbook	Item LO transit to fitt hold:         Item Discharged - A13300856500         Item now in transit         Item ID:       A13300856500         Call number: LS 027.6VELL         Copy:       1         Title:       Spring physically disabled acoults : an information handbook
Author: Velleman, Ruth A. Routing Information Make Hold Available Item on hold for: User ID: PKDEMO1 Name: KWERAM, patty Phone: 866-940-4083*	Author:       Velleman, Ruth A.         Routing Information
M This makes the item available.	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. <u>See the Items Requested by a Non-RSA</u> <u>Library Procedure</u>.

## When Items Aren't Available to Fill a Hold

• <u>Mark item Missing:</u> 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.

Onshelf Items	t t d di		a a			1.01	
Jishen items x							
G							
On shelf: 3							
Onshalf Hold Itoms							
Call Number »	Title		Author	Item ID	Item type	Current location	Date/Time Disc Dickup Libra
ED GINGERBREAD G	FLUSON DIE SHAPE: GINGE	RBREAD GIRL	Aution	A13300997542	EQUIP-MISC	FOUR	3/19/2024 14:38 AG ALS-PD0
ED GIRL #5	ELLISON DIE SHAPE: GIRL #	5		A13301153573	EQUIP-MISC	EQUIP	6/18/2024,14:31 AG_ALS-PD0
ED GIRL, GENERIC	ELLISON DIE SHAPE: GIRL, O	GENERIC		A13300876322	EQUIP-MISC	EQUIP	7/10/2024,15:47 AG_ALS-PD0
			JL				
			57				
			V				
		W Onshelf Items	Glossary				
				Bibli	iographic Info		
		Equipment	name: ELLISON DIE SHAF	E: GINGERBREAD GIR	L		
				Volum	e And Copy Info		
				(Displayi	ng 1 of 1 volumes)		
		ED GINGER	BREAD GIRL		(	Copies: 1 Library:	AG_ALS-PDC
		Copy: 1	ID: A13300997542	EQUIP-MISC (EQU	IP) Holds: 1		
					Close		

• To mark the item missing: With the missing item highlighted, select Mark Item Missing. It's best to trap all the found holds before marking an item missing in Onshelf Items. If a missing item is found, discharging it will take the item out of missing status.

Onshelf Items ×						
國金						
On shelf: 1						
Onshelf Hold Items: AG_ALS-PDC						
Coll Number * Title	Author	Item ID	Hem type		Current location	Date/Time Dischar Pickep
ED GINGERBREAD G ELLISON DIE SHAPE		A13300997542	EQUIP-M	ISC	EQUIP	3/19/2024,14:38 AG_A
				_		
		1	rao Hold for	Mark Item		
		Se	lected Copy	Missing	Unfill Hold Pri	nt Close

- <u>Checkout to NO-TRANSIT</u> If the item is damaged or is needed to stay in your library (like on a display) you may check it out to your NO-TRANSIT user. NO-TRANSIT should be used sparingly, and not for a group of items, like NEW items.
- See <u>Using a NO-TRANSIT Account Cheat Sheet</u>

## 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 <u>WorkFlows Supervisor Setup Guide</u>

## 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 <u>https://support.librariesofrsa.org/wp-content/uploads/2024/07/RAILS-Delivery-</u> <u>Codes-and-Labeling-Procedure-2024-07-03.pdf</u>
- For items transiting to a non-RSA library in Illinois: See Items Requested by a Non-RSA library. <u>https://support.librariesofrsa.org/wp-content/uploads/2024/03/Items-Requested-by-a-Non-RSA-Library-Procedure-2024-03-19.pdf</u>
- 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. <u>https://railslibraries.org/delivery</u>

# **Processing Items Received in Delivery**

• Go to WorkFlows>Circulation+ Group>Discharge

SirsiDynix Symphony WorkFlows: Discharge (Checkin) :	Identify Item			
ile Edit Wizards Helpers Modules Pre	eference Tools Help			
Acquisitions Cataloging Circulation Cir	rculation+ Configuration	GlobalMod   ILL   Off	line   Outreach   Rep	oorts   Requests   S
	Discharge (Checkin) ×			
Common Tasks	harge (Checkin) : Identify Item			
🙎 CheckOut	🧏 🖬 👘 🖷			
😫 Discharge (Checkin)	User Information			
Vig Fine Free Discharge	User ID:			
😭 Discharging Bookdrop	Name:	Status:	Library:	
😰 Renew User	Profile name:	Amount owed:	Available holds:	
🔞 Renew Item	Group ID:	Overdues.		
😭 Billing a User	Identify item			
Paying Bills	Item ID:			
😫 Item Search and Display				

- 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. Shelve 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.

SirsiDynix Symphony WorkFlows: Pending Tran	i Lase 🗸 x i 🔳 Uxikiy/ob i Lase nsits	✓ X : := would like timing for ∨ X :		X   = 0003973711.358 V X		
File Edit Wizards Helpers Module	s Preference Tools Help					C
Acquisitions Cataloging Circulation	n Circulation+ Configuration Glob	alMod ILL Offline Outreach Reports	Requests Selection Ser	ial Control   Unionlist Catalog   Unionlist R	eports Utility	
	Pending Transits ×					
Common Tasks	Ting Transis					
Users	Items routed to: QUIN	VCY-PL				
Items	Total items in transit: 244 Number received: 0					
Holds	List of items in transit —					
Special	Call Number	Title	Item ID	Date Sent »	From	Reason
	FIC LET	Finding Dorothy : a novel / Eliza	33441006776014	12/19/2024,5:00	NP_NORMAL	For shelving
In-Transit Items	DVD DEA	Death race 3 [videorecording] :	A12401239184	1/2/2025,18:55	G1_GWC-BOW	For a hold
Panding Transits	MYS KOR BOO #2	The sequel / Jean Hanff Korelitz	33441008030253	1/7/2025,8:13	QU2_OUTRCH	For shelving
	MYS BAK	The husbands / Chandler Baker	33441007110841	1/7/2025,15:44	I2_IP-GTH	For shelving
	B BRI E	Jim Bridger : trailblazer of the A	33441007075606	1/15/2025,14:29	EUREKA-PLD	For shelving
	FIC JAC	Pineapple Street : a novel / Jen	33441007326322	1/21/2025,5:00	Z1_PPLAINS	For shelving
	LTFIC JAC	Pineapple Street : a novel / Jen	33441007414672	1/21/2025,5:00	Z1 PPLAINS	For shelving

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 <u>help@rsanfp.org</u> or by phone at 866-940-4083.