



Processing Holds Guide

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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

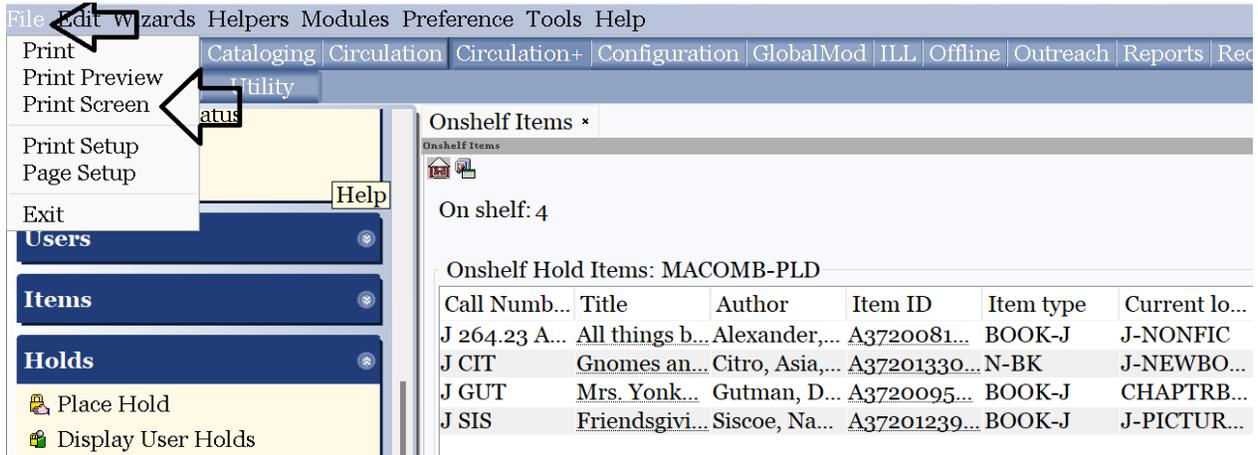
Onshelf Hold Items: AP_ALPHAPK

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.

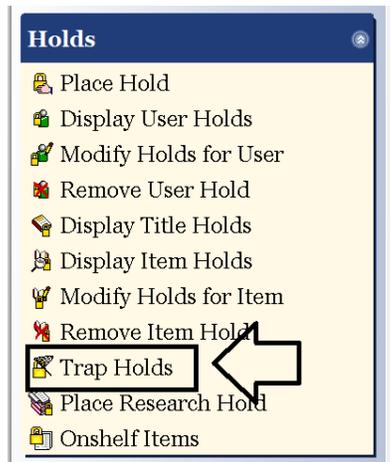
	A	B	C	D	E	F
1	J GUT	Mrs. Yonkers is bonkers!	Gutman, Dan.	A37200955652	CHAPTRBOOK	
2	J CIT	Gnomes and sneezes	Citro, Asia, author.	A37201330017	J-NEWBOOK	
3	J 264.23 ALE	All things bright and beautiful	Alexander, Cecil Frances, 1818-1895.	A37200815771	J-NONFIC	
4	J SIS	Friendsgiving	Siscoe, Nancy, author.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



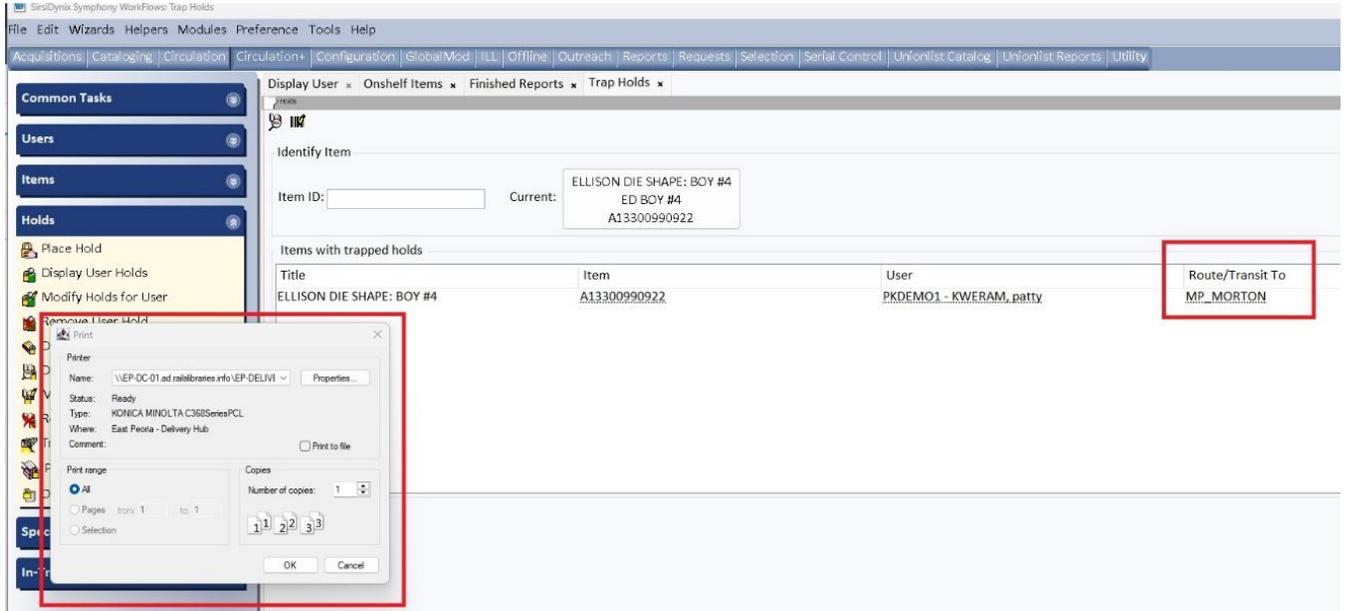
- **Scan each item** (trap the hold)

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
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- 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.

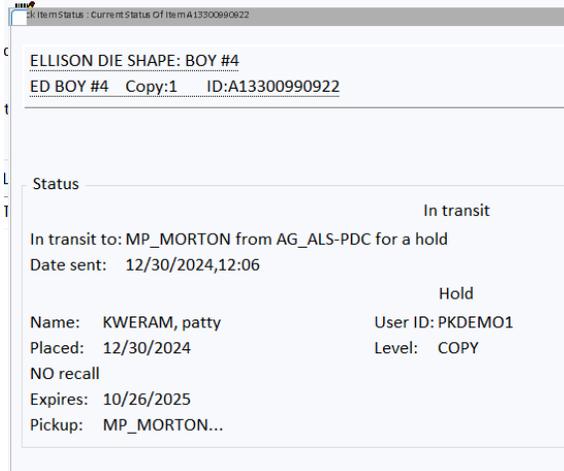
Example: Item to be transited including printer dialog box for printing transit slip.



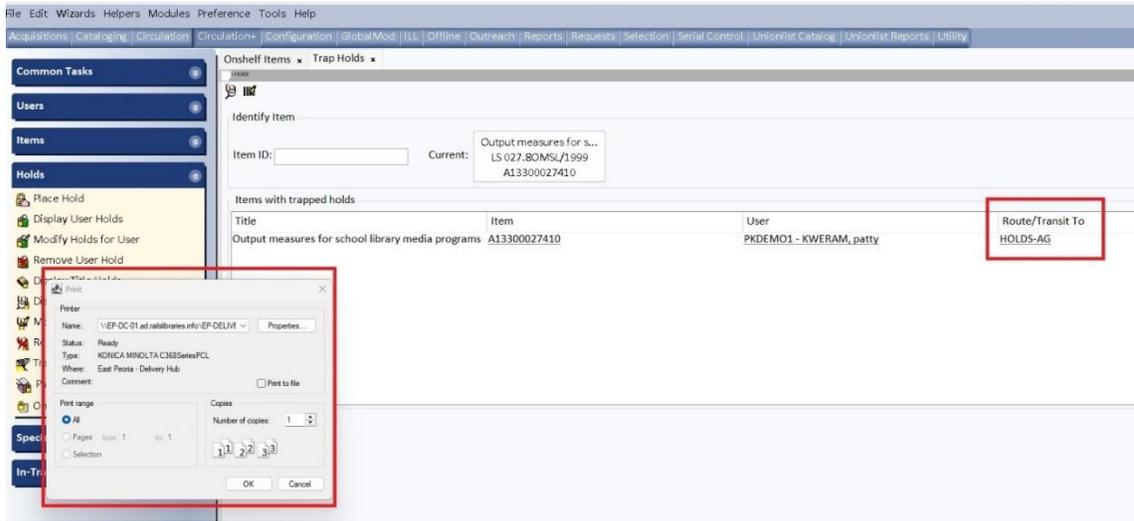
Transit slip



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.

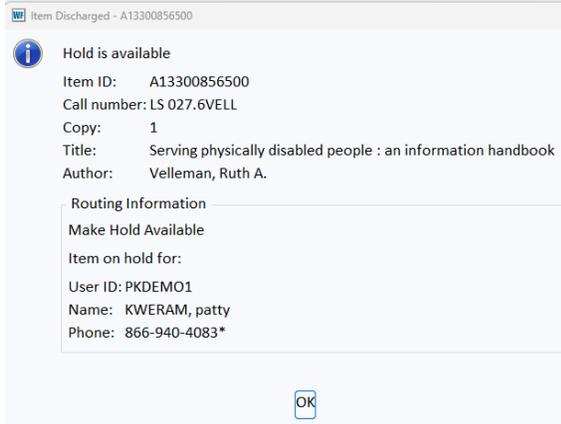
No Holds Found when trapping a hold

- 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

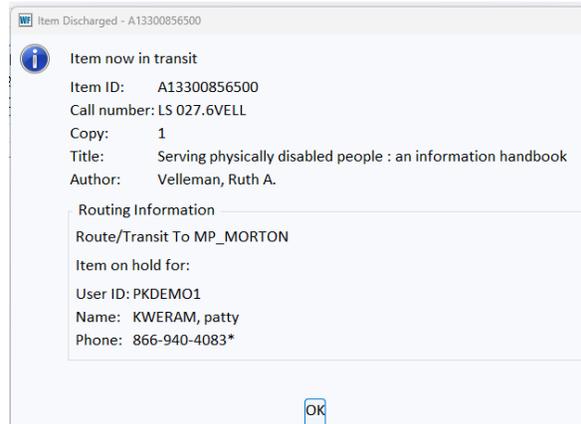
- Upon discharging an item, you may get a pop-up box that indicates an item is needed to fill a hold.

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

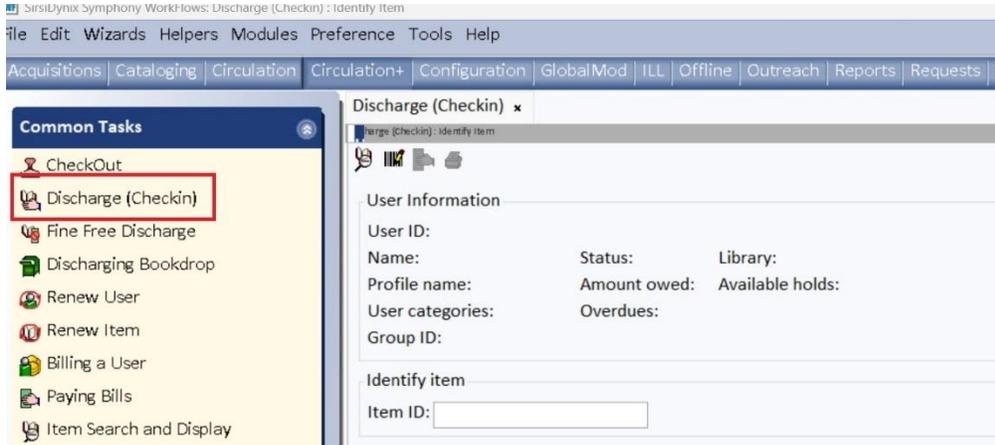
For items transiting to another RSA Library:

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

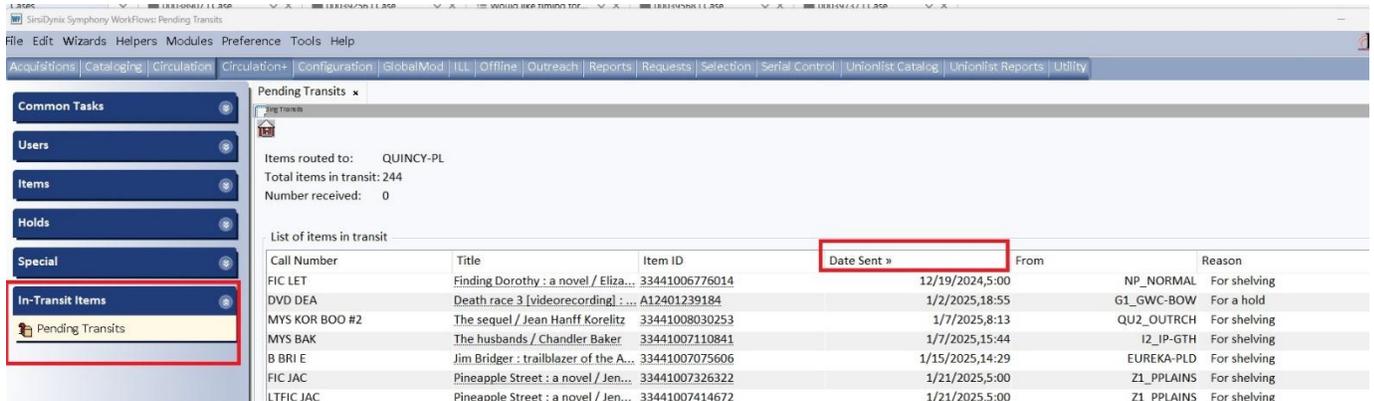
- Go to WorkFlows>Circulation+ Group>Discharge



- 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

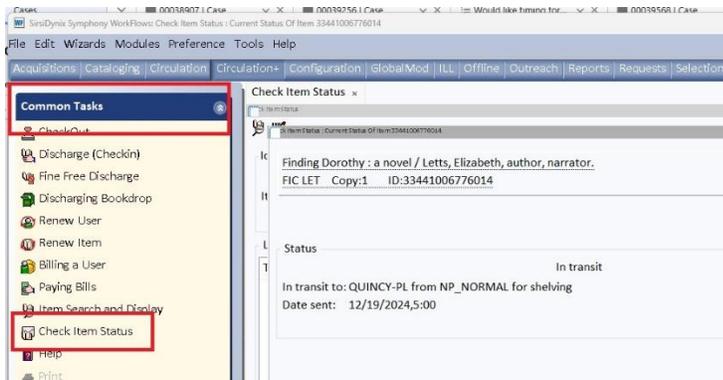
See Processing LOST-TRANS Lost in transit items [link]

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.