

Processing Holds Guide

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Contents Table

1
2
2
8
8
10
10
10
11
11
12

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							
H							
					_		
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.

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1	A							
ľ						_		
	On shelf: 23							
	Onshelf Hold Items: AP_AL	РНАРК				_		
	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 Circula	atio	n Circulation	+ Configurat	ion GlobalM	od ILL Offlin	ne Outreach	Reports Rec
Print Preview	Utility							
Print Screen	atus		Onshelf Items	×				
Print Setup		6	Inshelf Items					
Page Setup			a					
Exit	Help		On shelf: 4					
Users	8							
			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
A Place Hold		Ш	J GUT	Mrs. Yonk	Gutman, D	A3720095	BOOK-J	CHAPTRB
			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.

Innon Lasks () () () () () () () () () () () () ()	tem ID: Current: Items with trapped holds Title ELLISON DIE SHAPE: BOY #4	ELLISON DIE SHAPE: BOY #4 ED BOY #4 A13300990922	User PKDFMQ1 - KWFRAM. patty	Route/Transit To
rrs	tem ID: Current: Items with trapped holds Title ILLISON DIE SHAPE: BOY #4	ELLISON DIE SHAPE: BOY #4 ED BOY #4 A13309990922 Item A13300990922	User PKDFMQ1 - KWFRAM: patty	Route/Transit To
ns () Ite ds () Place Hold Cisplay User Holds Modify Holds for User EL Printer Printer	tem ID: Current: Items with trapped holds Title ILLISON DIE SHAPE: BOY #4	ELLISON DIE SHAPE: BOY #4 ED BOY #4 A13300990922	User PKDFMQ1 - KWFRAM: patty	Route/Transit To
Place Hold Its Display User Holds EL Modify Holds for User EL Manage Plant Pinter	Items with trapped holds Title LLISON DIE SHAPE: BOY #4	Item A13300990922	User PKDFMO1 - KWFRAM, patty	Route/Transit To
Display User Holds TT Vlodify Holds for User EL Print Print Print	Title LLLISON DIE SHAPE: BOY #4	Item A13300990922	User PKDEMQ1 - KWERAM, patty	Route/Transit To
Vlodify Holds for User EL Compute User Hold Print Printer	LLISON DIE SHAPE: BOY #4	A13300990922	PKDEMO1 - KWERAM, patty	MP MORTON
Name: \VEP-DC-01 ad rahlstranes info \VEP-DELIVI V Stata:: Ready Type: KONICA MINOLTA C368SeriesPCL Where:: East Peora - Delivery Hub T Comment:	Properties.			
Print range Copies Al Number of Copies Pages from 1 to 1 Selection	f copies: 1 0			

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	90922
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	
Iransit to: MP_MORION	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 Discharged - A13300856500	💓 Item Discharged - A13300856500
Hold is available Item ID: A13300856500 Call number: LS 027.6VELL Copy: 1 Title: Serving physically disabled people : 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*	Item now in transit Item ID: A13300856500 Call number: LS 027.6VELL Copy: 1 Title: Serving physically disabled people : an information handbook Author: Velleman, Ruth A. Routing Information Route/Transit To MP_MORTON Item on hold for: User ID: PKDEMO1 Name: KWERAM, patty Phone: 866-940-4083*
OK	OK
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 ×								
On shelf: 3								
0	AC . N.C. 00C							
Onshelf Hold items:	AG_ALS-PDC			1. 10				
Call Number »	Little		Autnor	Item ID	Item type	Current location	Date/Time Disc Pickup Libra	
ED GINGERBREAD G	ELLISON DIE SHAPE: GINGE	RBREAD GIRI		A13300997542	EQUIP-MISC	EQUIP	5/19/2024,14:38/AG_ALS-PDC	
ED GIRL #J	D GIRL #5 ELLISON DIE SHAPE: GIRL #5			A133001133373	EQUIP-MISC	EQUIP	7/10/2024,14.31 AG ALS PDC	
ED GIRL, GEINERIC	ELLISON DIE SHAPE, GIRL,	JEINERIC		A13300670322	EQUIP-INISC	EQUIP	7/10/2024,15:47 AG_AL3-PDC	
			4 5					
			V					
		W Onshelf Item	s : Glossary					
		Bibliographic Info						
		Equipment name: ELLISON DIE SHAPE: GINGERBREAD GIRL						
		Volume And Copy Info (Displaying 1 of 1 volumes)						
		ED GINGER	BREAD GIRL	Copies: 1 Library: A			G_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.

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Onshelf Items x						
Constant Constant						
國出						
On shelf: 1						
Onshelf Hold Items: AG ALS-PDC						
Cultationshipping	4.41	10.000			C	Data (Timpintan Distan
ED GINGERREAD G ELLISON DIE SHARE	Aution	A12200007542	FOLLOW	190	FOLUE	2/10/2024 14-28/06 4
ED GINGENBIREAD G ELEISON DIE SHAPE		M13300997342	EQUIP-MISC		EQUIP	5/15/2024,14.30
-						
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				1 1		
				1 1		
				1 1		
				11		
				11		
				11		
				11		
				- V		
		Te	an Hold for	Mark Item		
		Sel	ected Copy	Missing	Unfill Hold Pri	int Close
					li in the second se	L

- <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-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 Pr	eference Tools Help					
Acquisitions Cataloging Circulation Ci	rculation+ Configuration	GlobalMod ILL Off	line Outreach Repor	rts Requests S		
	Discharge (Checkin) ×					
Common Tasks	harge (Checkin): Identify Item					
2 CheckOut	99 IIII 🕪 🖝					
👺 Discharge (Checkin)	User Information					
Ma Fine Free Discharge	User ID:					
P Discharging Bookdrop	Name:	Status:	Library:			
😰 Renew User	User categories:	Amount owed: Overdues:	Available holds:			
🕡 Renew Item	Group ID:					
😭 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	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.