

Holds Processing Procedures

General Guidelines

The order and priority of holds should not be manipulated.

Patron Placed Holds

Patrons are allowed to place and cancel holds and change pickup locations in InfoSoup.

Holds Processing

See the OWLSnet website for details on the following:

- Placing a hold
- Find a patron's place on the hold list
- Canceling a hold
- Editing a hold

Do Not Reserve Items

Loaning material is reciprocal. If you do not accept holds on certain kinds of items, then you should not ask to reserve them.

Title and Item Holds

All OWLSnet libraries will place title holds. Item and issue holds can only be placed for the following:

- Issues of magazines (Issue-level hold)
- Multi-volume sets (Issue-level hold)
- Items owned by your library that need to be retrieved for technical processing (Item-level hold)
- Retrieving a specific item for a patron, such as a signed copy of a book (Item-level hold)

Infosoup automatically determines the proper level of hold – title or issue. When placing holds in the CARL-X Client staff must be careful to choose “Hold Type: *Institution*,” unless the item fits one of the item/issue hold exceptions.

Materials on Order

Materials that are on order may be reserved. If the title proves to be unavailable, libraries will be notified.

Multi-part Videos

Multi-part videos that are one bibliographic entity are not all handled the same way. Some are packaged together with one barcode and others are packaged separately with multiple barcodes. When placing holds on multi-part videos, place an item hold on the set or individual pieces that are desired. In the CARL-X client, select the item and choose “Hold Type: *Item*” and “*Place Hold*.”

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Rotating Items

Items may rotate from one library to another. When rotating items are sent to another library, the owning library changes the item branch and location code, if necessary, to the library the items are being sent to.

Circulating items on the holdshelf

Items should be checked out to the same patron barcode number that was used in placing the hold. A specific item is trapped to fulfill a hold for a specific patron.

If a different family member is picking up an item that is ready for pickup, make sure to choose “Charge and Satisfy Hold” from the options that come up to ensure check out and cancellation of the existing hold. If you check an item out to a family member and do not cancel the original hold, the item may show up on the Expired Holdshelf and Router/Fill lists even though it is checked out.

Expired Holdshelf

The holdshelf must be cleared each weekday your library is open. OWLSnet recommends that the holdshelf also be cleared every weekend day your library is open, although this is not required. Print out the Expired Holds -report 80- and follow the instructions to fill other holds or return items to the other libraries or your library’s shelves.

Hold List Procedures

Each library can prepare their item, title and issue router lists from the Router option under the Circulation menu in CARL-X or the Fill List option in Connect. The title router list should be prepared at least once a day, although OWLSnet recommends this be done twice a day. The item and issue router list should be prepared at least once a day. Detailed instructions for processing the router lists can be found on the OWLSnet website.

Routing Materials

All materials that enter your library should be checked in. When items with holds are checked in, you will be notified if the hold is for pickup at your library or another library.

1. If your library is the pickup point, set the item aside (the status will be *Holdshelf*). Notify patrons that do not receive email notification. When the patron picks it up, check it out to the same patron barcode that was used to place the reserve, or cancel the original hold if a different family member/patron is picking up the item for the *Holdshelf* patron.
2. If the pickup point is another OWLSnet library (including OWL and NIC), print the transit slip to route the material there by van. Be sure to use the correct branch code. This will give the item a “*Hold in Transit*” status.
3. Checked in material owned by a different OWLSnet library will have an “*in transit*” status. Route material back to the owning library with the appropriate routing slip.

