

**CIRCULATION TASKS – HOLDS**

<u>Sierra</u>	<u>CARL•X</u>	<u>CARL•Connect Staff</u>
Clearing the Hold Shelf	<p>This process will not automatically move the hold on to the next patron like it does in Sierra. There will be 3 steps, which are broken down below.</p> <ol style="list-style-type: none"><li>1. Run Expired Holds Report</li><li>2. Pull expired Holds from Hold Shelf</li><li>3. Scan pulled holds through Returns/Check In, 1 by 1, to Activate Next Hold</li></ol> <p><b>Run Expired Holds Report</b></p> <ul style="list-style-type: none"><li>• Along the top menu, choose Reports &gt; Circulation &gt; 80 Holds Expired List</li><li>• If your library is not highlighted under the Parameter Set, choose it from the dropdown menu</li><li>• Click “Run”</li><li>• When the report is finished running, you will see it appear in the “Transfer from Server” list</li><li>• Highlight your report from and click “Transfer.” This will move it to “Available Copies” on the right</li><li>• Highlight the report in “Available Copies” and click “View”</li><li>• To print this list, click the print icon in the report that opens</li></ul> <p><b>Scan Pulled Holds Through Returns/Check In to Activate Next Hold</b></p> <ul style="list-style-type: none"><li>• Once the items are pulled, either from the Expired Holds</li></ul>	Must be done in CARL•X

	<p>list or by using the Pull Date on the due slips</p> <ul style="list-style-type: none"> <li>• Go to Return in CARL•X</li> <li>• Scan the barcodes</li> <li>• Click “Activate Next Hold” when a big, red box appears that says “Item Should Be On Holdshelf” to send it into transit or place it on the hold shelf</li> </ul>	
Editing Patron Holds	<ul style="list-style-type: none"> <li>• Start in a patron record</li> <li>• Go to the Summary tab</li> <li>• Highlight the item to edit</li> <li>• Click one of the following buttons:</li> <li>• “Change Pick-up Branch” and select the new pick-up branch from the dropdown</li> <li>• “Modify NNA Date” to extend, modify or suspend the hold</li> </ul>	<ul style="list-style-type: none"> <li>• Start in a patron record</li> <li>• Click “My Account” to open a new browser tab with more patron information</li> <li>• Click “Holds” on the left side</li> <li>• Under the title, choose one of the following:</li> <li>• “Cancel Hold” to remove the item immediately</li> <li>• “Suspend Until” to bring up a calendar so you can choose the new date</li> <li>• “Change pickup location” to provide a dropdown box with all the locations</li> <li>• If you have no more holds, fines, or items to manage in the patron’s record, close the browser tab</li> </ul>
Fulfilling Holds at Check-in	<ul style="list-style-type: none"> <li>• Start in Returns (F3)</li> <li>• Scan item barcode into “Enter Barcode”</li> <li>• A big, red box will prompt notify you of a hold</li> <li>• Click “Print Receipt” to print a hold slip or transit slip or “OK” to accept the hold</li> </ul>	<ul style="list-style-type: none"> <li>• Start in Check In</li> <li>• Scan item barcode in “Scan or Enter an Item ID”</li> <li>• A box will alert you of a hold. Click “Continue &amp; Print” to print a hold slip or transit slip or “Continue” to not print</li> <li>• If printing, select printer and click “Print”</li> </ul>
Hold Management of bibs/items	More soon	Patron-level holds maintenance can be done in CARL•Connect Staff.

		Detailed holds management, such as manipulating holds queues and viewing all patrons who have a hold against an item, must be done in CARL•X.
Placing Bib Holds	<ul style="list-style-type: none"> <li>• Start in Holds (F7)</li> <li>• Scan the patron barcode in the ID box, or search by name in the Name field</li> <li>• When the patron’s information loads, enter the search terms for the item to place on hold</li> <li>• In the results list, highlight the correct item and click “Select Back” or double click</li> <li>• Select “Institution” as the Hold Type</li> <li>• Check the “Retain Title” next to the search terms to place multiple holds on the same title</li> <li>• Select a Pick-up branch from the drop-down menu</li> <li>• Enter the “Not Needed After Date”</li> <li>• Click the “Place Hold” button</li> </ul>	<ul style="list-style-type: none"> <li>• Start in a patron record</li> <li>• Click “My Account” to open a new browser tab with more patron information</li> <li>• Enter the item information the patron would like to place on hold in the search box above their information. Search in the same way you would search the online catalog</li> <li>• When you find what they’re looking for, click the orange “place hold” button</li> <li>• Choose the pickup location</li> <li>• Click “Submit Hold”</li> <li>• Bib holds are placed unless there is an issue available</li> </ul>
Placing Item Holds	<p>**Note: Issue Level Holds will allow holds against a specific volume or issue of an item. Use this method for a specific item, such as one that needs to be evaluated by staff</p> <ul style="list-style-type: none"> <li>• Start in Holds (F7)</li> <li>• Scan the patron barcode in the ID box, or search by name in the Name field</li> <li>• When the patron’s information loads, enter the</li> </ul>	Must be done in CARL•X

	<p>search terms for the item to place on hold</p> <ul style="list-style-type: none"> <li>• In the results list, highlight the correct item and click “Select Back” or double click—only this item will fill the hold</li> <li>• Select “Item” as the Hold Type</li> <li>• Select a Pick-up branch from the drop-down menu</li> <li>• Enter the “Not Needed After Date”</li> <li>• Click the “Place Hold” button</li> </ul>	
<p>Placing Issue (Volume) Holds</p>	<ul style="list-style-type: none"> <li>• Start in Holds (F7)</li> <li>• Scan the patron barcode in the ID box, or search by name in the Name field</li> <li>• When the patron’s information loads, enter the search terms for the item to place on hold</li> <li>• In the results list, highlight the correct item and issue or volume and click “Select Back” or double click</li> <li>• Select “Issue” as the Hold Type</li> <li>• Check the “Retain Title” next to the search terms to place multiple holds on the same title</li> <li>• Select a Pick-up branch from the drop-down menu</li> <li>• Enter the “Not Needed After Date”</li> <li>• Click the “Place Hold” button</li> </ul>	<ul style="list-style-type: none"> <li>• Start in a patron’s record</li> <li>• Click “My Account” to open a new browser tab with more patron information</li> <li>• Enter the item information the patron would like to place on hold in the search box above their information. Search in the same way you would search the online catalog</li> <li>• Click the orange “place hold” button when you find the desired item</li> <li>• Select pickup location from the drop-down menu</li> <li>• Check each box next to the volume you wish to place a hold against</li> <li>• When finished, click “Submit Hold”</li> </ul> <p>This is called “Issue-level holds” in CARL. It will search for all copies of that particular volume in our system.</p>
<p>Remove Hold from Patron Account</p>	<ul style="list-style-type: none"> <li>• From the Holds result screen, click “Patron Info”</li> <li>• Click the Summary tab</li> <li>• Choose the Requests radio button</li> <li>• Highlight the hold to remove</li> </ul>	<ul style="list-style-type: none"> <li>• In a patron record, click “My Account” to open a new browser tab with more patron information</li> <li>• Click “Holds” on the left side</li> </ul>

	<ul style="list-style-type: none"><li>• Click "Cancel Hold"</li><li>• Confirm deletion by clicking "Yes" in the pop-up window</li><li>• Select a Cancel Reason from the drop-down menu. Clicking "Other" will bring up a free text box</li><li>• Check the "Patron Notification Needed" to send an email to the patron</li><li>• Click "OK"</li></ul>	<ul style="list-style-type: none"><li>• Click "Cancel Hold" under the item's title</li></ul>
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