Evergreen Indiana - Holds

Professional Development Office

Indiana State Library

Intro to Holds in Evergreen

- The backbone of the holds system in Evergreen Indiana is patron-initiated holds.

- We call holds Transits, rather than ILL because they are patron-initiated.

- Upon checking in an item at your library, regardless of whether you own the item, your library receives the circulation stat.

- 5 main factors involved in placing holds
  - Patron Type, Circ Modifier, Item Status, 6-month age protection, Pickup library

#1: Patron Types

- A patron's user profile group determines the scope of the patron's ability to place holds.

- Full access to consortium
  - Residents, non-residents, PLAC, outreach, temp and staff

- Access to issuing library materials only
  - Reciprocal borrowers and student

*Computer Users may not place holds.

*Limited Access may not place holds on r-rated AV.

Patron Type Hold Messages

Place Hold

☐ Harry Potter and the chamber of secrets [text: lg. print] / J.K. Rowling ; illustrations by Mary Grandpré.
Hold was successfully placed

Continue

Place Hold

Harry Potter and the deathly hallows / by J.K. Rowling ; illustrations by Mary GrandPré.
☐ **Hold was not successfully placed**
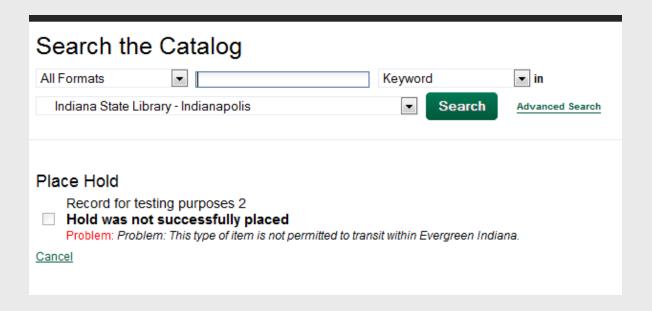Problem: *The patron's account has expired*

Cancel

#2: Circ Modifiers

- Items with the following circ modifiers do not fill holds that would cause them to transit:
  - art, bestseller no holds, dvds and videos, cd-music, equipment, media, realia, software gaming, special collections
- Patrons may place a hold, pick up an item from the owning library and return anywhere.

Circ Modifier Hold Messages

- Problem: This type of item is not permitted to transit within Evergreen Indiana.

#3: Item Status

- Holdable item status
  - Available, Checked Out, In Process, In Transit, On Holds Shelf, On Order, Reshelving
- Unholdable item status
  - Bindery, Cataloging, Damaged, Discard/Weed, ILL, Lost, Missing, Reference, Temporarily Unavailable

Item Status Hold Messages

- Holdable? No

- Problem: The system could not find any items to match this hold request.

LOCATION	CALL NUMBER	BARCODE	SHELVING LOCATION	AGE HOLD PROTECTION	CREATE DATE	HOLDABLE?	STATUS	ANTICIPATED DUE DATE *
Indiana State Library - Indianapolis	TEST VOLUME 1 (Text)	00000105472385	Stacks	6month	01/30/2013	Place on copy / volume	In process	-
Seymour Main Library	TEST VOLUME 2 (Text)	00000105472377	Fiction	None	01/30/2013	No	Bindery	-

Place Hold

Record for testing purposes 2

☐ **Hold was not successfully placed**

Problem: The system could not find any items to match this hold request

Cancel

#4: 6-month age protection

- Applying 6-month age protection ensures that your new item will not leave your local library system to fill holds.
  - 6-month age protection wears off automatically and the item will begin filling opportunity-based holds right away.
  - Items can transit between branches during 6-month age protection.
  - If item is picked up at the owning library and dropped off at another library, it will transit back to the owning library.

6-month age protection – Staff Client side

Place Hold

Record for testing purposes 1
☑ **Hold was not successfully placed**
Problem: All available copies are temporarily unavailable at your pickup library due to age protection. Items less than 6 months old cannot be transited outside of the owning library. Placing this hold could result in longer wait times.

You have permission to override some of the failed holds.
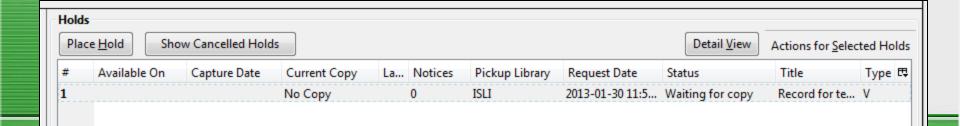**Click Submit to override and place your hold on the selected items.**

Submit   Cancel

Place Hold

☐ Record for testing purposes 1
Hold was successfully placed

Continue

Holds

| Place Hold | Show Cancelled Holds | | | | | | Detail View | Actions for Selected Holds |

#	Available On	Capture Date	Current Copy	La...	Notices	Pickup Library	Request Date	Status	Title	Type
1			No Copy		0	ISLI	2013-01-30 11:5...	Waiting for copy	Record for te...	V

#5: Pickup Library

- Proximity
  - At item checkin, if there are any holds that the item can fill at the checkin library, they'll be filled before allowing the item to transit to fill holds at another library.

- Opportunity
  - If a library's item transits to another library, it will stay there as long as there are appropriate holds to fill in order to minimize transit expenses.

#5 Pickup Library- Proximity

Assume that all copies are unavailable until Jan. 6 when the copy is checked in at Thorntown PL.

Jan. 1: Judy places a hold with a pickup location of Lebanon PL.

Jan. 5: Jerry places a hold with a pickup location of Thorntown PL.

Jan. 6: Item is checked in at Thorntown PL.

Hold is filled for Jerry. System continues to look for Judy.

#5 Pickup Library - Opportunity

Assume that there is only one copy available in the consortium.

Jan. 1: Judy places a hold with a pickup location of Lebanon PL.

Jan. 5: Item transits to Lebanon PL from Thorntown PL to fill Judy's hold.

Jan. 24: Jerry places a hold with a pickup location of Lebanon PL.

Jan. 26 Item is returned and is targeted for Jerry's hold at Lebanon PL.

Placing a Hold

- Staff members should never place a hold with their staff account (localadmin, circ1, cat2, etc.)

- Rather, you may create a new patron account and place holds with that account.
  - Example: BOOKCLUB

- Designating someone to pickup a hold.

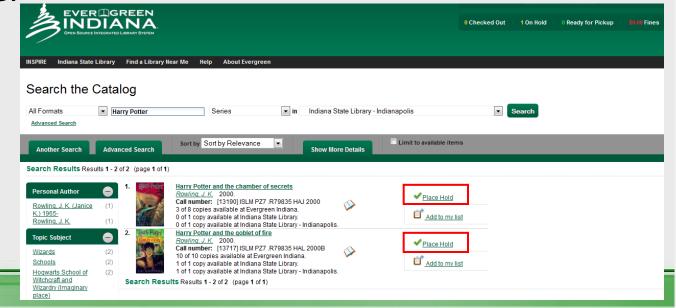# Holds in Staff Client

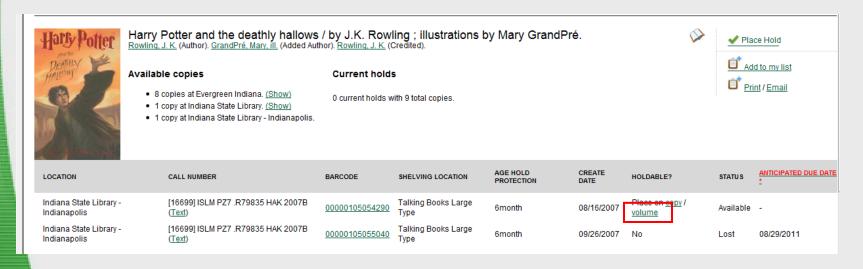# Placing a hold in OPAC

Placing a hold in Staff Client

Types of Holds

- Title hold
  - This hold can be placed by the patron or staff member.
  - It targets all copies attached to a title and attempts to fill the hold with the first one it finds available.
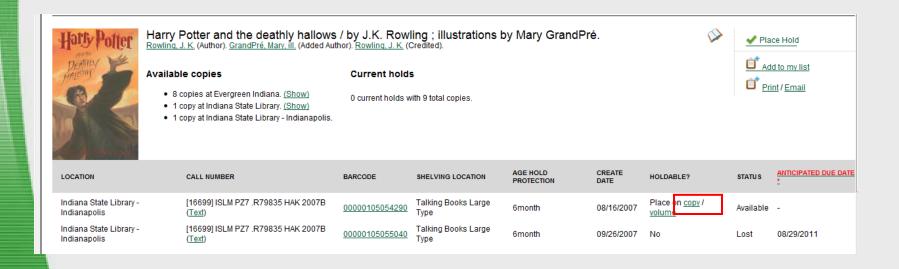
Types of Holds

- Volume hold
  – This hold can only be placed by staff members.
  – Think of this as the Call Number hold.
  – Ideal for targeting specific magazines or series items.

Types of Holds

- Copy Hold
  - This hold can only be placed by staff members.
  - This type of hold can only be fulfilled with a specific item.
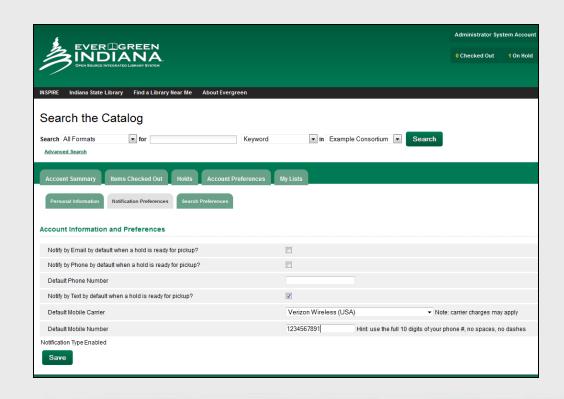
Transit Workflow

- Most libraries train several staff members to process transits.
- Print/Export the Holds List each morning and pull corresponding items.
- Items are checked in and a transit slip for each is printed.
- Items are packaged for transit so as to minimize wear-and-tear.
- InfoExpress label is created for each destination and taped into the InfoExpress bag's front pocket.
- Once the items transit to the circulating library, staff checks items in and puts on holds shelf.
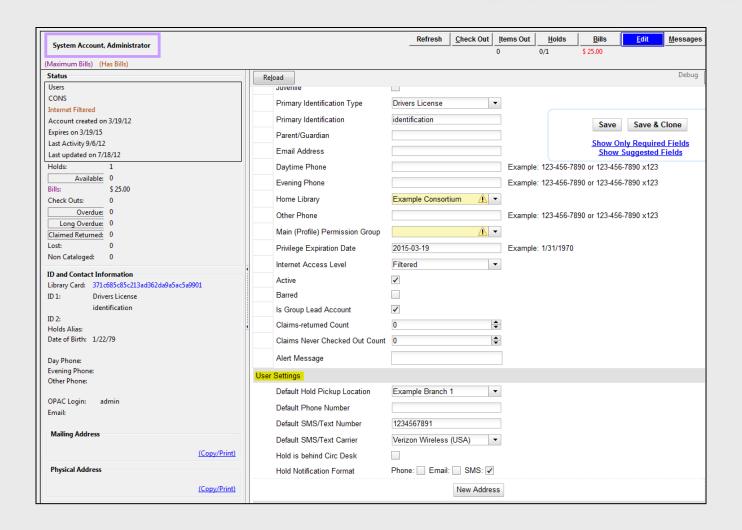
Hold Notifications

- Patrons can choose to be notified that their hold is ready to be picked up in three different ways:
  - Phone
  - Email
  - Text Message

Hold Notifications

Hold Notification - Phone

- Phone notification option
- They can enter their default phone number in their My Account but have the opportunity to change the number before placing the hold.
- Numbers should use the following standard: 1111111111 or 111-111-1111
- The recording begins as soon as the phone is answered.

Hold Notification - Email

- Email notification option

- It is a good idea to notify patrons from what email address the hold notice will be sent.

Example:
evergreen@evergreen.lib.in.us

Hold Notification - Email

- What to do if your patron did not receive the email hold notification.
  - Check the spelling of their email address.
  - Check the Triggered Events in their account.
  - Ask them to check their spam folder.
  - Ask them to get in touch with their email provider and request that the domain evergreen.lib.in.us be white-listed.

Hold Notification – Text Message

- A patron can choose to be notified by text message that their hold is ready.

- They enter the number and provider in their My Account and confirm the information before they finalize the hold request.

- Charges for text messaging may be applied by cell phone provider.

AT&T 3G   9:00 AM

Messages   **Evergreen IN**   Edit

Hello John! The item you placed on hold is available for pickup at the library. Please pick it up at your convenience. Sincerely, Your Local Library

Holds Issues

- Documenting holds issues
  - What type of permissions does the patron have?
  - Is the item circ modifier and 6 month age protection (optional) set correctly?
  - What is the status of the item? Could it have changed in the past 24 hours?
  - What pickup library was chosen?
- Old in-transit items

Holds FAQ

- Patron did not receive the hold notification.
- Phone call did not include library name.
- Patron cannot log into My Account to place a hold.
- Patron requests holds history.
- Patron requests their number in the holds queue.
  - Anticipated Due Date
  - Average of 7 days to fulfill a hold
- If a patron has lost checkout privileges, can they still place a hold?

Resources

- Cataloging Manual, Chapter 21: Holds

http://www.in.gov/library/files/Cataloging_Training_Manual_Chapter_21.pdf

- Circulation Policy and Procedures

http://www.in.gov/library/3382.htm